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Interesting Times

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Cover: The Great Wave by Hokusai reproduced by courtesy of the Board Of Trustees of the Victoria and Albert Museum, London

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Exploring The Inner Limits

I mean no disrespect to Television of Inner Mongolia. But when the pre-Mip Asia press material highlights a quote from someone hailing from that little-visited territory, you can't help wondering about the significance of the event in the calendar of the world's international tv business.

Walt Disney and Paramount won't set up shop in the Hong Kong Exhibition Centre, and didn't last year. Among those who did, but who won't be there this time around, are the BBC, Columbia Tristar, 20th Century Fox, Warner Bros. and Worldvision. India's busy production industry also seems to have given Mip Asia the cold shoulder. People will probably be talking about the big names who won't be there.

Or will they? Certainly smaller companies, many of which reported good business last year, won't mind. And the cat won't be entirely away. The majors can always send regional managers to snoop around the market incognito or receive buyers in the exclusive splendor of a hotel suite.

Maybe there is a hint of pique at the loss many of the big exhibitors undoubtedly made last time out.

Mip Asia seemed to blend seamlessly into Mipcom at the tail end of the year. Attracted by the general idea that Asia was a booming market, and in particular by the prospect of 50-odd buyers from Chinese tv stations, exhibitors signed on the dotted line, possibly in a haze of post-market euphoria, possibly dogged by the fear of missing out on an exclusive multi-year output deal with the CCTV.

This time, they say they are adequately served by their regional offices and are able to keep up with their big clients in the region either by making trips to see them (though I bet Inner Mongolia isn't yet on that itinerary) or at other markets through the year.

Besides, this year's crop of network and off-network shows have now been touted around since May, and some may be starting to look a little the worse for wear. Some have already flopped on domestic tv and suffered cancellation.

And yet, despite the absentees, the attendance is expected to be slightly up on last year (although judging by the organizers' figures there will be 400 buyers who came last year who aren't coming back).

The majors may have formed an opinion about the marketplace, but others are open-minded. There is a big turnout from Japan, the real power in this region, and a host of distributors looking to meet demand for documentaries, action series, animation and telenovelas, all of which rate well in the region. And two of the majors – MCA and MGM/UA – are going to be there.

There are buyers out there, many of whom may be interested in buying foreign programming but not so much that they would travel all the way across the world to see what's on offer. It makes sense to support a market that brings the international tv business to their doorstep. Not just in hopes of future demand, but in order to shape it.

You might even hazard a guess that the majors will be back in force as early as next year – whether Mip Asia is in Hong Kong, Sydney, Singapore, or perhaps Inner Mongolia.

Tim Westcott

The Editor

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In earlier times, one of the idle topics for industry discussion was whether commercial tv in the U.S. was a profession or a business.

Most executives liked having it both ways and prided themselves on being professional broadcasters who worked diligently at raising their profit margins.

Deregulation ended that kind of talk in the mid-80s. The new wave of station and network owners never had to give a moment's thought to broadcasting as a profession. In a seismic shift, the traditional primary obligation of serving the needs of the citizenry (however theoretical) gave way unabashedly to serving first and foremost the interests of the stockholders.

I offer this as background to the story I'm about to tell, which otherwise would seem absurd, or at least mystifying, to most professionals across the oceans.

Since midsummer a debate has been raging in Washington on how to interpret and enforce a law that was passed by Congress in 1990.

The issue not only has the entire industry all worked up but has erupted into a rancorous dispute between Federal Communications Commission chairman Reed Hundt and the agency's senior member, James Quello.

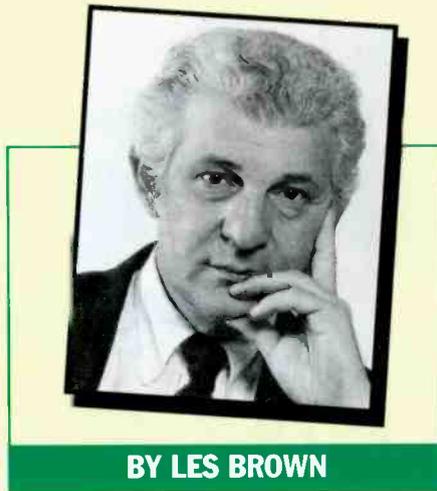
All the heat is being generated, believe it or not, by the fundamental public service issue of providing properly for children. Five years ago, in response to rising complaints over the exploitative nature of children's tv on the main channels, Congress passed a law requiring broadcasters to provide some educational programming for kids as a condition of keeping their licenses.

Reasonable enough, you would think. Not a lot to ask as a payback for a free license to make heaps of money. But what many of the stations logged as their educational effort for children were reruns of two animated sitcoms of the 60s, *The Flintstones* and *The Jetsons*.

Some listed the old *Yogi Bear* cartoons and some more modern kidvid potboilers that raised the protests in the first place.

When this was reported in the press, much of the public was outraged, and some members of congress thought it

The Lessons Of Rule-Making



BY LES BROWN

made a mockery of the law. So it fell to the FCC to set things right.

Hundt proposed in a public speech that the stations be required to provide three hours a week of children's programming that was definitely educational. That's when the shouting began.

Quello, angry at the chairman's play for public support before the whole commission made any determination, indulged in some name-calling while openly trashing Hundt's proposal on constitutional grounds.

He argued that the First Amendment (free speech/free press) prohibits a government agency from dictating content or establishing quotas.

In the ensuing debates involving legislators, broadcasters, lawyers and public interest advocates, education became a term with a slippery definition. Nearly every kind of program can be defended

as having some educational component or value.

The plot thickened when, in the midst of it all, Group W Broadcasting was pressured into pledging three hours of good kidvid programming a week when it acquires CBS. The announcement served to call off a petition opposing the merger from three public interest groups which would have delayed approval for months.

The three-hour demand from the groups sounded suspiciously like the Hundt prescription, and this gave more ammunition to Quello and the broadcast lobbyists.

The somewhat professional broadcasters of the past would have grumbled a bit but complied fully with the Children's TV Act, as the pragmatic thing to do. You give up a little to appease government, and after a few years when the heat is off you go back to doing as before.

But today's broadcasters don't behave that way. They know for certain that an educational children's program won't make much money. Kids are a small universe made smaller by the fact that they are fragmented as an audience by age groupings.

The genius of scheduling programs like *The Flintstones* is that all the young age groups will watch it, and some adults as well. Moreover, it's a known quantity to advertisers. Well maybe it's not educational – but who's going to prove it?

That's how the cynical businessman reasons, and when this matter is all finally resolved his logic is likely to prevail. The FCC majority is tilting to Quello's side.

Everyone really knows what educational means and what the law intends. But we're dealing with Humpty Dumpty here. Once you've deregulated and fostered a whole new mentality in the industry, it's awfully hard to regulate again and restore the old cast of mind.

Let this be a cautionary tale. [E]

**what many of the stations
logged as their educational effort
for children were reruns of
The Flintstones and The Jetsons**

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MONITOR

ASIA

Games Gather An Eager Crowd

Bidders are lining up for the Asian Games, but it isn't just about cash

The sports rights market in Asia is heating up. As ESPN and Star's Prime Sports battle it out in the pan-regional channel race, the terrestrial broadcasters are being forced to look at their own sports coverage in a different light – particularly when ESPN and Star have both indicated that the only way forward for them is to get more local with their signals and create country-specific sports channels, feeding off their main signals.

For rights holders of domestic Asian events, the prospects look good for increased television rights fees and better coverage. In Taiwan, rights to the national baseball league were sold for \$60 million in a three-year deal to UGC. Three years ago the rights were sold for just \$2 million. Star TV recently put up \$20 million in a 10-year deal with the International Badminton Federation for exclusive tv rights to major events. Star will be crucial for the development of the sport, and the

sport will be crucial for the development of Star, particularly in Indonesia. "They needed mass distribution and we needed sports we could develop," said Kelly Butler, head of sports at the broadcaster. Star has already developed multiple camera shots for matches.

Star also beat ESPN to an \$11 million deal to broadcast Asian Basketball Confederation games for four years. The region now also has its own golf tour, an event that feeds off television as much as the sports broadcasters need the hours of live coverage that it provides.

With these kinds of figures being paid for rights, it is perhaps surprising that the first major media announcement for the Asian Games (scheduled to take place in Bangkok in 1998) is the signing of Samsung as a sponsorship "partner" rather than the first television rights deal. The deal has been estimated at \$9 million and ISL Asia Pacific general manager Chris Renner expects to close further deals with five or six major sponsors in the next six months.

Sponsorship is still the most important funding stream for the games, providing as much as 75% of revenue. And for sponsors, tv exposure is important to their marketing.

It is a circle that has to be kept carefully rounded to keep all parties happy. "As an agency ISL is very sensitive to the needs of good coverage. We have resisted making a fast dollar," said Peter Sprogis, ISL managing director. While Sprogis has already arranged an international distribution deal with ESPN for satellite and cable rights, he expects to begin conversations in depth with terrestrial broadcasters at Mip Asia in Hong Kong this month. There are also discussions with broadcasters concerning the expertise they can provide in televising certain sports.

ISL (49% owned by Japanese ad agency Dentsu) was chosen as agent for the games as much for its widely-recognized marketing ability as its ability to sell into television markets worldwide. The 13th Asian Games is the major pan-Asian sports event and was established to encourage and improve the quality of sports throughout the region. The 1994 games in Hiroshima, Japan, saw 7,500 athletes from 43 countries compete in 34 different sports disciplines.



Making moves: Asian sports rights are bounding up

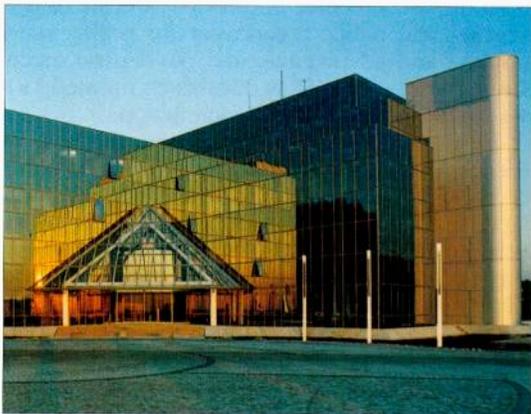
by Paul Nicholson - LONDON

POLAND

CLT Takes Direct Path To Poland

Launch of RTL7 follows satellite route pioneered by RTL and RTL4

CLT is expected to take the most direct route to providing a commercial tv service in Poland, by launching a channel transmitted via satellite from its Luxembourg headquarters. The channel, likely to be known as RTL7, could launch later this month (December) using the Astra satellite, which can be picked up by an estimated 1.4 million tv homes in the country.



Greetings from Luxembourg

Although CLT would not confirm details of its plan, it has placed advertisements for Polish-speaking staff in the European press to work on a "tv broadcasting project" in Poland.

The Luxembourg-based broadcaster's interest in Poland dates back to late 1993 when it bid, alongside Reuters Television, for a national terrestrial licence. Although it eventually lost out to Polsat, it has since mooted the idea of operating a satellite service aimed at the Polish market on several occasions.

According to Cezary Mroczkowski, the Polish National Broadcasting Council's (KRRiT's) licensing director, CLT has recently held talks with the body confirming its interest in launching such a channel. Once on air, however, it will, like all foreign-based services, be subject to certain provisions in Poland's 1993 Broadcasting Act.

This is currently being amended, with a clause being added to its 15th article which will require all foreign services targeting the Polish market via cable to respect certain program quotas. Besides requiring 30% of its annual output to be obtained from independent local producers, it will also expect at least 10% of its programming over the same period to originate from independent com-

panies deemed to be from a different country than the services themselves. The imposition of minimum European quotas by the KRRiT, though not stipulated, is left as a possible future option.

CLT will join a growing number of foreign companies that have chosen to invest in the Polish television industry since the collapse of communism. RTL 7 will become the sixth such local language service (after publicly owned Telewizja Polska's TV Polonia, the national commercial station Polsat, Nicola Grauso's Polonia 1, Canal Plus Polska and MultiChoice) available direct-to-home in the country.

by Chris Dziadul - LONDON

CANADA

CanWest Plots Takeover Of Wic

\$500m deal would create new broadcasting giant

Hard on the heels of its failed bid for a television licence in the UK, CanWest Global Communications Corp. has launched a bid to take over another Canadian broadcasting group, WIC Western International Communications Ltd.

If it succeeds in its C\$636 million (\$490 million) offer for WIC, CanWest's Global network will become Canada's third national television network and control of Canada's premiere national network, the CTV, will be put in play.

Vancouver-based WIC is publicly owned, and its empire includes eight tv stations, radio stations, two pay-tv channels, pay-per-view channels, 50% of a cable channel and 53% of Canadian Satellite Communications, (Cancom), a network satellite services provider. Through Cancom it owns 55% of Expressvu, a start-up DTH operator. WIC also holds the Canadian licence for CellularVision, a wireless cable technology for carrying voice, data and other media. In 1994 WIC had profits of \$8 million on revenues of \$301 million.

CanWest Global is a privately-owned broadcaster controlled by Izzy Asper. It has television stations in Saskatchewan, Manitoba and British Columbia, the Global Television system in Ontario and the MITV network in the Maritimes. CanWest also has interests in Chile, Australia and New Zealand. In 1994 it had profits of \$35 million on revenues of \$210 million.

Effectively, CanWest has a presence in every Canadian province except Alberta, where WIC has four stations. Leonard Asper, CanWest's director of corporate development, said that if successful the bid would fill in "our hole in Alberta. It would see the emergence of CanWest Global as a

POWER PACTING

Fox Broadcasting Company and Saban Entertainment have formed a strategic alliance encompassing broadcasting, licensing and distribution worldwide. The alliance between News Corp. and Saban – whose current mega-hit *Mighty Morphin Power Rangers*



airs on Fox in the U.S. – is likely to lead to the creation of Fox-branded channels using News Corp. distribution platforms like BSKyB, Star TV, Foxtel and its Latin American joint venture with TV Globo. The channels will draw on Saban's library of 3,300 half-hours and programs airing on FCN in the U.S., for which Fox said it would secure international rights. "This alliance is the culmination of an effort by Fox to join forces with Saban in order to access its considerable library and distinct marketing resources," said Margaret Loesch, president of FCN.

national system because we don't have any national branding or promotion right now. It would give us a better marketing position."

Asper said CanWest would like to keep all of WIC's assets. However, federal regulator, the Canadian Radio-television and Telecommunications Commission (CRTC) would probably force CanWest to sell stations in Hamilton and Vancouver – where CanWest and WIC own competing stations – if it approved the bid.

On the international side, Asper said the takeover "would give us access to a whole new pool of management, which is extremely important. We would feel more confident about expanding our interests in other countries beyond broadcast."

If successful, CanWest has stated that it would sell the 12.5% interest WIC has in CTV, thus changing the balance of power in Canada's only private national network. In a recent power struggle, Baton Broadcasting Inc. secured control of three out of the seven seats on CTV's board of directors. If it purchased WIC's interest in the network, it would be in the driver's seat at CTV.

Whether or not the deal goes through is another question. Analysts believe that CanWest's offer of Can\$24 a share, which expires on December 15, is undervalued.

To further complicate matters, control at WIC has been divided between two families, the Griffiths and the Allards. While the Griffiths are presently in control of the company, a court case being held on December 11 will determine whether or not Class B non-voting shares can be converted to Class A voting shares. The Griffiths own a majority of A shares. If the court decision favors the conversion of the non-voting stock into voting stock then the bid will be in play, regardless of the Griffiths.

by Noel Meyer – MONTREAL

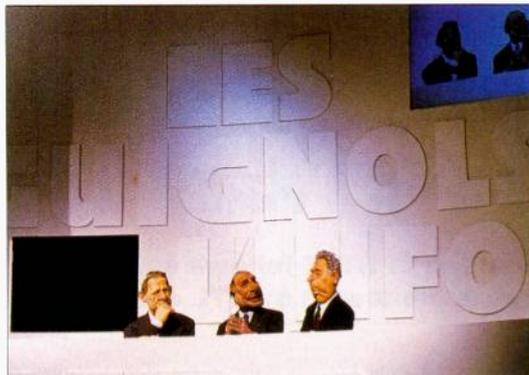
FRANCE

Rivals Call Off Feud To Take To Skies

TF1 and France TV find common cause in anti-Canal Plus front

November was an eventful month for Patrick Le Lay, president of France's leading channel, TF1. The broadcaster announced a satellite pact with former arch rival France Télévision, saw its senior executives ridiculed in a hard-hitting sketch on Canal Plus – its partner in satellite station Eurosport – and Le Lay himself was detained by police investigating corruption allegations.

Le Lay and France Télévision president Jean-



Touching raw nerves at TF1

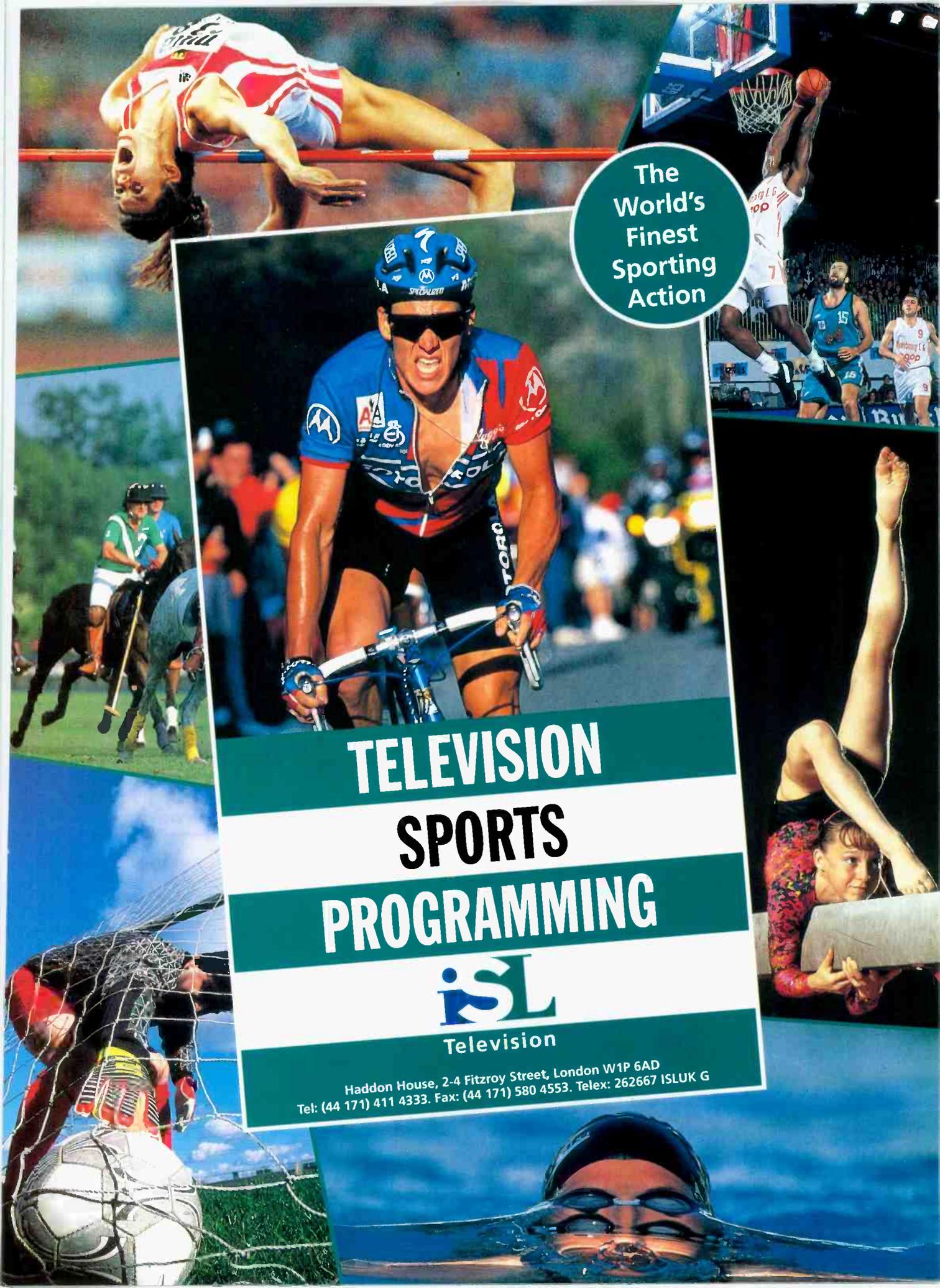
Pierre Elkabbach gave a joint press conference on November 16 to announce a joint venture to launch a bouquet of digital channels on the Eutelsat system. The sight of the two former arch-rivals on the same podium was an abrupt change from the war of words in previous weeks. Le Lay attacked the public broadcaster for getting state funding and ad revenue, and paying too much for stars and sports rights. Elkabbach riposted TF1 was responsible for the inflation in costs.

Now it seems they have become the best of friends, although it is clear that this joint venture is an attempt to upset Canal Plus, which will soon launch a digital bouquet on Astra. Recently TF1 was enraged by a sketch on Canal Plus' satirical puppet show *Les Guignols de l'info*, depicting TF1's managers as being ready to do anything to raise its ratings. Not surprisingly the program touched a few raw nerves; not only are TF1's ratings falling, but its headquarters have been investigated by the police and Le Lay was held in custody for a day and a half in connection with allegations that the channel paid bribes to obtain the tv rights for a lottery draw. Etienne Mougeotte, the vice-president of TF1, is said to have called on the board members of Canal Plus to complain to the channel's president Pierre Lescure.

France Télévision also has its grudges against Canal Plus. Elkabbach felt their management was disdainful of his proposition to co-operate with Canalsatellite, the pay-tv network's satellite bouquet. "We believed," said Didier Sapaut, head of development at France Télévision, "that Canalsatellite's digital bouquet would benefit from being able to show France 2 and France 3. Because otherwise subscribers will need two ports on their tv set to get free public channels. But Canalsatellite wanted us to pay for that."

The real question is whether this alliance is for real or just talk. Both presidents acknowledged they had no experience in selling subscriptions or decoders, and that they need other partners to fund the costly venture. CLT, for instance, has estimated the investment at \$1.04 billion over five years for a group starting from scratch, while the pay-tv group only has to invest \$83 million for three years.

by Serge Siritzky – PARIS



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TV SHOPPING: A H.O.T. ISSUE

German regulators are grappling with the issue of whether a tv shopping service is a television channel or merely an electronic mail order catalog. Their decision could have major implications for interactive tv services in Europe's biggest national market. The 15 directors of the DLM, representing the media authorities of the German Länder, have already turned down an application for a broadcasting licence by Home Order Television (H.O.T.), a \$72 million shopping service backed by commercial channel Pro 7 and mail order house Quelle Schickedanz AG, on the grounds that it's a tv channel and therefore exceeds the permitted quota of one hour a day of "special commercial formats." The H.O.T. partners' argument is that it is an interactive electronic service, and therefore outside the jurisdiction of the Länder. H.O.T. started broadcasting on a temporary licence in October. America's QVC has applied for a licence in NorthRhine Westphalia and Sweden's Modern Times Group is planning to launch a German-language version of its TV Shop service on satellite.

HONG KONG

Wharf Prepares For Pay-TV Battle

Colony's cable monopoly faces up to demanding competitors

Although a potentially lucrative market – GDP per head is \$22,800 and the British Crown Colony boasts one of the highest uptakes of new technologies and electronic goods in the world – pay-tv hasn't got off to a flying start in Hong Kong.

Currently the exclusive licensee, Cable TV, owned by Wharf Holdings, has only managed to attract 150,000 subscribers to its 20-channel MMDS service, despite the fact that, according to Eric Lo, cable operations director, over one million homes have been passed and the subscription fees, at HK\$208 (\$27) a month, remain minimal. But although Cable TV hopes to make its service more extensive and attractive once a fiber-optic system has been installed, time is running out.

Wharf's three-year exclusivity period, part of its 12-year pay-tv licence, technically comes to an end in June 1996. Although it is possible the regulatory body, the Recreation and Culture Branch (RCB), will extend Wharf's licence period on the grounds it has not had enough time to install its full network and thus create a commercially viable service, it is equally possible it could open up the market to other entrants.

At the moment only two other companies, Star TV and Hong Kong Telecom, have expressed an interest in providing pay-tv. The most imminent threat to Wharf comes from Hong Kong Telecom. The telco, which is currently upgrading its infrastructure to provide a broadband network which will be accessible to 80% of Hong Kong residents in four years' time, has said it may use the network to provide pay-tv channels. This of course will be dependent on the RCB decision to deregulate the market. More imminent, however, is the



Not much in demand so far

launch of its Interactive Multimedia Service (IMS), which, following a six-month VOD trail in 400 of the territory's homes, will be rolled out commercially next year.

Some 30 distributors including the BBC, Discovery Asia, E! Entertainment and Walt Disney provided programming for the trial, and according to Dr William Lo, managing director of Hong Kong Telecom IMS Ltd., 16 have agreed to supply the commercial service.

Wharf is currently hitting back on all fronts, though. In addition to its basic MMDS service, it has also launched what it describes as Cable On-Demand, a four-tiered interactive service. From November, two services – entertainment and news – became available to subscribers. Entertainment On-Demand offers a selection of movies from Wharf's four Cineplex pay-per-view movie channels, HBO Asia and the Movie Channel, repeated every 15 minutes. In addition, subscribers receiving their service over the pay-tv operator's fiber-optic network, which currently numbers 16,000, are able to access News On-Demand, offering an hour of Cantonese-language news.

Shopping on-Demand and Games On-Demand will come on line next year.

by Sarah Walker – HONG KONG

BRAZIL

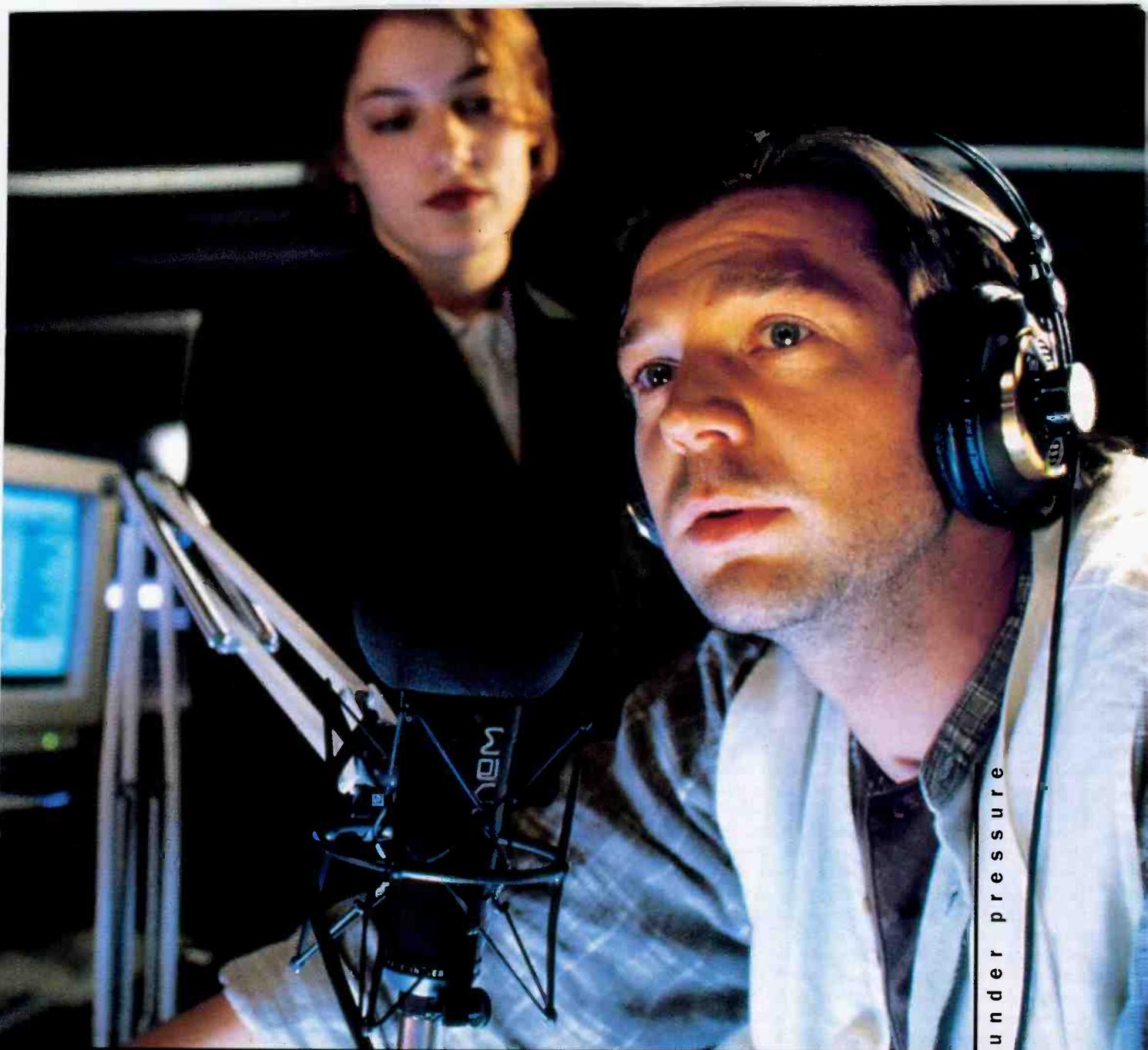
Religious Net Kicks Back

The Catholic Church plans to take its mission to the airwaves

In Brazil, a neo-Pentecostal pastor's televised kicking of the statue of a Brazilian Catholic saint on a network owned by his evangelical church has apparently given the Catholic Church the momentum to expand a nationwide, church-linked network.

On October 12, Pastor Sergio von Helder of the Universal Church, Brazil's second largest evangelical religion, created nationwide controversy by slapping and kicking 22 times a statue of Nossa Senhora Aparecida (Our Lady of the Revealed) – a representation of the Virgin Mary and the patron saint of Brazil – on a religious show broadcast by the Universal Church-owned TV Record Network.

Von Helder asked viewers during the pummeling, "how can the creator of the universe even be linked to so ugly and horrible a doll?" Brazilian President Fernando Henrique Cardoso responded by calling the gesture an example of "religious intolerance." The Pope expressed "shock" and the National Brazilian Bishops'



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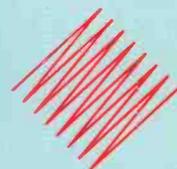
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FORWARD
LOOKING

The Asian scheduler's task can be a complicated one. The Malaysian government pulled the plug on a broadcast of *Judge Pao*, a Taiwanese-made costume drama. Even though the country's censorship board had passed the first 33 episodes, the authorities prevented terrestrial broadcaster Metrovision from airing the show at the last minute. The reason given: no more costume dramas, as the government wants Malaysians to become forward-thinking, not steeped in history. The real reason, however, is thought to be the government's fear of Chinese imperialism; currently 30% of Malaysians are of Chinese descent. Malaysia isn't the only country clamping down. Thailand's broadcasting authority is looking at extending its ban on all foreign movies that are not dubbed or subtitled into Thai, to include pay-tv channels. Indonesia, which has long banned the use of Chinese in printed materials, is however becoming a little more lenient; broadcasters can now air Chinese songs and characters.

Conference (CNBB) called von Helder's actions a "dismaying... gesture of disrespect."

And that hostile gesture, along with the rapid growth of evangelical churches and electronic pastors in Brazil, the world's largest Roman Catholic country, led the CNBB to counter-attack.

In late October, less than two weeks after the saint-kicking incident, the CNBB launched a campaign to encourage each of the country's 7,600 parishes to donate \$50 a month (totalling \$380,000 a month if each parish contributed) to Redevide de Televisao (RVT) or Life TV, a nationwide Church-linked network.

RVT, which began broadcasting in June, plans to use the money for programming. The network, along with the CNBB, is also encouraging dioceses throughout Brazil to raise funds to install the retransmitting stations necessary to capture and broadcast its satellite-beamed signal.

Currently, RVT's signal reaches those who have cable tv in eight state capitals, those with satellite dishes, and those in 100 smaller cities and towns who capture the signal on UHF or VHF channels. And while RVT is now capable of reaching over 40 million of Brazil's 150 million people, the network hopes enough dioceses will install retransmitting stations so that RVT will have 100 million potential viewers in 1996.

RVT, which broadcasts 13 hours/day on weekdays and 16 hours/day on weekends, serves up a mix of live masses, religious programs, public service broadcasts, educational documentaries, live rodeos and music shows and a seven-hour-long Sunday variety show. It runs ads – not for cigarettes or alcohol – but to pay for programming. RVT will not run telenovelas or soccer games.

Brazil's six tv networks each broadcast less than one hour a week of religious and variety shows for Catholics," said Joao Monteiro de Barros Filho, vice president of the Brazilian Christian Communications Institute, a Church-linked entity, responsible for the content of RVT programs. "We want to expand RVT to allow more Catholics to see programming that has been developed with them in mind."

by Michael Kepp - RIO DE JANEIRO

MARKETS

Newsworld: Care About Hardware

Conference and hardware side the big draw, but market slow

Newsworld 95, billed as the first international conference, exhibition and marketplace for television news, closed in Berlin last month with mixed feelings from program exhibitors, but a

more upbeat assessment from the technology companies. Held at the Intercontinental Hotel in Berlin on November 9-12, Newsworld attracted almost 300 delegates. The organizers – Newsworld is a London-based company funded by Media Ventures International – were encouraged enough to name the dates for next year's event. It will be held in the same venue on November 21-24.

The conference sessions covered issues ranging from new technology and multiskilling to safety and broadcasting without borders. On the last morning, a panel of news executives and experts participated in a hypothetical session on current news dilemmas.

Although sparks flew on one panel session between an Australian newsman and one of the few French delegates – over nuclear testing – the most lively debate was generated in the technology sessions.

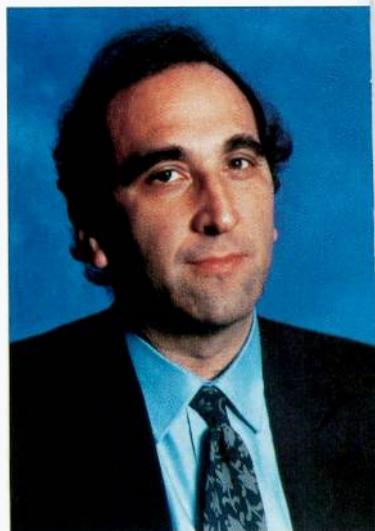
Technological innovations like round-the-clock satellite transmission, online editing and digitization threaten to revolutionize the newsgathering business. But many delegates applauded Andy Lack, president of NBC News, who addressed the delegates' dinner, when he argued: "Much too much emphasis (is being placed) on the hardware side of the business... This is obscuring the real challenge – where is the investment we're going to make in young talent?"

In a veiled dig at CNN, Lack criticized the "two chairs and a chat show" formula of news programming, and called for news organizations to invest in new product rather than recycling the same material in a variety of different media. "My great fear about the information superhighway is that there's nothing all that great on it."

Despite these reservations, exhibitors like Sony and Avid were very positive about Newsworld. Granby Patrick of Avid Technology Europe said the exhibition offered a "good chance to meet the users rather than the engineers."

Newsworld, following a month after Mipcom, appeared to have delivered little as a program market. Exhibitors like WTN and Reuters TV said they had done little business. Part of the problem was the location of the exhibition area at some distance from the conference and the fact that the sessions continued throughout the entire two and a half days.

David Keighley, executive director of Newsworld, said next year there will be fewer conference sessions and the exhibition area



Lack: talent before technology



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ITV DENIES BUDGET CUT

Britain's ITV took the unusual step of issuing a statement denying an implication in a newspaper report that it plans to cut its \$1 billion program budget. A report in *The Financial Times* on November 10 claimed that ITV, which has seen a slowdown in ad revenue and will face competition from Channel Five from the beginning of 1997, was planning to cut its program costs by as much as a third. The newspaper quoted ITV Association director Barry Cox: "We are going to squeeze our suppliers... if they don't like the prices then they won't get commissioned." The ITV Network Centre statement quoted Leslie Hill, chairman of the ITV Council, saying: "The 1996 budget is almost £690 million (\$1.1 billion) – a significant increase in real terms on 1995... suggestions that ITV is likely to cut its budget in real terms are completely incorrect."



Hill: not cutting

will be moved closer to the conference rooms. Keighley expected "much greater numbers" of delegates next year.

He also insisted the event had value as a venue for program sales. "There is no market for news people. The potential for it to grow is huge. Once people hear what a success it's been this will become the Mip of the news world."

by Tim Westcott – BERLIN

ITALY

Pay-TV Change Spurs Soccer War

Govt opens up pay-tv competition, causing scramble for rights

New legislation opening up pay-tv competition in Italy – until now a one-horse race – has concentrated minds on who will own the rights to screen one of the country's major obsessions – soccer.

Under the law approved by the Lamberto Dini-led government at the end of October, all tv broadcasters already operating will have the right to launch pay operations terrestrially or via satellite – with immediate effect.

The battle will be decided on satellite, however, since an earlier ruling will oblige the current pay-tv operator Telepiù, and any others who enter the race, to move on to satellite by September 1997.

Telepiù has already announced plans to launch a package of channels from Eutelsat. State broadcaster Rai will need further legislation to launch pay services – which is likely to be included in the sweeping reform of the broadcasting law due next year. Vittorio Cecchi Gori's newborn tv group also appears eager to enter the new sector, possibly with backing from foreign groups like News Corp. or Cap. Cities/ABC.

But once the legislative obstacles have been removed, the problem of content is still there. And content in Italy means movies and soccer. Pay-rights for movies will be acquired on the international markets, just as they always have been for terrestrial television, say analysts, adding that the offer of films and good fiction, even if not endless, is quite wide.

But soccer means Italian soccer. And already the battle to control rights to the matches of the leading clubs – the *Guerra del Calcio* (Soccer War), as the Italian press has dubbed it – has flared up. Telepiù, backed by its shareholders Nethold, the Kirch group and Fininvest, is one of many groups rumored to be in negotiation with the Italian league. If it's still unclear which one will end up with the prize, the fee paid is likely

to be much larger than the amounts paid by Telepiù and Rai up to now. One bid on the table is reportedly worth \$500 million for one season alone.

The League, pleasantly surprised by its new appeal, has postponed its decision on the sale of the 1996-97 championship from November to next Spring.

by Cecilia Zecchinelli – MILAN

SPAIN

Antena 3 TV In The Black

Spain's ratings leader turns a profit while rival Tele 5 finds a buyer

With their balance sheets smothered in red ink, Spain's commercial broadcasters have not been a very attractive investment since television was liberalized five years ago. But after taking the lead in programming, Antena 3 TV is predicting it will take the lead in profitability too.

Pre-tax profit for this year will be Ptas 5 billion (\$40 million), according to Javier Gimeno, chief executive officer of the private station, which has been the audience leader for two months in a row (September and October) for the first time ever. Gimeno predicted total sales of \$584 million, operating costs of \$352 million, and operating income of \$128 million, of which \$88 million would go to provisions and debt servicing.

So far the only Spanish tv station making money (and at an ever-increasing rate) in this otherwise disaster-strewn panorama, has been the pay-tv channel, Canal Plus España. Last year its profits stood at \$36 million, while Antena 3 and Telecinco recorded losses of \$42 million, and \$19 million respectively.

Public broadcaster RTVE amassed debts of Ptas 300 billion (\$2.4 billion), and received \$2.23 billion in state subsidies in 1994.

Meanwhile, after cost-cutting and falling audience ratings, Telecinco has finally found a solution to its financial problems, at least in the short term, by reaching an agreement with Grupo Correo, the Spanish regional press group, to sell a 25% stake in the station owned by La Once, and parked hitherto in a Luxembourg bank.

Newspaper reports put the price agreed at between \$96 million and \$112 million for the stake. The total value of Tele Cinco has been set at \$440 million in the deal, according to the reports – \$32 million more than was offered by its previous most interested potential buyer, Mexico's Televisa.

by Justin Webster – BARCELONA

TOP CHAT

Top Cat is coming back to life, this time as a real-time animation. Filming has just been completed on a 20-episode series featuring the streetwise Hanna Barbera feline which is destined for Turner Broadcasting's international Cartoon Networks. Taking the concept of computer animated HB character Moxie one stage further, the series will feature Top Cat interviewing and interacting with a series of real-life guests. Top Cat is played by an actor standing just out of picture wearing electronic nodes which are then picked up and animated on Silicon Graphics Onyx computers. Hanna Barbera hired Swedish production company Trash TV, part of the Modern Times Group, to create the animation.

BROADCASTING

NBC And ZDF Agree To Share News

NBC News and German public broadcaster ZDF are to share newsgathering resources. The agreement, which was due to be signed by NBC president Robert Wright and ZDF director-general Dieter Stolte last month, calls for the two organizations to "co-operate in planning and co-ordinating their coverage of international news events." NBC News and ZDF will have access to each others' domestic and international bureaus and the U.S. network will move its German bureau from Frankfurt to ZDF's headquarters in Mainz.

CBC Forced To Cut Deeper

The Canadian Broadcasting Corporation (CBC) faces a Can\$100 million (\$77 million) shortfall at the end of its financial year next April unless it can slash its billion-dollar operating budget by \$270 million. CBC president Perrin Beatty believes he can deliver \$190 million of cuts – imposed by the federal government – by cutting staff, vice-presidents and programming, and selling off its Ottawa headquarters. The task has been complicated by inflation, increased taxes and the cost of severance pay for laid-off workers which were not taken into account when the present round of cuts were planned.

Quebecois Broadcasters Swap Assets

Montreal-based cable operator Le Groupe Vidéotron Ltée wants to exchange its stake in TVA broadcast network with cable interests owned by CFCF Inc. The asset swap would dramatically change the broadcasting industry in Quebec, with CFCF becoming the largest broadcaster in the French-speaking province, operating competing stations in both Montreal and Quebec City. But although CFCF directors clearly favour a deal with Videotron, Cogeco Cable Inc., which owns 9.5% of CFCF, has mounted an offer for CFCF, and even if the swap does take place it would face tough regulatory scrutiny.

BUSINESS

Pearson TV Closes ACI Purchase

UK media group Pearson has added ACI to its growing stable of television interests in a deal worth over \$40 million. Pearson paid \$24.5 million in cash and loan notes for the shares of the Los Angeles-based distributor and agreed to pay the eight ACI producers and other key employees an additional \$20 million over seven years. They have agreed to use ACI as their exclusive distributor of tv movies for at least the next five years. ACI derives half its revenues from non-U.S. sales of tv movies and the remainder from sales to U.S. broadcasters. ACI supplies a fifth of tv movies to the Big Three U.S. networks.

Televisa Plans Ahead

Mexico's commercial broadcaster Televisa said it had received advance advertising commitments from 1996 which put it fractionally ahead on 1995 revenue. Under the so-called "French Plan," the giant commercial station sells space to advertisers in advance for a cash deposit and a short-term obligation to buy a minimum of ad spots. French plan deposits at November 15 were approximately NP 4.024 billion (\$574 million) which, adjusting for 45.7% annual inflation, was up 0.3% on 1995.

PEOPLE

Jordan Replaces Vesey At CNNI

Peter Vesey, head of CNN International, is leaving the all-news network when his contract runs out at the end of the year to start his own consultancy business. Eason Jordan, head of newsgathering, will assume Vesey's responsibilities. Vesey, who has been at CNN for 16 years, said he would continue to specialize in the field of international tv news and intended to continue advising CNNI among other clients.

SATELLITE

Launch Date Set For New Asiasat

The much-delayed Asiasat 2 satellite was finally set to launch on November 28 from the Xichang satellite launch site in southwest China. The powerful satellite, with a pan-Asian footprint, will provide Star TV with its first major entry into the Asian pay-tv market. The pan-Asian broadcaster has booked between six and eight transponders, from which it intends to broadcast some 30 digitally compressed channels, in the form of localized packages for different countries. Other broadcasters set to use the satellite include Germany's Deutsche Welle, Portugal's RTPi International TV and news agencies APTV and WTN.

DirecTV Notches Up One Million Subs

Claiming to be the fastest-growing phenomenon in U.S. consumer electronics history, the digital direct-to-home service DirecTV said it had passed the one million subscriber mark on November 2. Launched in June 1994, DirecTV transmits 175 digital channels to subscribers who have an 18-inch dish. The company, a unit of Hughes Electronics Corp., is now in the top ten multiple system operators in the U.S.



The first all-digital Astra and Eutelsat satellites are already in orbit far over Europe, and hundreds of millions of dollars have been spent on technical preparations for the new era of 100 channels and more.

But now, with the digital wonder-world just around the corner, there is one major source of uncertainty left: How to fill all those channels – and at what prices?

Part of the answers, of course, is clear: The content will have to be attractive product from the place it has always come, Hollywood.

The digital market will be a seller's market out of all proportion to anything known in the analog past. But not even the sellers really know how much their treasures will be worth in the new environment. After all, television at the digital threshold is in another Zero Hour situation, as if the business were beginning all over again.

Nobody knows how the public will take to the plethora of new pay programs.

While most agree that there is much money to be made in the digital pay market place, just how much is an open question. There appears to be agreement on the point that the new pay services envisaged need new licences, even if the studios do not know their value.

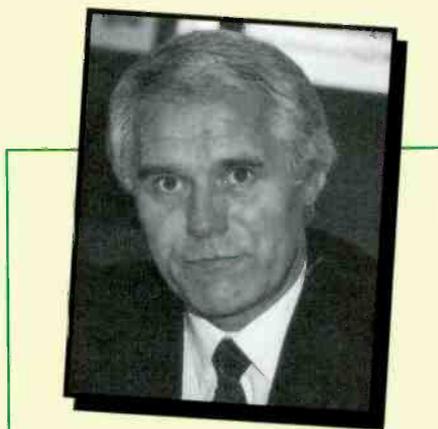
The respective reactions on either side of the market barricades are characteristic. The sellers, the major studios, are shy as a bride when it comes to licensing their output for digital distribution. Accordingly, the buyers are wooing Hollywood more eagerly than ever before.

A typical example of this type of courting was the rights deal RTL managing director Helmut Thoma signed with Warner Bros International Television Distribution (WBITD) in September.

For \$240 million, Thoma acquired the rights to 46 Warner Bros feature films, 75 tv movies and 60 specials, in all 500 hours of product.

The films include hits like *Batman Forever*, *The Firm*, *Dennis the Menace* and *The Fugitive*. Sounds good – but overpriced. Even Warner's long-standing partner in the German-language market,

How Far Will They Go?



BY WILFRED AHRENS

the Kirch Group, bowed out. Why? Because Warner sold only free tv or pay-per-view rights, and for a period of only three years at that.

Thoma in turn hailed the deal as "a foundation for a long term co-operation," a remark making sense when keeping the digital future and its program devouring character in mind. Thus, the heavy RTL/Warner price clearly included a sizeable goodwill bonus in this respect.

While neither RTL nor anybody in the business is openly discussing what is going on behind the scenes of Hollywood deal-making, it is an open secret that hectic negotiations have been going on. And, with the German market – potentially the most lucrative of them all – in view, competitors like Canal Plus/Bertelsmann, Kirch Group and CLT are determined to come out on top.

While their seller's position is as

strong as it can be, the Hollywood majors still have to tangle with the question whether or not to go it alone in Europe. Some of them, including Disney, Time Warner, Viacom and News Corp, already have footholds – of varying degrees of importance – in German broadcasting.

With the drastic deregulation of German television due to take place some time in 1996, with any organization permitted to own a network outright, provided it doesn't exceed a 30% market share, the temptation may be greater for the transatlantic giants to set up shop independently.

But then, the catchword in the digital world is program packages, or as the Francophone people of CLT/RTL are apt to say, "bouquets". A single-channel enterprise, even if it is operated or backed by one of the American majors, would eventually be forced into alliances with one or more of the locals controlling the evolving decoder infrastructure and, what is more, the conditional access (CA) gateway to it.

When the ongoing CA war is decided – with the Kirch Group and Nethold with their Irdeto system on one side and the MMBG consortium and its chosen Seca system made by Canal Plus and Bertelsmann on the other – the cards can and will be dealt out anew. Then the real poker game between the powerful software sellers and the channel owners in need of content can begin.

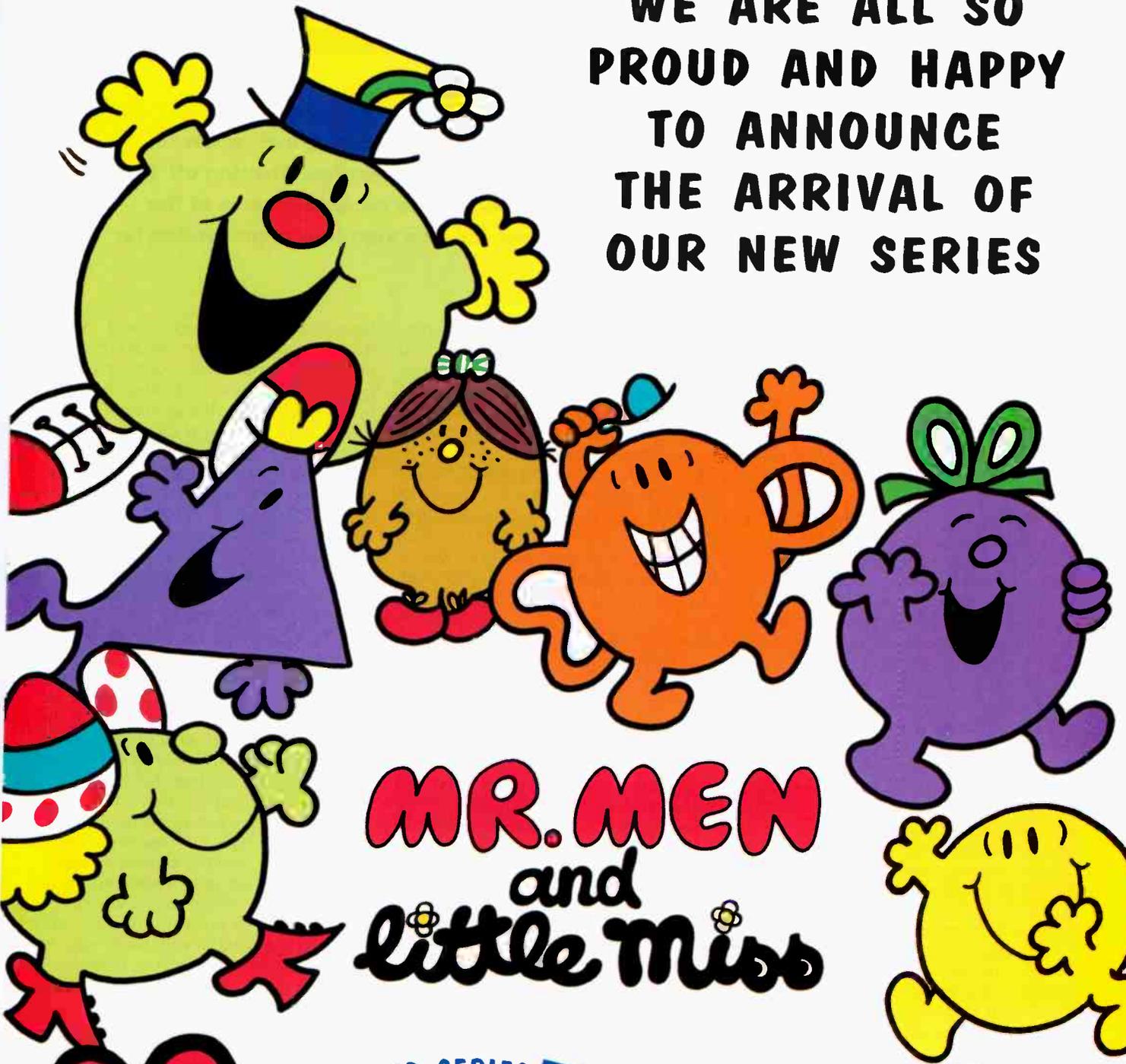
Its outcome may be open. The prices and/or barter conditions of possible partnerships across the Atlantic may so far be unknown.

But as things go in the real world of this fantastic business, the market will eventually regulate everything, at least to the satisfaction of the people who count most: the viewers.

Until then, the informed professional audiences watching the big players in the field can be assured of great entertainment. 

The sellers are shy as a bride about licensing their output. Accordingly, the buyers are wooing Hollywood more eagerly than ever before

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With 40 million tv households, Japan is Asia's most attractive market, but imported programs have been few and far between on the networks' schedules. Starting off TBI's focus on the Asia Pacific, Mark Schilling looks at whether the recent success of the X-Files and Major League baseball are just the latest fad or a sign that opportunities for distributors are opening up

Japan has long been a tough sell for foreign program suppliers. Although older viewers still hum the theme song to *Rawhide* and reminisce fondly about the comedic talents of Elizabeth (Bewitched) Montgomery, in past decades foreign shows have been conspicuous by their absence on terrestrial tv, particularly in prime time. And when they do manage to get on the schedule they seldom last long; even *Dallas* failed to find an audience in Japan – its only such flop worldwide.

But despite this and other dismal precedents, foreign program sellers keep trying and, in recent months, Japanese networks have been buying. Also, with the growth of cable and satellite tv, the entry of new satellite service providers, and the relaxation of government regulations, new markets have been opening up for foreign programming. What was once a trickle may soon become a flood.

Leading the foreign invasion is *The X-Files*. TV Asahi, one of Japan's five major commercial nets, began broadcasting the U.S. cult sensation on November 22 in an 8 pm slot – its first imported prime-time series in eight years, since a failed experiment with *Night Rider*.

One reason TV Asahi was willing to take the plunge is huge success of *The X-Files* in the video shops: 200,000 cassettes sold in a market where sales of 10,000 is an indication of hit status.

Another is an ongoing boom in books, films and tv shows with supernatural themes. One such book series, the six-volume *Gakko no Kaidan* ("School Ghost Stories") has sold more than one million copies and inspired a hit domestic movie of the same title.

Still another is TV Asahi's belief in the show's wide appeal. "This is a show that everyone from children to middle-aged adults can enjoy," said TV Asahi film department general manager Kazuo Marui. "It's a big-budget production with a quality comparable to that of feature films. It's got a realism that we think viewers will find absorbing."

To reduce the odds on what it still regards as a major gamble, TV Asahi is mounting an unusually extensive promotional campaign for *The X-Files*. In November the network staged a convention in Tokyo that featured screenings of episodes not yet released on video and appearances by celebrity fans of the series. Also, in co-operation with publishers and travel agencies, it has been issuing Japanese translations of *The X-Files* books and planning an *X-Files* Mystery Tour to the show's locations.

Another recent sensation that has resulted in a programming slot for a foreign import is Hideo Nomo, the local boy who made good pitching for the Los Angeles Dodgers last season. Viewership of NHK's satellite broadcasts of Major

League baseball games soared, while NHK general channel viewers complained that the satellite channels were getting all the good stuff. Also, Fuji TV's broadcast of the All-Star Game, which Nomo won for the National League, scored a 20.8% rating.

To make sure that all viewers get to see Nomo next season, NHK, together with TBS and Fuji TV, will broadcast Major League games, including the All-Star Game, league championships and the World Series, on a rotating basis, with NHK taking games in June and September, TBS in May and August and Fuji TV in April and July. This three-way arrangement will continue for the next three seasons, with further rotations scheduled for the 1997 and 1998 seasons. The estimated cost per season will be from \$6 million to \$8 million, borne equally by the three partners. "We're doing this knowing that there is a considerable risk involved. If Nomo fails to do well, viewers will not tune in," said Takashi Noda, Fuji TV's Sports Business Promotion Department general manager. "To be frank, we don't expect to make money on these broadcasts in any case – we will have to pre-empt regular programs for them and it will not be easy to make up the loss in sponsors' revenues – but we believe they will enhance our image as a network."

Far from representing a growing trend, *The X-Files* and Major League Baseball broadcasts are exceptions to the general wariness toward foreign programming among the major commercial networks. The few regular foreign shows usually air in the wee hours of the morning and co-productions with foreign partners remain few and far between. "Foreign shows just don't draw high rat-

Out There, Somewhere



Weird Scene: video sales propelled The X Files onto TV Asahi

ings, and as a commercial network, we have to take a market-oriented approach," explained NTV's Shinichiro Takeda. Other than the occasional Hollywood movie, NTV currently has no foreign programming on its schedule.

On terrestrial tv, the two main markets remain Japan's largest broadcaster, NHK, and its smallest commercial network, TV Tokyo, with five affiliates. In addition to setting aside several slots for foreign films, including a prime-time movie showcase, and broadcasting the U.S. series *Secret Service* in an early morning time period, TV Tokyo recently launched a new documentary series, *Lost Civilizations*, produced by Time-Life. Together with Fujitsu, TV Tokyo contributed a share of the series' \$15 million production cost in exchange for all Japan rights. "It's a different type of documentary that uses computer graphics to give viewers a sense of what these civilizations looked like at their peaks," said Mitsuko Sekiya of TV Tokyo's International Department.

In addition to broadcasting 10 installments, one a month, in an afternoon time slot, TV Tokyo plans to exploit the series in a variety of media, including books, videos, and, in co-operation with co-production partner Fujitsu, CD-Rom software. "We would also like to sell the series to cable and broadcast satellite and send it over the Internet," said Sekiya. "This is our first co-production of this type. We hope to do more in the future."

Another foreign company that has established a strong relationship with TV Tokyo is Netherlands-based Primation, an animation house that is now part of the Mitsui Group. Formerly known as

Telescreen Distribution and Licensing, Primation has sold several of its animated series to the network, including *Oxtails*, *In Moomin Land*, and *Domo*. The ideas for these series were developed in the Netherlands, with TV Tokyo serving as co-production partner.

Over the years, said Primation managing director Sjoerd Raemakers, the company's strategy has evolved from making programs exclusively for Japan, including the first *Moomin* series in the late 1960s, to producing for the global market. "Mitsui has offices all over world," explained Raemakers. "We can sell our shows not only in Japan, but Europe and the United States - it's a big advantage."

With Mitsui as a co-production partner Primation is currently making *Bamboo Bears*, a 52-episode eco-adventure series that introduces viewers to a new animal character every week, usually from a rare or endangered species, and takes them on a trip around the globe. "Our prime market is Japan and Asia, but the show has a truly international appeal," said Raemakers.

Despite the efforts of TV Tokyo to add an international flavor to its line-up, NHK remains by far the biggest programmer of imported shows. In 1994, it broadcast more than 1,000 foreign programs, of which 300 were dramas. Nearly 60% were shown on the two NHK satellite channels, the remainder on the NHK general and educational channels. "Often, we use satellite as a way of test marketing a program," said NHK International Public Relations director Yasutoshi Onoki. "If it does well, we will show it on one of the terrestrial channels." One example is *Beverly Hills*



Eco-adventure from Mitsui and Telescreen

90210, which became a hit on satellite, then moved over to the general channel. A new candidate for a general channel slot is *ER*, which NHK will launch on Satellite Channel Two next spring.

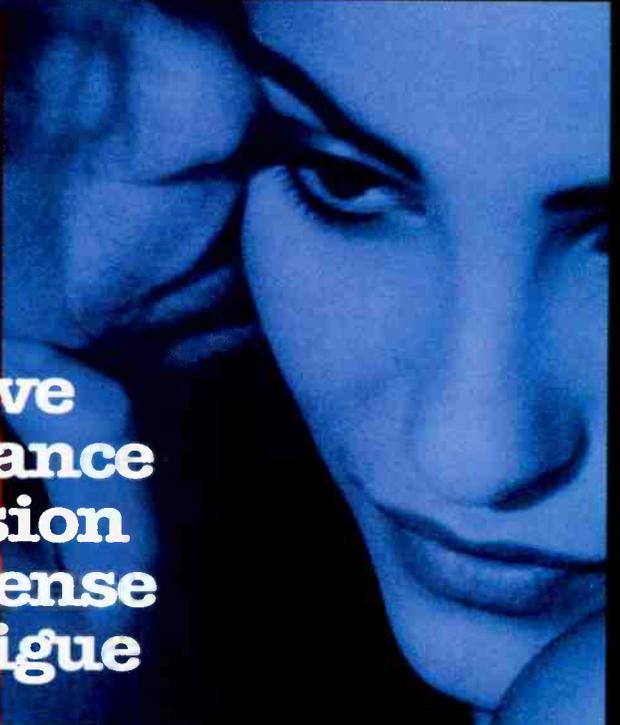
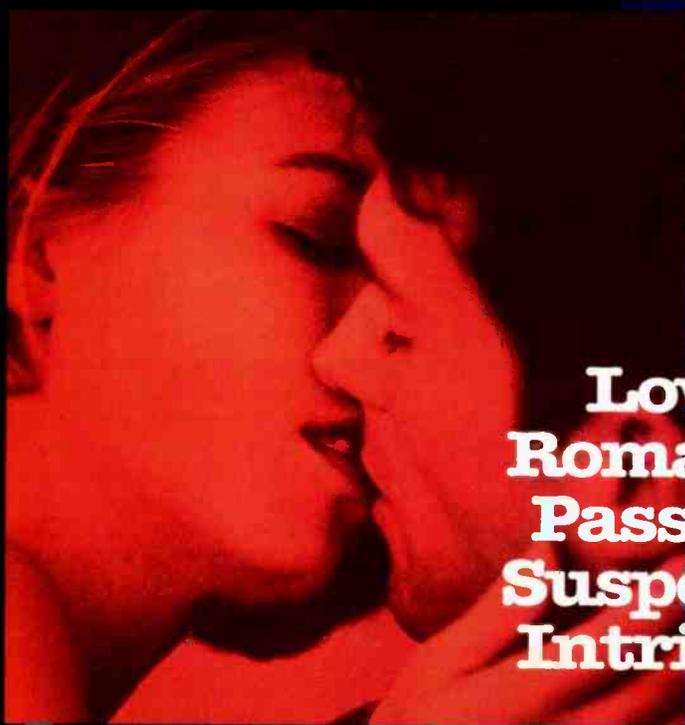
NHK's criteria for purchasing programs, Onoki admitted, may sound contradictory. "On one hand, we have to respect the opinion of the majority of our viewers and give them what they want to watch. On the other hand, as a public broadcaster, we have a mission to contribute to the betterment of Japanese society and culture. Sometimes there is a conflict." NHK tries to resolve the conflict by broadcasting a wide range of foreign programming, from operas to *Little House On the Prairie*.

NHK is also by far the Japanese TV industry's leading co-producer of programs with foreign partners. In 1994 the total budget for foreign co-productions was about \$97 million, of which NHK contributed two-thirds. That year, 190 co-produced programs and 44 titles were broadcast, one-third of which had been made with U.S. partners. European broadcasters accounted for most of the remainder. "In Europe, especially, there are many public broadcasters," said Onoki. "We find it easier to co-operate with them because we both have the same basic broadcasting policy. The major U.S. networks, however, have little interest in documentaries, which is one of our strengths."

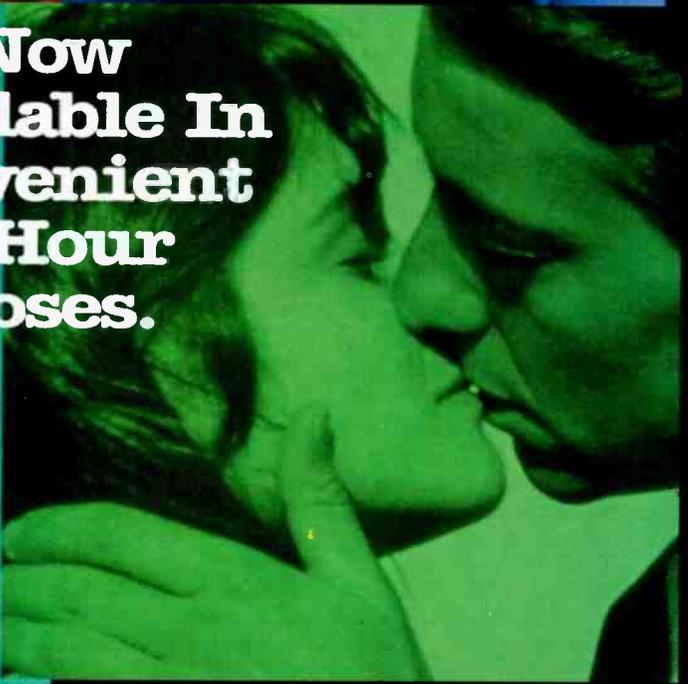
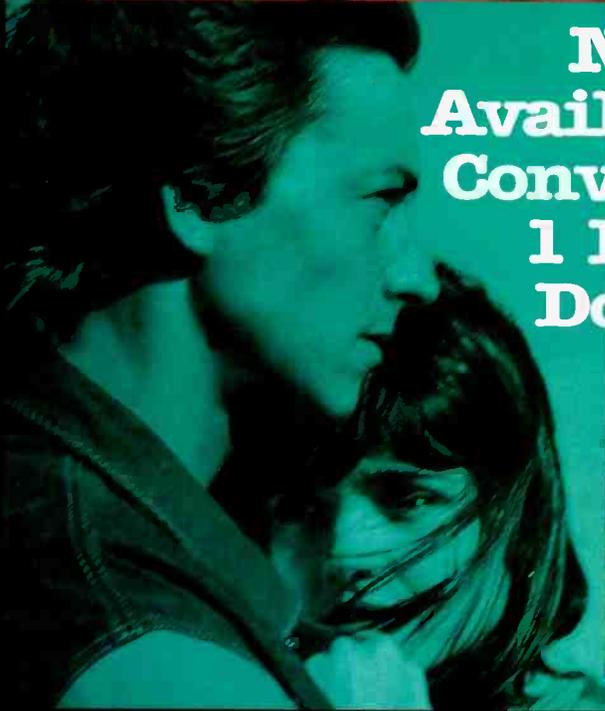
In deciding whether to do a co-production with a foreign partner, NHK asks itself four questions, said Onoki. The first is whether the project allows NHK to use its program production know-how. The second is whether it will enable NHK to develop new know-how (*Ed and Haru*, a documentary on former U.S. ambassador to Japan Edward Reischauer and his Japanese wife Haru, "gave NHK a chance to learn Hollywood production techniques," said Onoki). The third is whether the project's budget is large



Over the wall: *Lost Civilizations* sold to Fujitsu and TV Tokyo

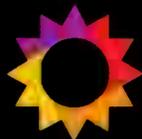


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enough to make risk sharing necessary. The fourth is whether the nature of the project requires local involvement. If the answer to only one question is yes, NHK will consider co-production.

Though the chance of scoring with Japan's 40 million television households may be bigger on terrestrial tv, the window of opportunity most open to foreign programs is cable and satellite competition. All of the three broadcast satellite channels – two for NHK and one for pay station Wowow – and several of the 11 communications satellite channels rely on foreign suppliers for the majority of their programming. Among the foreign-supplied CS channels are BBC World, CNN International, MTV and Sports 1, which sources much of its programming from ESPN.

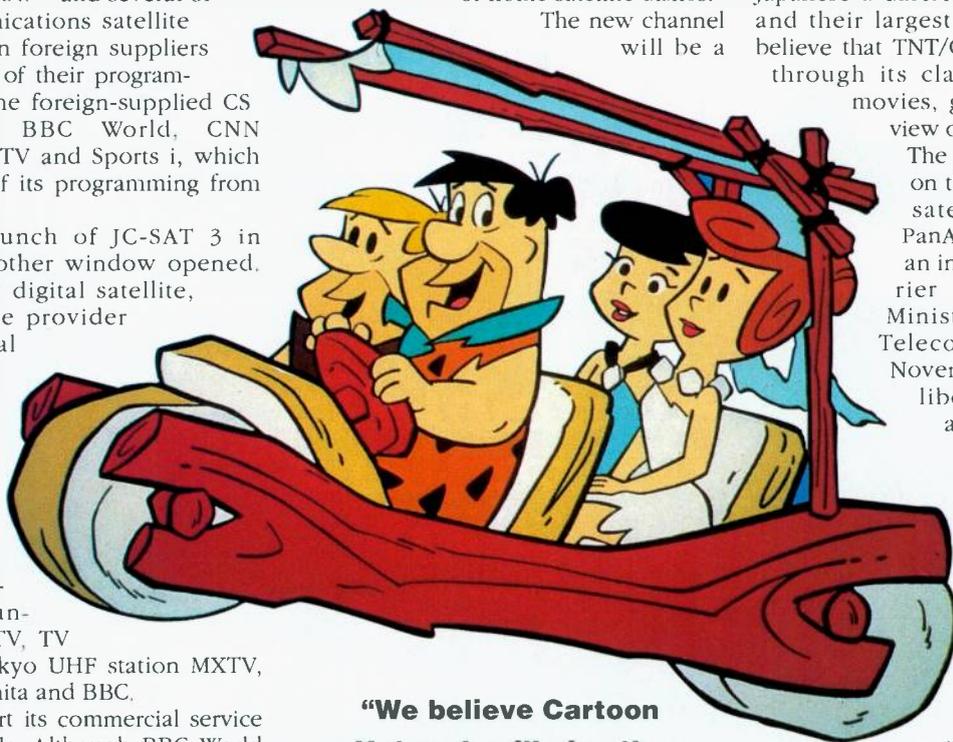
With the launch of JC-SAT 3 in August, yet another window opened. Using this new digital satellite, channel service provider DMC (Digital Multi Channel) plans to offer 53 television and 100 audio channels, beginning in September 1996. The 39 companies supplying the channels include NTV, TV Tokyo, new Tokyo UHF station MXTV, Pioneer, Matsushita and BBC.

DMC will start its commercial service with 40 channels. Although BBC World Service, a Portuguese-language channel for Japanese-Brazilians and a Korean-language channel for Koreans living in Japan will be the only non-Japanese channel offerings, DMC main shareholders Itochu, Mitsui, Nissho Iwai and Sumitomo, together with major domestic film distributor Shochiku, are planning pay-per-view services that will feature foreign films.

Yet a bigger window in the works is the 100-channel service being planned by Directv Japan, a joint venture of Hughes Communications, Culture Communications Club, Dai Nippon Printing, and Space Communications Corporation. Directv plans to offer a 100-channel direct-to-home service in 1997, relying heavily on U.S. suppliers for its programming. Although the company has not yet drawn up its channel plan, a major feature of its service will be pay-per-view channels, with most of the films supplied by major Hollywood studios.

In addition to these Japan-based services, foreign program suppliers are also targeting the Japanese market from outside the country, via Asian satellites. Next April Hong-Kong-based Star TV will start a Japanese-language pay channel offering movies, sports, music and other entertainment programming. The channel will beam its programs 24 hours a day aboard the Asiasat 2 satellite, which was scheduled for launch last month. Viewers will receive the channel via either cable or home satellite dishes.

The new channel will be a



"We believe Cartoon Network will give the Japanese a different view of American culture"

re-edit of Star's five channels, dubbed and subtitled in Japanese. Test broadcasts will begin in January and, following the approval of Star's broadcasting license application by the Japanese telecoms ministry, full-scale commercial broadcasts will start in April. If they prove successful, Star intends to expand its Japanese-language broadcasts to five channels.

Also, Turner Broadcasting System has received permission from the Ministry of Posts and Telecommunications to beam its TNT/ Cartoon Network to Japan via the Apstar 1 satellite. Launched in the Asian region in October 1994, the channel offers movies and cartoons from the Turner library 24 hours a day. According to Turner International Asia Pacific president Ted McFarland, Japanese cable

operators who viewed the channel's lineup at the Japan Cable TV Show in October "were surprisingly friendly to and familiar with" Cartoon Network stars Yogi Bear, The Flintstones and Tom and Jerry.

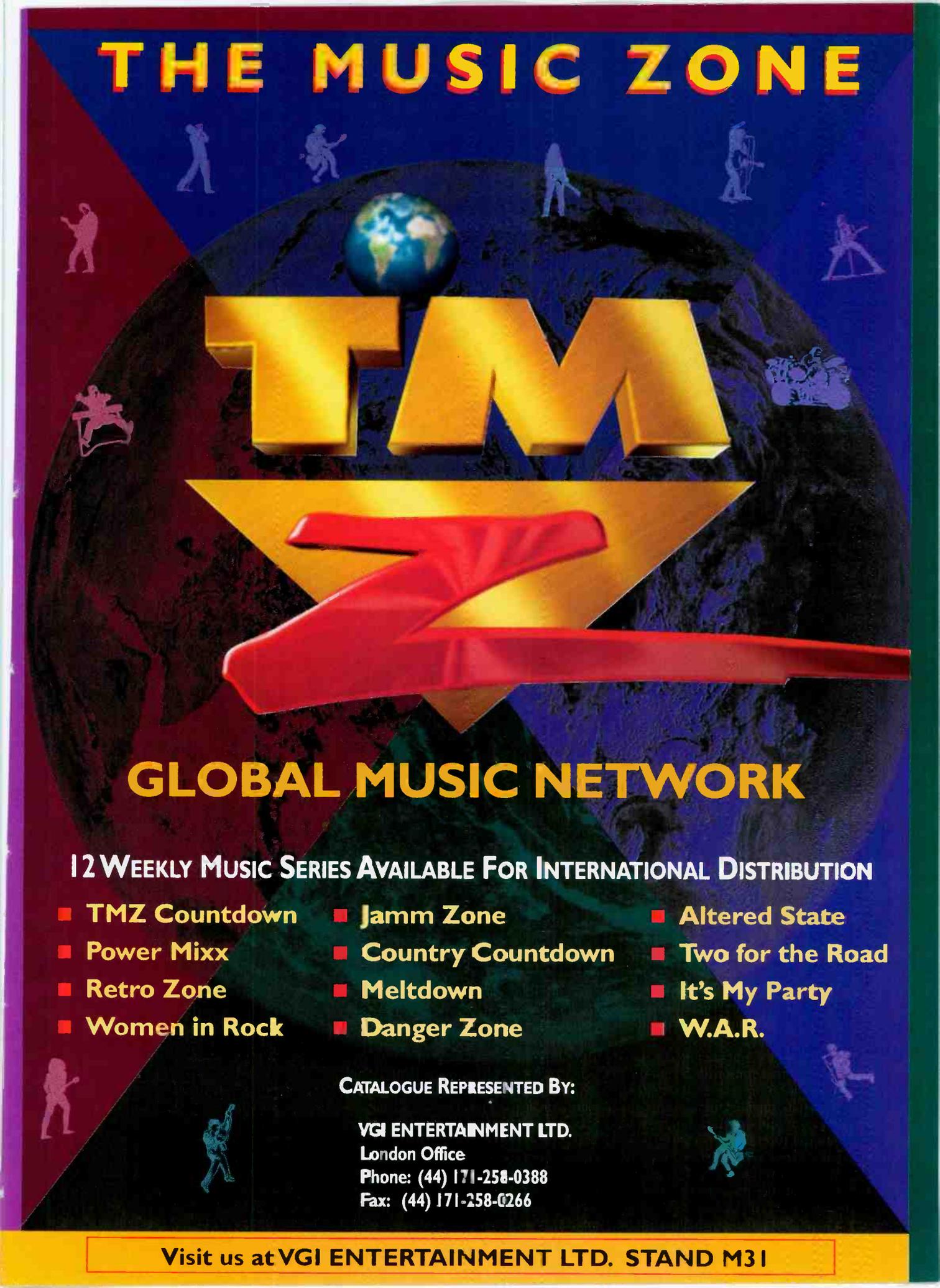
So far, however, Turner has not contracted with any cable operators to receive the service. "We are still in the process of creating brand awareness," said McFarland. "Just as CNN's menu of U.S. and international news gives Japanese a different view on the world and their largest trading partner, we believe that TNT/ Cartoon Network will, through its classic animation and movies, give them a different view of American culture."

The newest foreign arrival on the Japanese cable and satellite scene is PanAmSat, which received an international Type I carrier license from the Ministry of Posts and Telecommunications in November. A result of the liberalization policy adopted by the MPT last year aimed at opening the international satellite market in Japan, the license will make PanAmSat the first non-Japanese company to offer worldwide satellite services to and from Japan. PanAmSat will start its Japanese operations by transmitting the

APEC (Asia-Pacific Economic Co-operation) meetings held in Osaka in November. It plans to open an earth station in Tokyo in the near future and offer data communications as well as broadcasting services via its three satellites now in orbit and the five more that it plans to launch in 1997.

Even if *The X-Files* scores a hit and *Nomo* plays a whole season, the Japanese market will doubtless remain difficult, especially the commercial nets. Cable and satellite, however, promise to be a different story. "Now that viewers know what's out there, they aren't satisfied any more with conventional tv," said Kleinwort Benson International media analyst Nanako Sakaguchi. "Cable and satellite broadcasters are offering more shows that viewers want to watch." And many of those shows, she might have added, do not have a Made In Japan label. **IBJ**

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Commercially-Minded

Made in India: Moonstone's feature *Jungle Boy*

The rash of new channels launching in India has dramatically expanded the horizons for the country's independent producers. As befits a country whose film industry's output is second only to Hollywood, tv production is booming as more alternatives to the state broadcaster Doordarshan (DD) take to the air.

Now everyone, from film stars and film directors, to advertising agencies, business houses, journalists, newspaper barons and foreign producers, distributors and broadcasters are jumping onto the tv bandwagon.

According to Harish Thawani, executive director of indie producer Nimbus Communications, demand for first-run commercial program in India's main language, Hindi, has shot up from four to five hours a week three years ago to an anticipated 200 hours in 1995 and 1996 more than 300 hours.

Partly this is a factor of the explosion

DD's unique system of bartering airtime to program suppliers has made production a highly profitable business for India's flourishing independent sector, reports Anil Wanvari

of broadcasting outlets. DD, which has not stayed still as competition from satellite tv has intensified, now operates a total of 19 channels: three terrestrial, 14 regional and two via satellite. DD's programming output now exceeds 1300 hours a week, up from just 500 hours in 1992. The major contributor to this is its principal service, DD1, with 533 hours.

Satellite, which now reaches 13-15 million tv homes out of a total 48 million, is the distribution medium for a number of channels, notably Zee TV, India TV, EL TV, ATN, Jain TV and Sony Entertainment Television, launched last month.

Another factor in the increase in DD's output and in new satellite channels is

the diversity of languages and dialects spoken in India. According to Thawani, demand for programming in Tamil, Telugu, Kannada, Malayalam, Gujarati and Bengali has gone up "dramatically" from four to five hours a week in 1992. Demand for programs in the southern Indian language of Tamil is now up to 150 hours a week.

DD's output on regional language channels is 426 hours, and DD2, otherwise known as the Metro channel, accounts for 117 hours per week.

This explosion in airtime represents a massive opportunity for independent producers, the more so because a large proportion of Doordarshan's programming is either commissioned out of

house or sourced from producers via a barter-type system DD defines as "sponsorship" (see table).

Doordarshan's public service vocation means it is happy to keep the business of selling commercial airtime at arm's length. It acquires half-hour or 45 minute slots of programming from producers in exchange for a fee and up to two minutes of commercial airtime. These spots are then sold on directly to advertisers or to agencies.

The producer pays a telecast fee ranging from \$7,000 for a primetime slot to as little as \$700, depending on the channel and the timeslot. In return the producer gets between 90 seconds (in primetime) and 150 seconds of free commercial time (FCT), which he is free to market to any advertiser at a price, dictated by the viewership of the program. DD also sells the remaining spots within the program segment and to protect itself it has been asking for minimum ratings guarantees from suppliers for popular timeslots.

Normally, producers approach DD with a concept for a program. The broadcaster often asks for a pilot of as many as four episodes. Once it has been cleared, DD then allocates a timeslot for the program. While some producers say the approval process can take two to three months, others say that it can even stretch to a year.

In most cases, producers retain the rights of the program. DD has worked out programming deals for soaps, song contests, game shows, teleshopping and sports. The daily segment of MTV which

practices, most of the major commercial players have not. With certain exceptions, Zee TV, EL TV, Sony, TV I and ATN prefer to acquire or commission their programming for cash and sell airtime themselves. They also retain more

Doordarshan: Sources Of Programming - Nov 95 (%)

	In-house	Sponsorship	Commissioned	Acquired - Foreign
DD1	50	30	17	3
DD2	10	75	15	10
Regional	80	15	5	-

Note: percentages vary marginally month-to-month Source: Doordarshan

of the rights. A quarter of Zee's programming is produced in-house, while for EL TV the figure is 30%. Sony has chosen to outsource all its programming other than library product from its affiliate, Columbia Tristar.

The arrival of satellite channels has driven down the cost of tv advertising and programming, according to EL TV chief Karuna Samtani.

There was a time when most producers used to quote about \$8,000 for a prime-time program to advertisers. This was based on the cost of the telecast fee on DD which would be about \$7,000 for a prime-time program and the cost of the FCT. If, say, 90 seconds were being sold at \$1,700 for a 10-second spot and all of the time was sold, the producer netted \$15,000. Some \$7,000 of this amount would then be paid to DD as telecast fee, with the remainder being used to fund production of the program and generate profits.

"Four years ago, DD had barely seven slots open to private producers. Advertisers had no choice and they paid the money thinking they were lucky to get their commercials onto tv as they were. Then we came along and commissioned producers to make programs for 50,000 to 120,000 rupees (\$1,400 to \$3,400) and sold the time ourselves at lower rates. This gave advertisers an option," said Samtani, "and in the process changed the way things worked."

Of course, the rapid growth of broadcasting in India has to be seen in the context of advertising revenue, which is expected to be \$390 million this financial year: Doordarshan's cut is forecast at \$185 to 215 million, with producers making \$71 million from ad sales and Zee TV a similar amount.

Not bad, but for a country of a billion souls, there is room for growth. Some feel that the true revolution may come later rather than sooner. 



Delhi calling: TV18's India Business Report

airs on DD2 and foreign feature films are also supplied on a barter basis.

Although the regional channels Sun TV and Gemini TV have adopted similar

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Empire Builders

Production budgets of \$20,000 are lavish by Indian standards. But India's tv conglomerates are pouring money into diversification. Anil Wanvari profiles some of the leading players

Plus Channel

The (confusingly named) Plus Channel has more than ten programs on DD: ranging from a daily business news show to two daily soaps (one in Hindi, the other in English).

Plus Channel chief Amit Khanna said the company focuses on DD as it is the dominant player, but it is also developing programs for SET, the planned Home Television and MTV. This apart, the production house is also interested in diversifying into programming in Bengali, Telugu, Tamil and Marathi.

Khanna is determined to build Plus Channel into "India's first entertainment conglomerate." The company is building studios in Bombay and Delhi via a private placement of \$20 million. It has also moved into music, cinema production (it has 14 films currently in the pipeline), event management and syndication.

Nimbus

Like many other companies, Nimbus has been nurtured by DD commissions. It started out by marketing airtime for a DD soap in 1987. Today, it has a highly successful chart show which is one of DD's five programs.

In addition to music and soaps, Nimbus has developed a line in sports, selling shows to DD and Prime Sports.

It is currently distributing a preview of this winter's cricket world cup tournament, shot in four countries. The program, which cost close \$20,000 an episode, has sold to four Indian and five overseas networks.

"Not all projects are so stiffly priced,"

Modi Entertainment Group

Lalit Modi's Modi Entertainment Group (MEG) has joint ventures with New World and Multimedia Enterprises to make soaps and talk shows for the Indian market. Currently Modi New World is believed to be on the lookout for properties to acquire and has a concept in place which it hopes will lead to a production soon.

It already airs New World soap *The Valley of the Dolls* on DD five days a week. Modi Multimedia, on the other hand, has gone beyond the concept stage and has already given a two-episode pilot for a talk show to DD's screening committee for clearance.

Modi has also forged a joint venture with Walt Disney Co.'s production arm Buena Vista which produces a daily animated segment on DD1.

UTV

Once UTV was just a production house for advertising films and corporate videos which used to dabble in tv programming for DD. Unlike both Nimbus and Plus, UTV actually made its mark with Zee TV. It started with game, chat, astrology, children's, and entertainment shows and a soap on the satellite network.

To date, UTV has produced 1,500 hours of programming, including more than half a dozen shows to DD. The highlight is DD's 520-episode daily afternoon soap, *Shanti*, which is showing in seven languages across the Asian region. With Grundy Productions, UTV co-produced a game show called *Kriket* for Star Plus which, although it lasted only 15 episodes, will come back for a second series, according to UTV director Ronnie Screwvala.

Part-owned by News Corp., UTV is expanding its portfolio of activities to cover everything from cinema to multimedia. Screwvala said UTV is likely have a public listing by the end of 1996.

said executive director Harish Thawani. "Those with stock music and shots can be priced as low as 125,000 rupees (\$3,600)." He sees the company becoming a supplier to several networks.

Next up is a private placement to investors, the money from which will be pumped into setting up a studio in Bombay.

TV 18

With revenues of about \$3.4 million, TV 18 is a minnow compared to the other players. Starting with two shows, *India Business Report* on BBC and lifestyle and culture weekly magazine *The India Show* on Star Plus, it has since ventured into gameshows, music countdowns and drama series for an array of channels like EL TV, Sony and DD3.

The buzz is that TV18 will be providing the pan-Asian satellite channel Asia Business News with a chunk of news programming and may even serve as a

partner for the channel's India-specific debut. E! Entertainment's vice-president for international development Jon Helmrich is in preliminary talks with TV 18's managing director Raghav Bahl which may lead to some co-production.

Mudra Videotec

Mudra Videotec, an offshoot of Mudra Communications, is a company trying to make a comeback into tv production. Mudra acquired foreign programming for DD in the eighties. But then it faded out. Today, the Ambanis and Mudra chairman A.G. Krishnamurthy are pumping in over \$4 million into Mudra Videotec, which will be targeting programming at southern Indian satellite channels and at DD. A \$1.4 million project on the mythological Lord Vishnu is in production.

Amritraj Solomon Communications

The company formed by tennis star turned movie mogul Ashok Amritraj and ex-Warner Bros executive Michael J Solomon has already cut an agreement with Sun TV to provide it with seven half-hour segments every week. Amritraj has plans to produce five mega-budget mythological and historical series, some of which will be telecast on DD.

Amritraj has earmarked an investment of \$20 million in the next few years to make his mark. He is on the verge of taking a 25% equity stake in Madras-based CTV, a company that has rights to Hanna Barbera films and to versions of *Mahabharata* and *Ramayana*.

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Going places: TVNZ's Natural History Unit is one of Japan's leading foreign suppliers

Kiwis Fly High

New Zealand is building a reputation for its locations, its talent pool and its creativity - particularly when it comes to making co-production work. Paul Smith reports

Necessity has been the mother of invention for the new generation of Kiwi producers. For years the country's location thousands of miles from the major tv industry centers of Europe and North America, combined with its 3.5 million population, made New Zealand a remote, insignificant player in the international production industry.

Not any more. A combination of the pioneering value of resourcefulness, deregulation of the tv industry, and the wide range of locations offered by the country, have combined to raise the profile of Kiwi production companies, particularly as partners in international co-productions.

Increasingly, overseas broadcasters shoot productions in the country or link with the production subsidiaries spawned by the commercially-active pubcaster Television New Zealand (TVNZ) to make them. The Natural History Unit, South Pacific Pictures, Kotuku Productions and Avalon Studios were all involved in new productions in November.

In that month alone, four Japanese broadcasters visited the South Island city of Dunedin to meet with the Natural History Unit, which is currently working on co-pros worth around NZ\$20 million (\$13.3 million).

South Pacific Pictures (SPP) is about

to start production on *Tales Of The South Seas*, a 22-part adventure series based on novels by Jack London. Its partners are France's Gaumont Television and Luxembourg's CLT.

Another CLT-backed series, *The Enid Blyton Adventure Package*, co-produced with British company Cloud 9 and Kotuku Productions, is part-way through filming 24 half-hour episodes. The series is the biggest-ever production to go through Avalon studios. Earlier, Avalon also made demos of a new game show, *Poker Palace*, for King World.

Part of the explanation for the current health of Kiwi production has to go to two Labour governments. In 1975,

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Labour introduced the first television competition between sister state broadcasters TV1 and TV2, which were then independent.

The Auckland-based TV2 had as its head of drama the Emmy award-winning Kiwi John McRae (*Anne of Green Gables*, *Ballet Shoes*) who had been lured back from the UK.

Backed by director-general Allan Martin, McRae began work on *Hunter's Gold*, one of the first co-productions, with Thames Television. It led to others with Australia and with the U.S.'s The Nashville Network on a music series, *That's Country*.

In 1989, and with Labour again in power, broadcasting was deregulated. State broadcasting had to survive on advertising revenue – and its wits. McRae went off to head South Pacific Pictures.

TVNZ's director of production, Tom Finlayson, explained: "We are a very, very small country and we have to leverage on what our real strengths are for co-pro partners. There is very good cost-effectiveness here – typically less than half of European costs." Crews are de-unionized and technically up to interna-



Barnett: creativity

tional standards.

Tom Parkinson – the founder of private network TV3 and the man who directed *Hunter's Gold* – agreed. "We have to do co-pros because quite simply we don't have budgets big enough. If we want to make drama or sitcoms we have to have overseas co-pros."

New Zealand does, however, offer more than mere cost-efficiency.

Said Finlayson: "We have a range of locations – from snow in some parts, to golden beaches and primeval forests." Apart from the locations, it's also an interesting place, he added, pointing to the dynamics of New Zealand's partly Polynesian culture.

Parkinson said producers "can do any location of any country within 20 minutes of Auckland." It's a slight exaggeration – it doesn't snow in Auckland, but it does only two and a half hours away. "The thing is that we have a very good road and motorway system and you can do three or four locations within one shooting day," he said.

The New Zealand climate is temperate, and one of its key virtues for producers, according to Finlayson, is the quality of its daylight and the length of daylight hours.

For SPP's managing director John Barnett, all the factors his colleagues list are important. But for him, there is one more critical than all the others – creativity. "The reason we have been successful in the past and in future plans is that we have generated ideas which have international cachet," he said.

"It's been our active philosophy to be more than just a location. It means we come up with an idea and then go out and find a co-production partner."

SPP's soap *Shortland Street*, one of the top-rated domestic programs, was sold to the UK's Carlton TV this year. SPP is now planning a series aimed at the twenty-something viewership called *Oriental Parade* which like *Melrose Place* deals with relationships of young apartment-dwellers.

SPP is now working on a series about the life of the painter Paul Gauguin with France's Ellipse. Its other major projects include a 65 by 30-minute children's series, *Riding High*, for Wendy Productions of Germany. South Pacific recently bought the rights to two popular Australian detective series: the Cliff Hardy books by

Peter Corris, and the Claudia Valentine novels by Marele Day.

TVNZ's Natural History unit, described by former CEO Julian Mounter as the web's "jewel in the crown" this year broke the 100-country sales mark with its range of documentaries. It is currently making 50 productions worth NZ\$20 million for a range of international companies.

"It's been another year of quite significant growth for us," said Michael Stedman, managing director of the Unit, adding that it is now the single largest international supplier into Japan through NHK.

The Japanese have virtually bought the entire Natural History catalog and the Unit is co-producing programs on penguins and sun bears with NHK. In addition it is producing six to 10 one-hour series on natural history topics with the Japanese broadcaster. The Unit has also established strong links with several American broadcasters.

Currently it is finishing off three one-hour specials for the Discovery Channel on subjects ranging from crocodiles to oceans and is co-producing a four-partner called *Chile, the Land of Extremes* with the network. Other one-hour specials include programs on rats and the Australian dingo. The Unit is also co-producing a series on penguins for



Stedman: growing

WNET for the PBS Nature series and is discussing three more films.

Other American customers include the Learning Channel and National Geographic TV. Stedman said he was having discussions with The Learning Channel for a four-partner on riches of the Earth. The Unit is working on a crocodile film with National Geographic and is discussing other projects with the company.

In Europe, the Unit and German film company Videal, which has invested in eight of its films, are now working on a joint project.

"It further strengthens our position in Germany, where we signed a major co-production with NDR for 16 films two years ago. That's now been extended into 24 films, so we continue to build our relationships in Germany." Stedman said there are now 65 staff in the Natural History Unit – more than double the figure two years ago. [E]



Family friendly: The Enid Blyton Adventures

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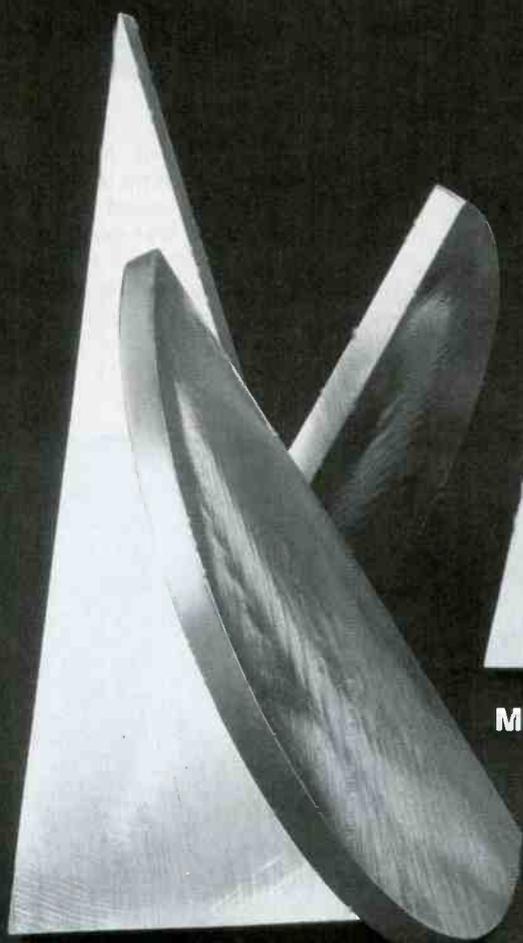
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TBI's Survey Of Imported Programs

Thirty broadcasters replied to TBI's first survey on imported programs in Asia and Australasia. Information on a further nine broadcasters was taken from the TBI Yearbook '96, which was published in October.

Perhaps the most interesting thing to note from the survey (aside from the fact that Benny Hill is proving very popular in Thailand), is that those countries with no local programming quotas are not necessarily the ones which acquire the most foreign product.

Japan, for instance, remains a notoriously difficult market to sell to, despite its lack of quotas for domestic programming. Of all the Japanese broadcasters surveyed, TBS reported the highest level of imported programming at just 7%, while Fuji TV claimed that it wasn't currently airing any imported programs on a regular basis.

Australia, on the other hand, has higher import levels than in many other countries but is introducing a complex quota system to foster domestic produc-

tion. As a result of the Australian Broadcasting Authority's new regulations (see footnotes), publicly-run ABC and the commercial networks Ten and Nine, all reported that they would be decreasing the level of foreign output.

Throughout the region, U.S. programming is by far the most popular import, with *The X-Files*, *Melrose Place* and *Beverly Hills 90210* all cropping up in several top fives. However, UK productions are more popular with the ABC and TVNZ, and several Asian programs transplant to other territories.

Imported programming levels are highest on the newer channels such as the pan-Asian satellite channel Star Plus and Thailand's IBC. However, these levels are likely to fall as the channels



Thai Life: Benny Hill

become more established. As Terence Wat, senior publicity director at Star Plus, explained: "the way forward is to start local programming." Wat does admit, though, that this won't be for some time yet. With new channels still launching in the region demand will remain high for foreign programs.

Country	Channel	Hrs/Week	Imported Programs (%)	Local Quotas	Increase/Decrease	Top Five Imported Programs
Australia	ABC	168	50%	See below	-5%	The Bill Absolutely Fabulous Mr Bean Keeping Up Appearances Fawlty Towers
	Network Ten	168	50%		-5%	The X Files Seinfeld The Simpsons The Nanny Mad About You
	Seven	168	48%		No change	Home Improvement Theatrical films British series American sit-coms
	Nine Network	168	40%		-5%	The Nanny Cybill The Simpsons Home Improvement Lois And Clark

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ASIA PACIFIC

Country	Channel	Hrs/Week	Imported Programs (%)	Local Quotas	Increase/Decrease	Top Five Imported Programs
China	CCTV*	600	15%	n/a	n/a	n/a
Hong Kong	ATV Home	163.2	29.3%	None	n/a	Judge Pao Romance Of Three Kingdoms Shinchan
	ATV World	143.25	40.3%	None	n/a	
	TVB Jade	167	11.1%	See below	Increase	Show By Shobai (Game Show) Gourmet Special - Shrimp (Documentary) The Ultimate Service In Cantonese Cuisine (Documentary) Japanese Inns (Documentary) Under One Roof (Drama Series)
	TVB Pearl	120	70%		No Change	Theatrical films Documentaries Drama Series
	Star Plus	168	98%	None	Decrease	Baywatch The X-Files Beverly Hills 90210 NYPD Blue Star Trek: The Next Generation
	CETV	168	67%	None	Decrease	Happy Times (Variety/Talk Show)
India	Doordarshan *	1,300	Ch1: 3% Ch2: 15%	n/a	n/a	n/a
	Zee TV	168	4%	None	Increase	n/a
Indonesia	RCTI	130	35%	65%	No change	U.S. action movies Chinese Kung Fu series and movies Indian movies America's Funniest Home Videos Renegade
	SCTV	147	60%	80%	+59 hrs/wk	Indian movies Telenovelas American Series
	TPI	132	39.2%	Plays, education, comedy, music	-20%	Indian movies Kungfu Master The Young Chan Sang Fong Drunken Fist Casper And Friends
Japan	TV Asahi	158	2%	None	Increase	The X-Files Movies
	Fuji TV	160	n/a	None	n/a	No imported programs currently broadcast regularly
	NHK	GTV:139 ETV:128	4.4% (Terrestrial)	None	No change	Little House On The Prairie Full House Dr Quinn Medicine Woman Blossom Beverly Hills 90210

ASIA PACIFIC

Country	Channel	Hrs/Week	Imported Programs (%)	Local Quotas	Increase/Decrease	Top Five Imported Programs
Malaysia	NTV	154	n/a	None	+1 hr/week	U.S. movies
	TBS	150	7%	None	No change	U.S. movies
	TV3	135	30%	80% (by Year 2000)	-10%	Hindi movies Chinese movies English movies English children's programs Chinese drama
New Zealand	TVNZ *	336	70%	n/a	n/a	Mr Bean ** Last Of The Summer wine Barrymore Great Railway Journeys The Nanny
	TV3	168	65%	None	No change	Melrose Place Home Improvement 20/20 Ellen Extreme
Pakistan	PTV	92	15%	85%	No change	Time Trax Star Trek Deep Space Nine Full House Dr Quinn Small Wonder
Philippines	STN *	168	55%	n/a	n/a	n/a
	ABS-CBN	125.5	15%	None	+25%	Mighty Morphin Power Rangers X-Men Baywatch Melrose Place Ninja Turtles
	RPN	168	80%	None	+4 hours	X-Files Rescue 911 McGyver Dragon Ball Picket Fences
Singapore	Channel 5	168	74%	13 hrs/week	Decrease	Indiana Jones & The Last Crusade Mighty Morphin Power Rangers Navy Seals Deadman Don't Die Nightmare On Elm Street
	Channel 8	168	52%	13 hrs/week	No change	Taichi Master Holy Weapon Master Wong v Master Wong Rosa Till Death We Start
	Prime 12 *	61	78%	n/a	n/a	n/a
	Premiere 12 *	71	98.5%	n/a	n/a	n/a

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Country	Channel	Hrs/Week	Imported Programs (%)	Local Quotas	Increase/Decrease	Top Five Imported Programs
South Korea	KBS TV1/TV2	98 Each	TV1: 3.2%, TV2: 14.5%	90% 85%	No change	Pao Ching Tien The X-Files Disney Cartoon Series Movies
	MBC	98	9%	85%	Increase	n/a
	SBS *	91.5	16%	n/a	n/a	n/a
Taiwan	CTS *	184	15%	n/a	n/a	n/a
	Taiwan TV Ent	160	17-18%	80% local	No change	McGyver Mission Impossible LA Law Murphy Brown NYPD Blue
	CTV	140	30%	70% local	n/a	Hong Kong movies ER Friends
Thailand	Channel 3 *	126	18.1%	n/a	n/a	n/a
	Channel 7	100	20%	None	No change	Animation Movies Sports Natural history News
	IBC	168	92%	None	Increase	Benny Hill Lung Ting Tsang PA (Hong Kong) Full House Year VIII When Things Get Tough (Hong Kong) Models Inc
Vietnam	VTV	110	50%	Children's, educational and special programming	n/a	Cartoons Sports News Movies Variety

* TBI Yearbook 96 figures ** Top 5 Imported Programs from July 1995 (Source: TVNZ Update August 1995)

Quotas

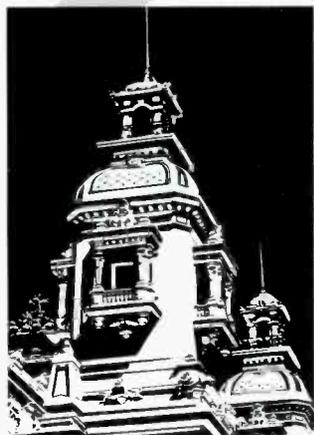
Australia

From 1996 the quota for domestically produced programming on the three commercial networks will rise to 50% (between 6am and midnight), and from January 1988 this will increase to 55%. The networks will also have to show 170 hours of first-run Australian drama in prime-time, at least 130 hours of first-run local children's programming, 32 hours of local children's drama (including up to eight hours of repeats), 10 hours of first-run documentaries and 130 hours of pre-school programming. The ABC operates a self-imposed quota of 50% locally-produced programming.

Hong Kong

While ATV claims that it does not have to comply with any quotas, rival commercial network TVB reports that it must adhere to the following guidelines:

- 2 comprehensive news bulletins/day (at least 30 mins)
- 1 documentary/week (at least 30 mins)
- At least 30 mins current affairs/week (2 programs)
- At least 30 mins children's programs/day (1 program)
- At least 15 mins art & culture/week (1 program)



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MARKET NEWS

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ANIMATION/CHILDREN'S

Animation from Nickelodeon, on the **MTV Networks** stand, includes new episodes of *Rocko's Modern Life*, starring a wallaby who



relocates to the U.S., *The Ren and Stimpy Show* and *Aaahh!!! Real Monsters*. Also on offer from the basic cable network are pre-school series

Allegra's Window and *Gullah Gullah Island* and the live action *Pete & Pete*, featuring two brothers' offbeat view on being a kid.

Nickelodeon is also hoping to sign up an Asian partner for its second series of kid's gameshow *Global Guts*. Kathleen Hricik, senior vice president, program enterprises, said: "We do have serious interest from quite a few countries."

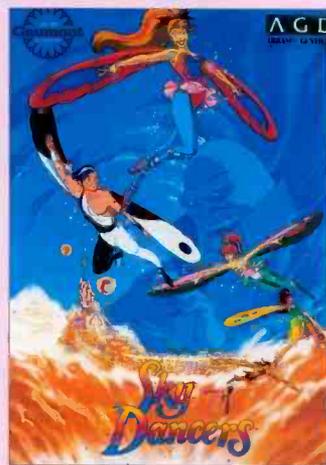
Hallmark Entertainment has two new animated offerings at Mip Asia. *Monster Mania*, a series of 26 half-hours, reveals the secret inhabitants that lie hidden in bedroom closets, while

Space Monkeys (13 half-hours) follows the adventures of a space-travelling chimp.

New product from **Turner International** includes 65 half-hour episodes of *Jonny Quest*, the first major new production by Hanna Barbera since its takeover by Turner Broadcasting. Also on offer are 13 new half-hour episodes of *Captain Planet*, the eco-friendly super hero, and two series based on the recent hit movies, *Dumb And Dumber* and *The Mask*.

Ninja Robots is a futuristic action/adventure series from **Westinghouse Broadcasting International**, following the adventures of Joe Maya and his Robot Warriors.

Gaumont Multimedia has three new animated series. *Sky Dancers*, *Dragonflyz* and



Home To Rent. Gaumont is also working on the second series of *Highlander*, *The Animated Series*.

Another computer generated series at Mip Asia is *ReBoot* from **Alliance Communications Corp.** The series is already a strong ratings performer on ABC in the U.S., and Alliance has 10 new half-hour episodes available.

Nine new episodes of *Phantom 2040*, based on the comic book character, are on offer from **Hearst Entertainment**. The series is into its second season in U.S. syndication, and Paramount Pictures has begun production on a feature film version.

Comic book superheroes also feature heavily in **New World Entertainment's** line up, which includes 65 new half-hour episodes of *Spider-Man*, and 26 one-hour episodes of *Marvel Action Hour*, featuring Iron Man and the Fantastic Four.

CTW Prepares Mandarin Sesame Street

The Children's Television Workshop (CTW) will have three areas of activity at Mip Asia, according to David Jacobs, regional vice president.

The kid's tv specialist will be continuing with straight program sales throughout the region, trying to conclude format sales for shows such as *Risky Numbers* and, in addition, looking for more opportunities to develop local adaptations of its flagship series *Sesame Street*.

CTW is currently working on a Mandarin-language adaptation of the show with Chinese broadcaster Shanghai TV.

The agreement, which took two years of discussions to come about, will see the two partners producing 130 30-minute episodes at a cost of between \$4 and \$5 million.

The production will begin early 1996 and will air mid-1997. It will be distributed throughout China and will most likely air daily in a late afternoon slot, with an as-yet unnamed sponsor.

As with all local adaptations of *Sesame Street*, the series will be based around a local curriculum which in this instance has been developed and designed by Chinese educational experts. There will also be a local street and puppets developed by CTW in conjunction with Shanghai Television.



Monthly Python star Terry Jones is the creator of *Blazing Dragons*, an epic story set in the time of King Arthur and the Knights of the Round Table. Commissioned by the UK's ITV network, the series is a co-production between Carlton TV and **Nelvana**.

Australia's unique landscapes and wildlife are the focus of two new series from **Beyond Distribution**. *Blinky Bill* is the tale of a cheeky koala and his animal friends, while *Lizzie's Library* is set in the riverside community of Long Flat, Australia.

New from **Republic Entertainment International** is *Betty Boop Confidential*, a compilation of 11 nostalgic cartoon shorts.

From the archives of Russia's premier production studio, Soyuzmultfilm, comes *Mikhail Baryshnikov's Stories From My Childhood*. The series of 26 fairy tales by some of the world's most famous writers is available from **Solomon International Enterprises**.

The action-packed adventures of *Earthworm Jim*, a worm endowed with extraordinary physical strength, are on offer from **MCA TV International**. Also from MCA is

The Savage Dragon, a 13-part series starring a green-skinned cop.

Desclez Productions has two new animated series aimed at pre-schoolers: *Mirob*, which introduces viewers to everyday experiences through the eyes of a curious young robot, and *Little Star*, which made its debut on the Learning Channel in the U.S. this fall.

DIC Entertainment's slate of popular children's



programs includes *Tex Avery Theatre*, *Action Man*, *What-A-Mess*, and *Gadget Boy*, which has already been picked up in New Zealand, Singapore, Malaysia and Brunei.

From **France Television Distribution** comes *Nighty Night, Sleep Tight*, a series of 124 three-minute bedtime stories for the little ones.

Wimzie's House is **Cinar's** unique new puppet sitcom for pre-schoolers. The series has already attracted much attention in Asia as has *The Busy World Of Richard Scarry* which Cinar recently sold to Japan's Fuji TV.

The adventures of *Hobart And Cosmo*, the wackiest pals in the whole universe, are on offer from **MTM International**. Other children's programs from MTM include two new game shows: *Masters of the Maze*, and *Wild Animal Games*.

Globe-trotting adventure series *Mission Top Secret* will be available from **Grundy International Distribution**. The fantasy series features the adventures of the kids of the Alpha Centauri Network.

Mirror Mirror, is a new Australian/New Zealand co-production available from **Alliance Communications Corp**. The series tells the story of two 14-year-old girls who discover that they can travel through time.

The Kidsongs, from **Westinghouse Broadcasting International**, follows the adventures of 11 kids who produce their own music television programs. The overall message of the series is that kids become competent and confident young people as they solve problems at work and at play.

Two space-traveling teenagers team up with International Rescue in *Turbo Charged Thunderbirds* on offer from **PolyGram Television International**. The series of 13 half-hours features all the old members of the Tracy family, and of course Lady Penelope.

Dream Big, a live-action television

series based on WarnerVision's best-selling children's U.S. home video series will be distributed by Brian Lacey at the **4Kids Production** stand.

Leading Asian distributor **Juita Viden** will be representing France's **Revcom International** whose line up of programs includes the 52-part series *Delfy And His Friends*.

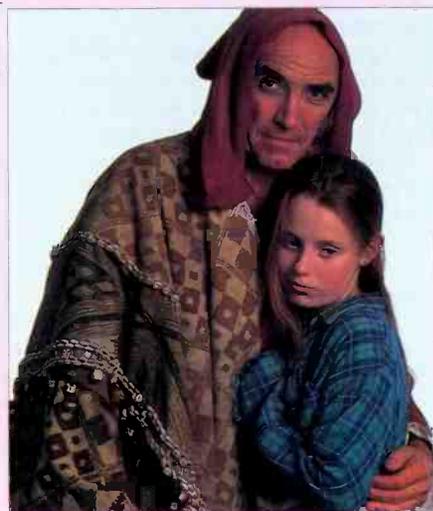
France's **Lumiere** is offering two series: *Daisy and Dandelion*, in 26 seven-minute eps, and *The Babaloos* (65x5 minutes or 13x30 minutes).

Pre-school series *Mr Men* and *Little Miss* are available from French distributor **Marathon International**. Its animated slate also features *Kasari and Leuk*, *The Amazimals* and *Ernest the Vampire*.

Toys come to life overnight in *The Story Store*, a new model animation series for kids from UK distributor **CIE**. Live action children's series *The Queen's Nose* (below) is also on offer.

The Australian Children's Television Foundation has new series *The Genie From Down Under*, a co-production with the BBC, and returning series *Lift Off* on offer.

TMS has a number of new animated offerings available, including *Little Nemo*, *The Red Baron*, *Sweet Tails Of St. Tail* and *Mundial Soccer Fever*.



Licensing Is Sweet For Saban

U.S. producer/distributor Saban International is building on sales of its programs to Asian broadcasters with lucrative merchandising deals.

According to Michel Welter, Saban's executive vice president of international operations, there are ten licences now in operation in the Philippines tying in with its teen live action series, *Sweet Valley High*. The show is airing to large audiences on dominant terrestrial broadcaster ABS-CBN.

"The Philippines was the first country to broadcast the show so it was the first for merchandising, but we also have negotiations in Indonesia, Taiwan and Singapore," said Welter. "We have set up meetings with potential licensees who are interested in representing us in Asia. Asia likes U.S.-designed toys, so we are looking for as many licensees as possible."

"Two years ago we had one person in charge of merchandising at Saban, now we have 50. We started in the domestic market and in Europe creating a network of contacts and agents, then we progressed to Latin America, and now we are investing in Asia."

Welter said the designs and colours will be a little bit different in the Asian region. "The products cannot be as expensive in Asia and we have to be careful of piracy," he said.

COMEDY

One of the top sellers in **Thames International's** catalog is *Mr. Bean*, the world's no. 1 nerd. Two new episodes starring Rowan Atkinson are on offer at Mip Asia.

Atkinson crops up again as dry-witted policeman Inspector Fowley in the *The Thin Blue Line*. Seven half-hour



episodes of the new comedy are available from **Polygram Television International**.

Caroline In The City, new

from **CBS Broadcast International**, follows the disastrous love life of a busy, single woman who lives and works out of an artist's loft in Manhattan. In addition CBS is offering *The Bonnie Hunt Show*, a new series from the creators of *The Late Show With David Letterman*, and *Can't Hurry Love*, a half-hour comedy from the producers of *Dave's World*.

MCA TV International is taking sitcom *Partners* to Mip Asia. The series, airing on the Fox network, offers a look at what happens to a friendship and business partnership when one guy gets engaged.

Super Dave features the exploits of the world's most famous – and indestructible – stuntman-entertainer. The 52-episode series, which aired on Showtime in the U.S., is available from **Unapix International**.

Articulate Has Interactive Aim

Malaysian-based Articulate Television, a subsidiary of Articulate Entertainment Sdn Bhd, will be at Mip Asia distributing its gameshow productions and formats to the Asian countries, in addition to trying to develop the concept of interactive tv around the region and searching for co-production partners.

Group chief executive officer Wytze Kuijper claims Articulate, formed in January 1995, is already the second largest production house in Malaysia. It already has a number of productions running on national television.

For new commercial station Metrovision, Articulate has developed *GoldQuest*, an English-language gameshow with an interactive element that is stripped six days a week across the schedule. It's also developed a weekly music show called *Metro Chart Show* and a twice-weekly consumer information show called *Top Of The Shops*. For national broadcaster RTM, Articulate has developed a format of Dutch company IDTV's gameshow *Lingo*. In the pipeline for 1996 is an interschool Bahasa-language gameshow for Metrovision and a family-type 90-minute entertainment show for RTM which will also have interactive elements.

In addition to producing local-language formats, developing interactive television concepts around Asia is a main priority for Articulate. The company is already developing an interactive series called *Space Wars*, versions of which have been sold in Indonesia, Thailand and Malaysia.

Executive Chairman Peter Schouten was the former head of Teleworld BV, a Dutch interactive tv company.

DOCUMENTARIES

Discovery Enterprises Worldwide has a variety of new and existing programs on offer at Mip Asia. *Forbidden City: The Great Within* (right), unveils the secret history of imperial China, while *Girlz 'N The Hood* takes a look at the female street gangs of LA. Two projects are available for pre-sale: *Immortality On Ice*, examining the controversial world of cryonics, and *Last Of The Czars*.

The battle between the U.S. and Russia to put the first man on the moon is the subject of *Race To The Moon*, a one-hour documentary available from **International Broadcast Network**.

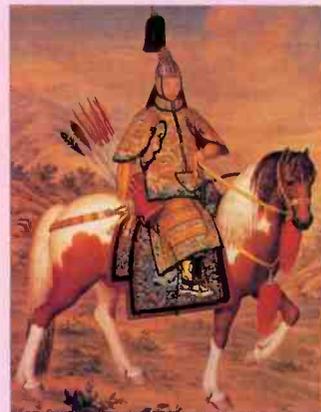
Continuing with the travel theme is the *Lonely Planet* series, available from Australia's **Beyond Distribution**. Based on the acclaimed series of books, each episode follows the journey of an intrepid traveller.

The 24-part series, *Battlefield I and II*, available from **PolyGram Television International**, provides a definitive account of the second world war. Using original footage and innovative graphic techniques, each program focuses on one key battle.

Conflict is also the subject of *Rivals*, a series which explores infamous showdowns between the likes of JFK and Khrushchev, Hitler and Churchill and Mansfield and Monroe. It's available from **Hearst Entertainment**.

Canada's **Sullivan Entertainment International Inc.** has a number of newly acquired documentaries on offer including the travel anthology *Discover Your World*, thirty half-hours devoted to vacation destinations all over the world.

From Sweden's **SVT International** comes *Socialism Or Death*, the poignant story of a group of young people in Castro's Cuba who injected



themselves with HIV-infected blood as a protest against the oppression of Communist rule.

Fox Lorber Associates' new 13-hour series, *The Lonely Directors*, profiles the men and women behind some of Hollywood's biggest blockbusters.

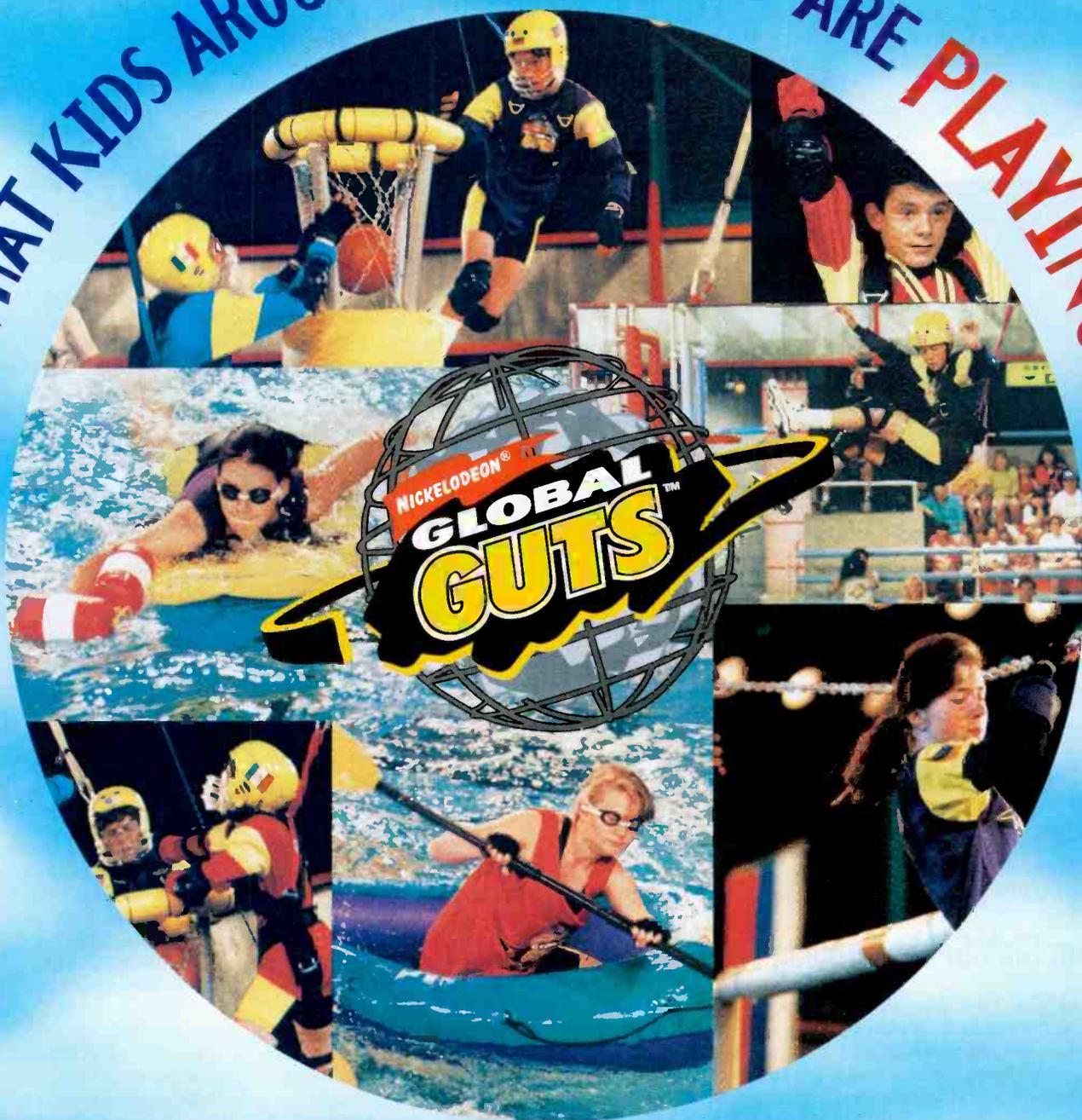
Two of France's most well known magazine programs are on offer from **France Télévision Distribution**. Broadcast since 1975, *Thalassa* is about the sea, while *Faut Pas Rêver* (Don't Dream) features people, culture and places from around the world.

Unexplained phenomena and tales of the supernatural are featured in *The Extraordinary*, a 70-part series available from **New World Entertainment**. *Customs Classified*, also from New World, is a 26-part reality series detailing the never ending war against drug smugglers, terrorists and other criminals.

Final Warning: The Lesson Of Chernobyl takes a look back at the world's worst nuclear accident and asks what lessons have been learnt about the dangers of nuclear proliferation. The thirty-minute special is available from **Teleproductions International, Ltd (TPI)**.

All American Fremantle International (AAFI) will be offering a new 13-hour docu-

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mentary series, *Endangered Civilizations*, looking at the fight for survival by vanishing cultures.

The New York Times: Science Times, is the first major television series to be adapted



from the archives and editorial resources of The New York Times. The weekly magazine series is available from **Video News International**.

Armchair travellers will get a chance to experience the world's most extraordinary wildlife in *WildGuide*, a new 13-part series from **Westinghouse Broadcasting International**.

MTM's representation of Nine Network Australia programming includes a new

season of the travel series *Getaway*.

Radiotelevision Española, flying the flag as Spain's only exhibitor at Mip Asia, is bringing a slate of documentary series available for tv and

video, including the 75-episode *Al Filo de lo Imposible*, an adventure series featuring "expeditions, descents, flights, crossings, cruises and explorations."

Expedition, from **Coral Pictures Corporation**, leads viewers on a 39-part exploration of the most exotic parts of South America, from the Amazon river to the fauna and flora of the subcontinent.

In response to inquiries at last year's market, Greece's

Chun Shih Seeks Funding For Epic Doc

At Mip Asia, Taiwanese independent production company Chun Shih will be looking for additional funding in the form of pre-buys for its mammoth production *Legend*, a 108x60 minute documentary chronicling Chinese culture, history and lifestyles. Produced in conjunction with the Chinese Academy of Arts, who have done much of the research, Chun Shih has fully-funded the production of five episodes itself at a cost of \$100,000 an episode but is hoping to interest international distributors and broadcasters for help with the remainder.

Chun Shih, which specializes in the production of educational and cultural programs, has a programming library spanning some 1000 Mandarin-language titles which have been distributed throughout Asia and also in the West through agents. However only 300 of the titles are owned by the distributor, rights to the remainder are held by Taiwanese broadcasters.

Formed 13 years ago Chun Shih produces extensively for Taiwanese terrestrial stations and cable operators. It is currently in production on an additional two series, a 13x60 minute children's gameshow at a cost of \$22,000 an episode and a 30 minute drama series at a cost of \$33,000 an episode. Chun Shih is keeping international rights for both.

French Exhibitors Stand Together

TV France International, the umbrella group representing French producers, distributors and broadcasters on the international market, is exhibiting for the first time with 22 companies taking space on its stand.

Formed by producers' association USPA, TV France International offers exhibitors cheaper stand space and the benefits of being in a shared venue where buyers can circulate from one exhibitor to another. Each company will have its own area with a common reception and bar space.

Companies new to Mip Asia under its banner include animation producer Procidis, education channel la Cinquième and drama producers Telfrance and Technisonor. According to USPA's Serge Ewencyk, it costs exhibitors half as much as buying space in their own right.

A number of French companies are nevertheless going it alone this year, including TF1 Enterprises, France TV Distribution and M6, international broadcast channels CFI and TV5, and producer/distributors Lumière, Marathon and PMMP.

Mega Channel is bringing documentaries about the Greek islands this time.

Unapix International has a sizeable catalog of documentary series and specials on offer at this year's Mip Asia. *Usbuaia: Adventures of Nicolas Hulot* is its reversioning into the English language of the long-running French series, featuring the heartstopping adventures of M. Hulot.

Two new documentary series from **Channel 4 International** will be launched at the market: investigative biography is the theme of *Secret Lives*, while *21st Century Jet* looks at the development of aerial passenger transport.

Hollywood Men is a third series lifting the lid on lifestyles of the famous and not-so-famous in Tinseltown made for UK broadcaster Carlton and available from **CTE**.

U.S. distributor **Devillier Donegan Enterprises** is showcasing new documentary series with subjects ranging from a natural history theme – *Tales Of The Serengeti* – to Hollywood – *The Moviemakers*.

GRB Entertainment has a new series of *World Of Wonder* (above left), exploring "natural wonders, man-made marvels and incredible personal achievements," on show at Mip Asia. It's also showing

the revived *Movie Magic* series about film stunts and special effects.

New episodes of ITV's long-running arts series, *The South Bank Show*, are among **RM Associates** slate of programming. Also on offer are *Accidental Empires*, *Piet Mondrian*, and *Opening Shots Series III*.

Worldwide Television News has three new documentaries on offer: the hour-long *The Changing World*, and two 13-part series *Agenda 21* and *Earth Works III*.

The six-part documentary *Hitler* is among the programs on offer from Germany's **ZDF Enterprises**. Other new series include *Terra X*, *Sphinx* and *Visions Of Life*.

Australia's **MC Stuart And Associates** has two new wildlife programs on offer at Mip Asia: *Australia's Endangered Species* and *Angels Of The Sea*.

In Care Of Nature and *Unearthing Ancient Civilizations* are the two new documentary series being launched at Mip Asia by French distributor **Marathon International**.

DRAMA

American Gothic, the paranormal drama currently airing on CBS in the U.S., headlines **MCA TV International's** line-up at Mip Asia. In addition MCA has two new series produced by Sam Raimi and Robert Tapert – *Hercules: The Legendary Journeys* and *Xena: Warrior Princess* – as well as *New York Undercover*, a cop series produced for the Fox Broadcasting Network.

Robbie Coltrane stars as Fitz, the criminal psychologist, in a third series of the award-winning detective drama *Cracker*. The Granada TV Production is available from **Brite**, along with *Strike Force*, a 90-minute pilot following the lives of an elite group of F3 Tornado flyers.

Thames International has two popular cop shows on offer at Mip Asia: NBC's *Homicide – Life On The Streets*, voted by American critics as the best police drama on American tv, and *The Bill*, the UK's top-rating police series.

River of Hope is a grand saga of passion and romance on offer from **France Television Distribution**. It was co-produced by France 2 and Gaumont.

The survivor of a plane crash finds he has the power to avert disaster in the 22-part series *Strange Luck*, one of the titles on offer from **New**

World Entertainment

The Lazarus Man is the tale of a man who is freed from the grave in which he was buried alive,

only to find he has lost his memory. Robert Ulrich stars in the two-hour pilot and series of 20 one-hour episodes, available from **Turner International**.

On offer from **CBS** is *Central Park West*, which follows the lives of an elite clique of wealthy New Yorkers.

The first series of *Due South* sold to over 60 countries worldwide; now **Alliance Communications Corp.** is working on 13 new one-hour episodes of the quirky action/adventure series, in collaboration with the BBC and RTL2.

Nelvana will showcase thirteen new episodes of the action series *Nancy Drew* and *The Hardy Boys*. Both made their syndication debut in the U.S. this fall. Also on offer from Nelvana is the family drama, *Jake And The Kid*.

Fire Series II, features three new stories revolving around the fire crew at South-East Station, available from Australia's **Beyond Distribution**.

Wind At My Back, a new series from Canada's **Sullivan Entertainment International**, chronicles the struggles of a recently widowed mother and her children during the Depression.

Baywatch star David Hasselhoff continues his role as Lt Mich Buchannon in *Baywatch Nights*, available from **All American Freemantle International**.

The Cape follows a group of young astronauts from the beaches of South Florida to the depths of outer space, as they strive to prove they have "the right stuff." The two-hour pilot and 10-part series are available from **MTM International**.

Telenovelas are the highlight of **Coral Pictures Corporation's** offering at Mip Asia. It has already sold two novelas into Chinese-speaking territories – *Kassandra* to

Adventures In Revolution

Thai independent production and distribution company JSL will be promoting its major new drama, *The Dragon's Pearl*, at Mip Asia.

A Thai/Sino co-production between JSL and Chinese production company Beijing Tian Qin, the 20 x 45 minute, \$400,000 drama is based on the true story of a Thai girl and her brother who, in 1956, were sent to live with the then Chinese premier Zhou Enlai.

The story follows their struggle for survival during the Cultural Revolution. According to Apiwat Watanangura, deputy managing director, it is the first drama co-production between the Chinese government and a foreign company where the lead character is not Chinese.

With the script already approved by the Chinese Communist Party, the drama began shooting in China in October and will move to Thailand in February. Post-production will also be done in Thailand. Fully financed by JSL and Beijing Tian Qin, *The Dragon's Pearl* will be available from June 1996 and at that time will begin broadcasting on Thai broadcaster Channel 7 in a primetime drama slot.

In China, deals have already been concluded with some 60 provincial stations. Apiwat said he is also hoping to sell the show to NHK in Japan and also to ethnic nets in North America.

CETV and *Cristal* to Guangdong cable in China. This time round, the Miami-based distributor has four series currently in production including *La Inviolable*, an epic romance set in the twenties and *Pura Sangre* (Untamed Hearts), the story of a rebellious young woman at the center of a family feud.

Radiotelevision Española will have two novelas first launched on the international market at Mip TV. *Guadalupe* is a cocktail of "violence, retaliation, struggle for success... and above all love," while *Marielena* tells the story of a woman from a humble family who falls in love with a married man.

Greek tv network **Mega Channel** brings two new series currently in production: *Absence* and *Temptation*, both in 20 45-minute episodes.

Mega has already sold its action series *Detective Zarras* and the long-running *Thirst* to Indonesia's SCTV, while *Velvet Moon* is set to launch on Chinese

regional channels, dubbed into Mandarin. *Detective Zarras* and *Thirst* are due to follow.

Brazil's Globo TV has 130-part *Tropicaliente*, in which a love affair from the past is rekindled, three other novelas, *Golden Dream*, *Story Of Love* and *Shadow And Light*, on offer at Mip Asia.

Argentina's **Artear** will be airing two new telenovelas: the 120-episode *Sheik* and 195-episode *Nano*.

Action hours are at the forefront of U.S. distributor **Rigel Independent Distribution's** offering this time round. Two movie spin-offs, *Universal Soldier* and *Robocop*, have a sci-fi theme and setting, while *Land's End* and *Pacific Blue* both feature law makers going about their business in exotic Pacific surroundings.



ENTERTAINMENT/GAMESHOWS

All American Fremantle International (AAFI) is now expanding into other markets. At Mip Asia it will be offering a number of its proven game show formats, including *The Pyramid Game*, *Let's Make A Deal*, and *Supermarket Sweep*.

In China, AAFI is looking to set up a joint venture production company with Endemol, which David Champaloup, head of international television, said would center around a key local individual. "Putting together the business plan was not difficult," he said, "the single hardest thing is finding that key person."

The company will be seeing people during Mip Asia and hopes to have the joint venture up and running by mid 1996. While confident that most of AAFI's gameshow formats will trans-

late in China, Champaloup said it is not inconceivable that the outfit could end up creating original formats, "a whole new strand of Chinese entertainment."

King World International is launching its new poker-based gameshow format, *Poker Palace*, at Mip Asia. The format will be available in English and also as a Chinese version, based on Pai Gow Poker, a Chinese version of the card game. King World hasn't yet done any format adaptations in China. "We are waiting for the right offer," said Fred Cohen, president, King World International. "China is not an easy market and we will be proceeding carefully." Elsewhere in Asia, King World also has a gameshow for Indian network Sony Entertainment Television

in the pipeline.

Kathleen Turner, Li Cool J and Anna Nicole Smith are among the guests for a series of one-on-one conversations with actress and model Lauren Hutten. On offer from **Turner International**, *Lauren Hutten and...will also feature guests from such diverse fields as politics, sports, fashion and publishing.*

Top Models delves into the lives of five of the world's most famous supermodels: Claudia Schiffer, Naomi Campbell, Carla Bruni, Karen Mulder and Elle McPherson. The 5x52 minutes series is available from **France Télévision Distribution**.

Fashion and beauty are also the focus of *Looking Good*, on offer from **MTM International**. The series of 22 one-hour shows offers practical advice on how to look your best and includes internationally known models as well as makeovers of ordinary people.

E! Entertainment Television has a number of packages available focusing on today's top celebrities from the world of movies, television and music. Regular series such as *E! News Week In Review*, *In Focus* and *Behind The Scenes* are all on offer, providing the latest celebrity interviews, on set footage and Hollywood gossip. A Mandarin-language version of *Behind The Scenes* is currently in production in China; 50% of E!'s international sales at present stem from the Asian region.

Day and Date, available from **Westinghouse Broadcasting International**, is a daily one-hour series featuring topical stories from around the world. The series made its debut in the U.S. this September and is a co-venture between CBS and Group W Productions.

Bizarre tabloid stories are brought to the small screen in *Weekly World News* from **New World Entertainment**.

Action-packed sports and dazzling magic acts are featured in **Fox Lorber's** programming line up. *High Adventure*, produced for the outdoor channel in the U.S., highlights some of today's most dangerous sports, while *The Great Magic of Las Vegas* features top international magicians in a series of six one-hour shows.

More magical feats are on offer in three specials available from **Hearst Entertainment**: *Lance Burton Master*



Magician: The Legend Begins, *The Second Annual World's Greatest Magic*, and *Houdini's Greatest Tricks: The Death Defying Spectacle*.

A selection of the world's fittest and most beautiful women athletes are featured in two offerings from **Solomon International Enterprises**: *Ms. Fitness World 1995* and *Ms. Fitness USA 1995*.

Balls On The Run is a new interactive gameshow from **SPI International**. Viewers phone in to predict the outcome of six live races between balls moving around a track.

The musical hits *Les Miserables 10th Anniversary Gala*, and *Five Guys Named Moe* are both on offer from **VCI Program Sales**. Also from VCI are 30 episodes of the comedy series *Saturday Night Live*.

HK Distrib Looks For More Bonds

Hong Kong-based United Distribution, a subsidiary of the diversified media and entertainment company United Media And Entertainment Corporation (UMEC) will be distributing several new shows at this year's Mip Asia.

In 1994, United Film & Video Ltd., the group's Hong Kong-based production arm formed a joint venture with Chinese city station Guangzhou TV called GZTV United Productions Ltd, to produce and distribute shows throughout China. A trailer for one of the first fruits of this collaboration - a 30x60 minute historical drama called *Bonds of Blood* - will be available for viewing. According to distribution manager Roberta Wong, the production will be shot in China and Canada. "We have some scripts approved and will start shooting next year," she said.

United, said Wong, has just started getting into the production of dramas, "Because in China that is the only genre for which you can get primetime slots."

Two other dramas the company is currently working on are an action police story called *Police Headquarters* budgeted at \$65,000 (U.S.), and a romantic drama budgeted at \$39,000 to \$52,000, called *Passage To America*.

In 1995, United syndicated 100 hours of variety and music and has been distributing the Family Channel's programming in China on a barter basis. Wong said she is looking for more western catalogs at Mip Asia. "We would also like to diversify into distributing other genres such as sports and science programs," she said.

"American companies are holding back because they always think the prices being paid are too low. So we are trying to set up a deal to work as an agent where we look at the library, say which shows would most likely sell, and then split the revenues."



"ESTHER AND SARAH"

2 X 110' or 4 X 50' (1994),
shot on outside location in Turkey
With Ludmila MIKAEL, Sam KARMANN...

*In the 50ties, the moving story of a young girl and her mother, torn
between their native Turkey and France, their country of adoption...*

**"LES GENS DE MOGADOR"
(THE PEOPLE OF MOGADOR)**

6 X 100' or 12 x 50'

With Marie-José NAT, Brigitte FOSSEY, Marie-France PISIER, Jean-Claude DROUOT

*After 20 years of silence, one of the French drama masterpieces is back again in a new
"Prime Time" format : this glamorous fresco tells a family saga
around 3 women's generations (1852-1925)...*



**"LE PARFUM DE JEANNETTE"
(FRAGRANCE OF THE PAST)**

TV - movie of 90' (1995)

With Pierre ARDITI, Françoise DORNER, Laure DUTHILLEUL, Yann TREGOUET

*Coming to buy the precious fiddle which he sold long ago, Charles is abruptly
confronted with his past, as the sellers are his former girlfriend and his
unknown 18 year-old son...*

"LA MUSIQUE DE L'AMOUR" (1994)

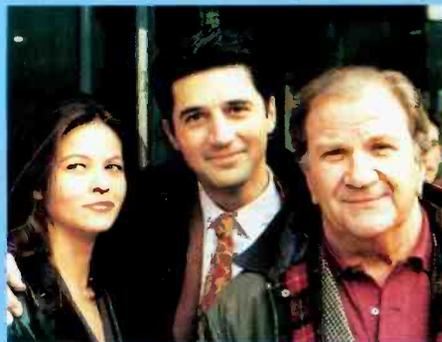
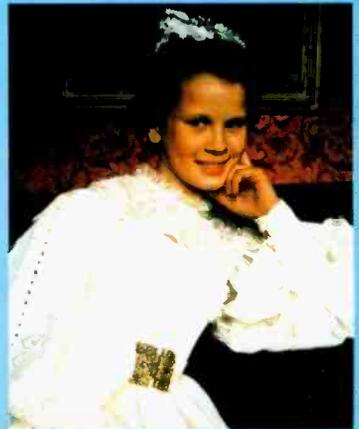
(THE MUSIC OF LOVE), 3 X 90', 35 mm film

CLAUDE DEBUSSY'S PASSIONS, ROBERT AND CLARA SCHUMANN,
LUDWIG VAN BEETHOVEN.

With Thomas LANGMANN, Pascale ROCARD, Bulle OGIER, François MARTHOURET...

Shot on outside location in Russia.

The relations of musicians of genius with the women they passionately loved...



**"LES CORDIER, JUGE ET FLIC"
(CORDIERS, JUDGE AND COP)**

Crime-Collection of 17 x 90' (1994/1995)

With Pierre MONDY, Antonella LUALDI, Bruno MADINIER, Charlotte VALANDREY...

*A 50 year-old cop has sometimes to cooperate with his son, a newly appointed
judge, and also his daughter, a brilliant reporter, in thrilling criminal cases...*

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MINISERIES

Teal (*Cheers*) Danson stars in *Gulliver's Travels*, a four-hour



miniseries based on Jonathan Swift's tale and available from **Hallmark Entertainment**.

Catherine The Great is a four-hour miniseries starring Catherine Zeta Jones available from **Solomon International Enterprises**. Directed by four-time Emmy-award winner Marvin J. Chomsky the series also stars Jeanne Moreau and Omar Sharif.

The lives of three young women doctors in a big city hospital are featured in *Nothing Lasts Forever*, from **CBS Broadcast International**.

SPORT

ISL Television, which represents 22 of the 33 largest televised sports events in the world, is selling tv rights for upcoming events including the 1998 Asian Games from Bangkok, the 1997 and 1999 IAAF world athletics championships, and its own-produced series including magazine *Asian Sports Extra*.

Munich-based **ISPR** has rights for three major events: Compaq Grand Slam Tennis, European Cup soccer and the German Soccer League.

Hulk Hogan, Ravishing Rick Rude and Big Van Vader are among the top names in *World Championship Wrestling*, on offer from

The four-hour mini-series, based on a Sydney Sheldon novel, stars Brooke Shields, Vanessa Williams (*Melrose Place*) and Gail O'Grady (*NYPD Blue*).

Shannon Doherty, of *Beverly Hills 90210* fame, stars in *Gone In The Night*, a four-hour mini-series from **ACI**. The story focuses on a young couple wrongly accused of murdering their seven-year-old daughter.

On offer from **PolyGram Television International** is the six hour mini-series *A Woman Of Independent Means*. Sally Field stars in the role of the well-heeled Bess Steed Garner.

The Invaders, a two-part mini-series from **Republic Entertainment International**, continues the story of the cult tv series that first aired in the U.S. in 1967.

Turner International. Also from Turner comes coverage of 1994's *Goodwill Games*, held in St. Petersburg, Russia.

Torvill And Dean — Their Farewell Tour features the duo in a final exhibition of ice dancing. The 58-minute special is on offer from **PolyGram Television International**.

Some of the world's top martial arts athletes compete against each other in two new series at Mip Asia. From **Solomon International Enterprises** comes *Ultimate Fighting Championships*, a series of eight programs, while **4 Kids Productions** is offering *WMAC Masters*.

MUSIC

At Mip Asia, **Country Music Television** (CMT) will be concentrating on building its channel distribution throughout the region, as opposed to program syndication, according to Tom Hawley, vice president of international distribution and special markets.

Recent deals have been signed by the Group W/Gaylord-backed channel in New Zealand, Thailand and Malaysia.

CMT also has distribution in Taiwan but, said Hawley, is taking that market slowly. The music network is also anxious to get carriage in Singapore and especially the Philippines.

The Brit Awards 1996, a 90-minute British music industry concert special, is available from **PolyGram Television International**. Last year's event featured live performances by Madonna, Elton John, Take That and Sting.

Other offerings from PolyGram include the 90-minute special *Pavarotti And Friends Together For The Children Of Bosnia* (below) which sees the great tenor joined by the likes of Bono, Duran Duran

and Meatloaf, and *Bon Jovi Live*, which features the group in concert at Wembley Stadium in June 1995. The music of the middle ages is captured in *Plainsong*, a concert series of four half-hours available from **Solomon International Enterprises**.

On offer from **SVT International** is the 52-minute documentary *Really Roxette*, a celebration of the Swedish group's 10th birthday.

Country and western star Willie Nelson is the host of *Tootsies Orchid Lounge — Where The Music Began*. The one-hour show made for U.S. network television is available from **Grundy International**.

Guangzhou TV United Productions Ltd will be showing *Pop Hits*, a music show featuring Chinese and international hits which is airing on Guangzhou TV and Shanghai TV's cable music channel.

Wexler Enterprises Inc. has a number of musical offerings at Mip Asia, including 100 half-hours of *Rock Around The Clock*, and three new *Power Play* series: *Cool Vibes*, *The Acid House Mix* and *Top 100*.



TV MOVIES

Turner International's tv movie line-up boasts a number of big Hollywood names. In *Avenging Angel*, Tom Berenger plays an infamous gunfighter, while Tom Selleck is a morally upright judge in *Broken Trust*, and Jamie Lee Curtis stars as a feisty feminist in *The Heidi Chronicles*. John Goodman portrays the controversial Governor of Louisiana in *Kingfish: A Story Of Huey P. Long* (below).



Also boasting an all-star cast is **ACI's** *The West Side Waltz*, which brings together three of Hollywood's leading ladies, Shirley MacLaine, Liza Minnelli and Kathy Bates, in a moving story of how life turns around for an ailing widow when she meets a spirited young woman.

From **Brite** comes *The One That Got Away*, the true story of a British special forces patrol dropped behind enemy lines in Iraq at the height of the Gulf War.

In **New World Entertainment's** *A Child Is Missing*, the disappearance of an eight year old boy leaves his mother at the mercy of a devious kidnapper. Other features on offer from New World include *Hawkeye*, the tale of a legendary woodsman and a Virginia gentlewoman facing the hardships of frontier life and *Deceived By Trust*, a controversial story of adult/teen sex.

The private life of

Roseanne Arnold is revealed in the tv movie *Roseanne*, on offer from **Polygram Television International**. PolyGram's slate of movies also includes *Roswell*, based on the true story of a mysterious object found in the New Mexico desert, believed by some to be a UFO.

Dead Man's Island stars William Shatner, Barbara Eden and Morgan Fairchild in a two-hour mystery drama set on a Pacific Island, available from **CBS Broadcast International**.

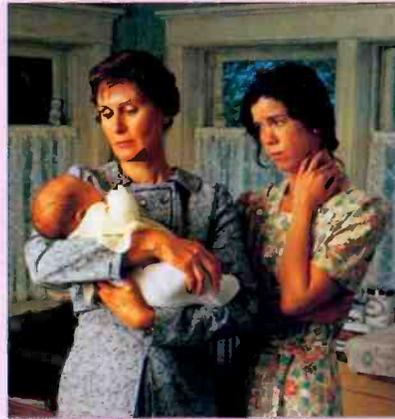
Canada's **Alliance Communications Corp.** has two action adventure features on offer at Mip Asia. In *Gridlock*, David Hasselhoff takes to the air as a

police helicopter patrolman, battling to prevent a daring bank robbery in New York. Charles Bronson stars in *The Brewery* as a police inspector whose daughter is accused of murdering a notorious crime figure.

Men And Women is a new comedy on offer from **France Télévision Distribution**. The 90-minute tv movie focuses on a young couple who are too happy together, that is until the day the wife decides to trap her husband.

Butterbox Babies (above right), the most successful MOW in Canadian history, is now available from **Sullivan Entertainment International**, whose slate of features also includes *Under The Piano*, a tv movie made for CBS.

Cagney and Lacey team up once more for two new television movies, *The View Through The Looking Glass* and *True Convictions*, from **MTM International**.



Cheryl Ladd, in which a young girl's visions hold the key to a murder mystery.

The magnificent jungles of India are the setting for *Jungle Boy*, a new movie from **Moonstone Entertainment**. Production is due to start in Bangalore in January 1996. Other action-packed titles on offer from Moonstone include,

Night Hunter, *Midnight Heat*, *Mask Of Death*, and *Bounty Hunters*.

Farrah Fawcett stars as a strong willed woman of part-Stouix heritage in the sweeping love story *Dalva*. Produced for ABC, the two hour MOW is available from **Hallmark Entertainment**.

A controversial talk show host becomes involved in the murder of a beautiful women in *Power 98*, available from **Curb Entertainment International**. Also on offer is *Under The Domim Tree*, a film from Israel about the Nazi concentration camps.

Hearst Entertainment's line-up of tv movies is headed by *The Lady*, starring

The Anette Funicello Story from **Rigel Independent Distribution** recounts the life of the actress from childhood stardom to the teenage movie *Beach Party* on the Mickey Mouse Club to a present-day battle with multiple sclerosis.

Atlantis Releasing Pty, the Australian office of the Canadian distrib, will have three new made-for-tv movies on offer: *Nothing but The Truth*, *Paris or Somewhere* and *Heck's Way Home*.

Southern Star Pre-Sells Raft Of Co-Pros

One show that will be available for pre-sales from Australian producer-distributor Southern Star at Mip Asia is *Magic Mountain*, a co-production between production arm Southern Star Pacific, and China Central Television (CCTV)'s children's department.

The production, a 26x10 minute pre-school puppet series, will start shooting in June 1996, for completion in December 1996.

According to Ron Saunders, head of Southern Star Pacific, the series will be shot in China, using a Chinese crew, while the script and post production will be done in Australia.

Investment-wise, the cost is being split 50-50 between the two parties, with CCTV taking the Chinese-language rights and the rest still up for discussion. The production budget is \$50,000 per episode.

Aside from the financing, Saunders said CCTV is very much involved in the creative process as well. "The show is designed for the international pre-school market, there is never enough top end material for that age group," he said.

Also available for pre-sales is *The Land of The Dragon*, a children's fantasy series. The series goes into production in 1996, in association with Shanghai Film Studios.

Southern Star has done a number of other co-productions with South East Asian partners, including a drama series with NHK called *Escape From Jupiter*, the second series of which starts shooting in January. Saunders said another project is currently being written with PPFN, an Indonesian production company.

TBI's 1995 MIP ASIA Program Guide and Contact Directory



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THE BUYERS' GUIDE TO PROGRAMS AT MIP ASIA

PRODUCT TITLE	EPISODES	RIGHTS		DISTRIBUTOR	NEW OR RETURNING	STAND NO.
		TV	Theatrical Video			
ACTION/ADVENTURE						
American Gothic	22 x 60 mins	•		MCA TV International	New	G9/H10
Baskins Run	95 mins	•	•	Arrow Films International	New	H4.20
Bounty Hunters	1x90 mins	•	• •	Moonstone Entertainment	Return	N4
Gridlock	2 x60 mins	•	•	Alliance Communications Corp.	New	
Hollywood's Greatest Stunts	3x1 hour	•		GRB Entertainment	New	
Mask of Death	1x90 mins	•	• •	Moonstone Entertainment	Return	N4
Midnight Heat (A.K.A)	1x90 mins	•	• •	Moonstone Entertainment	Return	N4
Night Hunter	1x90 mins	•	• •	Moonstone Entertainment	Return	N4
The Lazarus Man	1x2 hrs/20x1 hr	•		Turner International	New	
Xena: Warrior Princess	22x60 mins	•		MCA TV International	New	G9/H10
ANIMATION						
Aaahh! Real Monsters	39x24 mins	•		Nickelodeon	Return	M19
Action Man	26x30 mins	•		DIC ENT. L.P	New	L10/M9
Aeon Flux	10x30 mins	•		MTV	Return	L20,M19,L22,M21
Alfie Atkins	16x10 mins	•		SVT	New	A17
Betty Boop Confidential	90 mins		•	Republic Entertainment	New	
Blinky Bill Series I & II	52x30 mins	•		Beyond Distribution	New	D2
Classic Cartoons	30 hrs	•	•	SPI International	Return	
CRO	21x30 mins	•		CTW International TV Group	New	K26/L25
Daisy and Dandelion	26x7 mins	•	•	Lumiere	New	B19
Delfy and his Friends	52x26 mins	•	•	Revcom International	New	
Dragonfly	26x26 mins	•		Gaumont	New	TVF1
Earthworm Jim	13x30 mins	•		MCA TV International	New	G9/H10
Ernest the Vampire	117x30 mins	•	•	Marathon International	New	L2
Flash Gordon	26x30 mins	•	•	Hearst Entertainment	New	L.29
Highlander	40x26 mins	•		Gaumont/Rysher	Return	TVF1
Home to Rent	52x13 mins	•		Gaumont	New	TVF1
Jonny Quest	65x30 mins	•	•	Turner International	New	
Kasil and Leuk	26x26 mins	•	•	Marathon International	New	L2
Little Nemo	85 mins	•	• •	TMS	New	M37
Little Rascals - Colorized	71 episodes	•		KW International	New	B20/C19
Little Rascals Christmas Special	30 mins	•		KW International	New	B20/C19
Lizzie's Library	26x5 mins	•		Beyond Distribution	New	D2
Madeline	33x30 mins	•		DIC ENT. L.P	New	L10/M9
Magic Knight Rayearth	49x30 mins	•	•	TMS	New	M37
Max the Cat	26x5 mins	•	•	Mediamax International	New	B34
Mole and his Friends	6x28 mins	•		TransTel GmbH	New	K41
Monster Mania	26x30 mins	•	• •	Hallmark Entertainment	New	
Mr Men and Little Miss	104x5 mins	•	•	Marathon International	New	L2
MTV Oddities "The Head"	13x30 mins	•		MTV	Return	L20,M19,L22,M21
MTV Oddities "The Maxx"	7x30 mins	•		MTV	Return	L20,M19,L22,M21
Mundial-Soccer Fever	52x30 mins	•	•	TMS	New	M37
Ninja Robots	43x30 mins	•	•	WBI	New	C20-D19
Oliver Twist	26x30 mins	•		Saban International	New	H10/J9
Phantom 2040	33x30 mins	•	•	Hearst Entertainment	New	L.29
Prince of Atlantis	26x30 mins	•		WBI	New	C20-D19
Rocko's Modern Life	52x24 mins	•		Nickelodeon	Return	M19
Savage Dragon	13x30 mins	•		MCA TV International		
Sky Dangers	26x26 mins	•		Gaumont	New	TVF1
Space Monkeys	13x30 mins	•	• •	Hallmark Entertainment	New	
Street Sharks	13x30 mins	•		DIC ENT. L.P	New	L10/M9
Sweet Tales of St. Tail	48x30 mins	•	•	TMS	New	M37
Sylvan	65x26 mins	•	•	INI	Return	
Tex Avery Theater	195x7 mins	•		DIC ENT. L.P	New	L10/M9
The Adventures of Dodo	65x5 mins	•		WTN	New	H31
The Amazimals	26x5 mins/ 52x30 mins	•	•	Marathon International	New	L2
The Babaloos	65x5 mins/ 13x30 mins	•	•	Lumiere	New	B19

PRODUCT TITLE	EPISODES	RIGHTS		DISTRIBUTOR	NEW OR RETURNING	STAND NO.
		TV	Theatrical Video			
The Fruitties	52x26 mins	•	•	D'Ocon Films	Return	
The Little Witches	26x26 mins	•	•	TFI Enterprises	New	
The Red Baron	49x30 mins	•	•	TMS	New	M37
The Ren and Stimpy Show	52x24 mins	•	•	Nickelodeon	Return	M19
The Story Store	13x10 mins	•	•	CTE	New	H31/G34
The Street Cleaners	26x26 mins	•	•	D'Ocon Films	Return	
The Wood Keeper	26x26 mins	•	•	D'Ocon Films	New	
Turtle Island	26x22 mins	•	•	HD-Desclez Productions Inc.	New	11.28
What-a-Mess	26x30 mins	•	•	DIC ENT. L.P	New	L10/M9

CHILDREN'S/YOUTH/FAMILY

Are You Afraid of the Dark?	65x30 mins	•	•	CINAR	Return	C23
Arthur	30x30 mins	•	•	CINAR	New	C23
Born Winners	26x13 mins	•	•	Marathon International	New	L2
Earth Works III	13x30 mins	•	•	WTN	New	H31
EC Plays Lift Off	13x24 mins	•	•	ACTF	Return	H32
Gladiators 2000	39x30 mins	•	•	Samuel Goldwyn	Return	L33
Gumby the Movie	88 mins	•	•	Arrow Films International	New	H4.20
Hot Dog Channel	60x30 mins	•	•	Globo TV Network Brazil	Return	F20,F22 & G19
Jake and the Kid	13x45 mins	•	•	Nelvana Entertainment	New	H24
Jungle Boy	1x90 mins	•	•	Moonstone Entertainment	Return	N4
Lassie	13x30 mins	•	•	SIE	New	
Lift Off	78x24 mins	•	•	ACTF	Return	H32
Lili From Begonia	6x26 mins	•	•	Mediamax International	New	B34
Little Bear	13x23 mins	•	•	Nelvana Entertainment	New	H24
Little Star	156x15 mins	•	•	HD-Desclez Productions Inc.	New	11.28
Mirob	156x5 mins	•	•	HD-Desclez Productions Inc.	New	11.28
Molly	13x25 mins	•	•	Marathon International	New	L2
Nancy Drew	26x24 mins	•	•	Nelvana Entertainment	New	H24
Noah's Kids	7x7 mins	•	•	Marathon International	New	L2
Open Sesame II	52x30 mins	•	•	CTW International TV Group	New	K26/L25
Pals	10x25 mins	•	•	M.C.Stuart	New	K29
Salty	26x30 mins	•	•	SIE	New	
Sesame Street	130x60 mins	•	•	CTW International TV Group	New	K26/L25
Shelley T. Turtle Show	26x30 mins	•	•	4Kids Productions	New	05.40
The Busy World of Richard Scarry	52x30 mins	•	•	CINAR	Return	C23
The Happy Professor	156x15 mins	•	•	HD-Desclez Productions Inc	New	11.28
The Hardy Boys	13x23 mins	•	•	Nelvana Entertainment	New	H24
The Intrepids	52x26 mins	•	•	Marathon International	New	L2
The Little Lulu Show	26x30 mins	•	•	CINAR	New	C23
The Queen's Nose	6x30 mins	•	•	CTE	New	H31/G34
Wanted: Grandfather	1x55 mins	•	•	SVT	New	A17
Wimzie's House	56x30 mins	•	•	CINAR	New	C23
WMAC Masters	26x30 mins	•	•	4Kids Productions	New	05.40

COMEDY

Dreamers	90 mins	•	•	International Creative Exchange	New	14.15
Happy Ever After.. Once Apart	104 mins/ 2x52 mins	•	•	France Television Distribution	New	H2-J3
Live Nude Girls	94 mins	•	•	Republic Entertainment	New	
Partners	13x30 mins	•	•	MCA TV International	New	G9/H10
Round the Twist	26x24 mins	•	•	ACTF	Return	H32
Saturday Night Live	30x90 mins	•	•	VCI Programme Sales	New	M14
The Genie from Down Under	13 x24 mins	•	•	BBC UK	New	H32
The Thin Blue Line	7x30 mins	•	•	PolyGram TV	New	E14/F11

CURRENT AFFAIRS

E! News Week in Review	52x60 mins/30 mins	•	•	E! Entertainment Television	Return	J14/K13
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DOCUMENTARIES

21st Century Jet	5x52 mins	•	•	Channel 4 International	New	H29
100 Years of the Olympics	1x2 hrs	•	•	Turner International	New	
1995/6 South Bank Show Season	18x52 mins	•	•	RM Associates	New	N15
Accidental Empires	3x50 mins	•	•	RM Associates	New	N15
Adventures of the Old West	6 hrs	•	•	IBN	Return	
Agenda 21	13x30 mins	•	•	WTN	New	H31

MARKET INTELLIGENCE

PRODUCT TITLE	EPISODES	RIGHTS		DISTRIBUTOR	NEW OR RETURNING	STAND NO.
		TV	Theatrical Video			
Alaska: Kenai Fjords	1x30 mins	•	•	Teleproductions International	New	N3
El Filo de Lo Imposible	75x60 mins	•	•	RTVE	Return	K2
Battlefield I & II	24x60 mins	•	•	PolyGram TV	Return	E14/F11
Charles Schulz Biography	1x60 mins	•	•	All American Fremantle Int'l	New	M38, N37
De Polo a Polo	14x30 mins	•	•	RTVE	Return	K2
Discovering/Great Minds of Science	6x30 mins	•	•	IBN	New	
Divine Magic	10x60 mins	•	•	Devillier Donegan	New	A1/134
Elizabeth Taylor	1x60 mins	•	•	Devillier Donegan	New	A1/134
Faut pas Rever	52x13 mins	•	•	France Television Distribution	New	H2-J3
Final Warning: Lesson of Chernobyl	1x30 mins	•	•	Teleproductions International	New	N3
Flightline	13x30 mins	•	•	WTN	New	H31
First Day	55 mins	•	•	ACTF	New	H32
Great Cities of the Orient	2 x 58 mins	•	•	Discovery International	New	434
Great Splendors of the World	3 hrs	•	•	IBN	New	
Hidden Worlds	10x30 mins	•	•	Devillier Donegan	New	A1/134
Hitler	6x52 mins	•	•	ZDF Enterprises	New	E5, level 5
In Care of Nature	26x26 mins	•	•	Marathon International	New	L2
In My Craft Room	26 x 26 mins	•	•	Discovery International	New	434
Islands	14x30 mins	•	•	IBN	New	
Leaving Home: 20th Century Music	7x60 mins	•	•	RM Associates	New	N15
Liberation 1945	90 mins	•	•	Samuel Goldwyn	Return	L33
Life on the Digital Edge	26 x 30 mins	•	•	Fox Lorber Associates	New	17.29/19.17
Medical Report	7 x 28 mins	•	•	TransTel GmbH	New	K41
Movie Magic	43x30 mins	•	•	GBR Entertainment	New	
Network First: Eilish, Life Without Katie	52 mins	•	•	Brite	New	F14-G13
Opening Shot Series III	12x26 mins	•	•	RM Associates	New	N15
Other People	46x60 mins	•	•	RTVE	Return	K2
Piet Mondrian	50 mins	•	•	RM Associates	New	N15
Race to the Moon	1x1 hr	•	•	IBN	New	
Ramses II: Glorious Pharaoh	1x30 mins	•	•	Teleproductions International	New	N3
Relaxacise with Barbara Martin	26 x 26 mins	•	•	Discovery International	New	434
Rivals	18x1 hr	•	•	Hearst Entertainment	New	L.29
Route of the Explorers	13x30 mins	•	•	Chrysalis Distribution	New	
Secret Lives	6x52 mins	•	•	Channel 4 International	New	H29
Serie Galant	24 x 8 mins	•	•	Discovery International	New	434
Sentiments/Feelings	25 x 90 mins	•	•	Revcom International	Return	
Socialism or Death	1x78 mins	•	•	SVT	New	A17
Solid Chocolate	1 x 90 mins	•	•	Discovery International	New	434
Space Tech	13x30 mins	•	•	Fox Lorber Associates	New	17.29/19.17
Sphinx	11x45 or 52 mins	•	•	ZDF Enterprises	New	E5, level 5
Tales of the Serengeti	4x60 mins	•	•	Devillier Donegan	New	A1/134
Terra X	40x43 mins	•	•	ZDF Enterprises	New	E5, level 5
Thalassa	26x26 mins	•	•	France Television Distribution	New	H2-J3
The Changing World	1x60 mins	•	•	WTN	New	H31
The Directors	13x60 mins	•	•	Fox Lorber Associates	New	17.29/19.17
The Moviemakers	5x60 mins	•	•	Devillier Donegan	New	A1/134
The Saga of Life	3x60 mins	•	•	SVT	New	A17
The 7th Sense	26 x 3 mins	•	•	TransTel GmbH	New	K41
Unearthing Ancient Civilizations	4x52 mins	•	•	Marathon International	New	L2
Wild Guide	13 x 30 mins	•	•	WBI	New	C20-D19

■ DOCU-DRAMA

Road Rules	13x30 mins	•	•	MTV	Return	L20,M19,L22,M21
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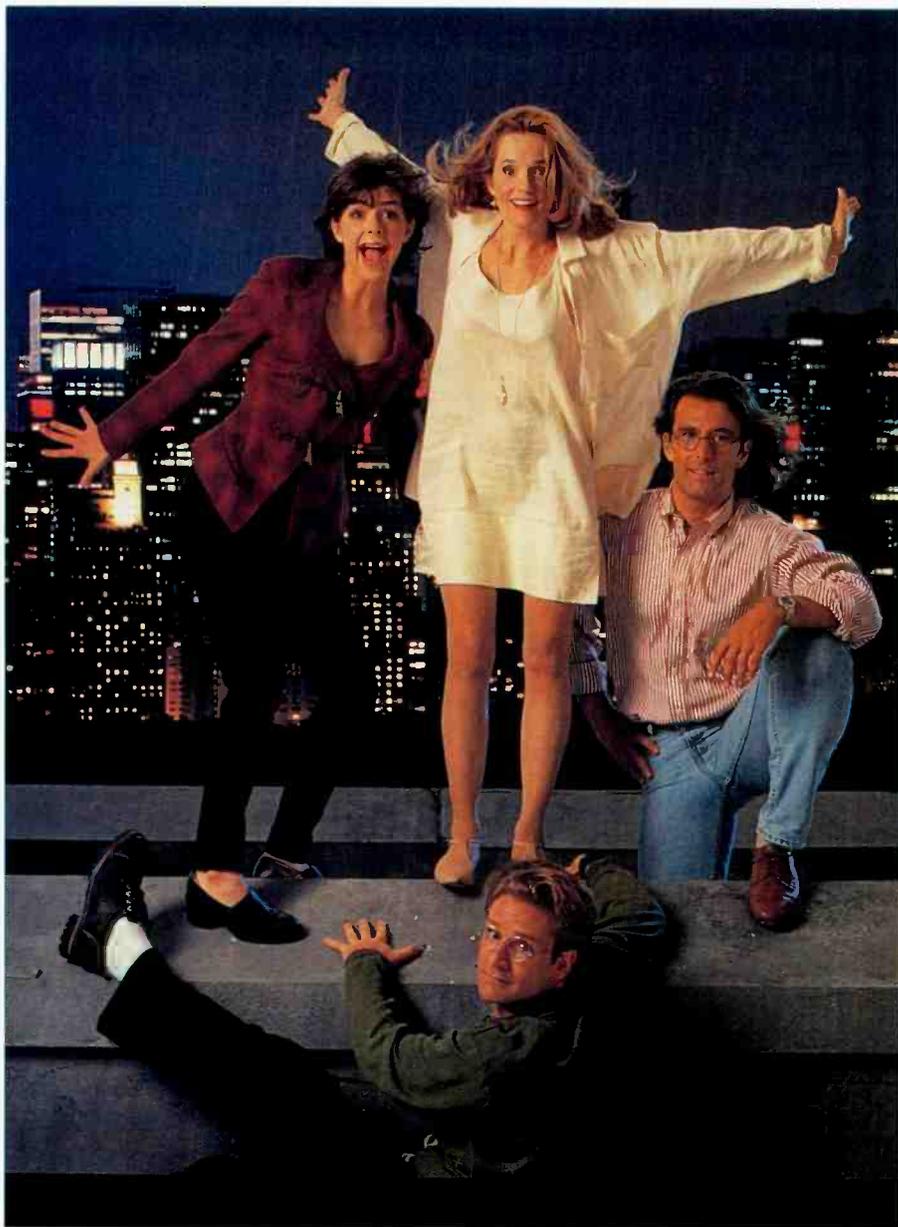
■ DRAMA

An Element of Truth	Feature	•	•	Saban International	New	H10/J9
Arther Rimbaud	22x90 mins	•	•	SFP Productions		B8
Avenging Angel	2 hrs	•	•	Turner International	New	
B Comme Bolo	1x90 mins	•	•	SFP Productions		B8
Baywatch Nights	22x60 mins	•	•	All American Fremantle Int'l	New	M38, N37
Charlotte Dite Charlie	1x90 mins	•	•	SFP Productions		B8
City Hall	2 hrs	•	•	Turner International	New	
Courthouse	13x1 hr	•	•	Columbia Pictures TV	New	
Crocodile Shows	7x1 hour	•	•	Chrysalis Distribution	Return	
Dalva	2 hrs movie	•	•	Hallmark Entertainment	New	
Dark Secrets	Feature	•	•	Saban International	New	H10/J9
Dream Big	26 x 30 mins	•	•	4Kids Productions	New	

PRODUCT TITLE	EPISODES	RIGHTS			DISTRIBUTOR	NEW OR RETURNING	STAND NO.
		TV	Theatrical	Video			
Fire Series I & II	26x1 hr	•			Beyond Distribution	New	D2
Flipper	22x1 hr	•	•		Samuel Goldwyn	Return	L33
Forbidden Memories	1x2 hrs	•			MTM International	New	N31, level 5
Ghostwriter	74x30 mins	•			CTW International TV Group	New	K26/L25
Gulliver's Travels	4x1 hr miniseries	•	•	•	Hallmark Entertainment	New	
Harlequin Alliance Romance Collection	2 x 60 mins	•			Alliance Communications Corp.	New	
Heavy Weather	1x90 mins	•			Chrysalis Distribution	New	
Hollyoaks	26x25 mins	•			Channel 4 International	New	H29
Invisible Man	26x30 mins	•	•	•	International Creative Exchange	New	14.15
L'Affa Bulatrice	1x90 mins	•			SFP Productions		B8
L'Amour Tague	1x90 mins	•			SFP Productions		B8
Liberty Street	26x30 mins	•			Atlantis Releasing Pty Ltd	New	B2
Masked Rider	26 x 30 mins	•			Saban International	New	H10/J9
Omerta, The Code of Silence	11x52 mins	•			Mediamax International	New	B34
Place of the Dead	102 mins	•			Brite	New	F14-G13
Raising Caines	6x30 mins	•			TriStar TV	New	
River of Hope	9x90 mins/ 18x95 mins	•	•	•	France Television Distribution	New	H2-J3
Road to Avonlea - The Final Season	13x1 hr	•	•	•	Sullivan Entertainment Int'l	New	E28
Scoop	52x52 mins	•	•	•	Mediamax International	Return	B34
Sheltering Desert	2 hrs	•	•	•	SIE	New	
Simisola	3x1 hr	•			CTE	New	H31/G34
Some Kind of Life	102 mins	•			Brite	New	F14-G13
Strike Force	90 mins	•			Brite	New	F14-G13
The Adventures of Pete and Pete	39 x 26 mins	•			Nickelodeon	Return	M19
The Cape	20x1 hr + 1x2 hr	•			MTM International	New	N31, level 5
The Colony	1x90 mins	•			All American Fremantle Int'l	New	M38, N37
The One That Got Away	102 mins	•			Brite	New	F14-G13
Traders	13x60 mins	•			Atlantis Releasing Pty Ltd	New	B2
Wind at My Back	13x1 hr	•	•	•	Sullivan Entertainment Int'l	New	E28
EROTIC							
Playboy's Really Naked Truth	4x1 hr	•			Playboy Entertainment	New	J-10, level 5
Women	13x30 mins	•			Playboy Entertainment	New	J-10, level 5
Women of Color	4x1 hr	•			Playboy Entertainment	New	J-10, level 5
FEATURE FILMS							
Coldblooded	TV Movie	•			PolyGram TV	Return	E14/F11
Dead Man's Walk	6x1 hr miniseries	•	•	•	Hallmark Entertainment	New	
Dis Moi Oui	1x105 mins	•	•	•	Lumiere	New	B19
Fight for Justice	1x120 mins	•	•	•	NBC International	New	F2/G1
Her Hidden Truth	1x120 mins	•	•	•	NBC International	New	F2/G1
Les Marmottes	1x105 mins	•	•	•	Lumiere	Return	B19
Paroles et Musique	1x107 mins	•	•	•	Lumiere		
She Fought Alone	1x120 mins	•			NBC International	New	F2/G1
The Lady	120 mins	•			Hearst Entertainment	New	L.29
The Price of Love	TV Movie	•			PolyGram TV	New	E14/F11
Trail of Tears	120 mins	•			Hearst Entertainment	New	L.29
GAMESHOWS							
Balls on the Run	6x3 mins	•			SPI International	New	
Dingbats	30 mins	•			KW International	New	B20/C19
Family Challenge	65x1 hr	•			MTM International	New	N31, level 5
Goal Show	30 mins	•			SPI International	Return	
Hollywood Squares	30 mins	•			KW International	New	B20/C19
Masters of the Maze	40x30 mins	•			MTM International	New	N31, level 5
Pick Your Brain	26x30 mins	•		•	4Kids Productions	New	05.40
Poker Palace	30 mins	•			KW International	New	B20/C19
Risky Number	65x30 mins	•			CTW International TV Group	New	K26/L25
Singled Out	65x30 mins	•			MTV	Return	L20,M19,L22,M21
Wild Animal Games	40x30 mins	•			MTM International	New	N31, level 5
LIGHT ENTERTAINMENT							
Beyond 2000 - 11th series	30 mins	•			Beyond Distribution	New	D2
Blue Water Dreaming	30 mins	•			Beyond Distribution	New	D2
Bloopers Collection	Assorted lengths	•		•	SPI International	Return	
Circus Lights	13x56 mins	•			TransTel GmbH	New	K41
Clive James in...	6x52 mins	•			Chrysalis Distribution	New	
Clive James Grand Prix Show	1x52 mins	•			Chrysalis Distribution	New	

PRODUCT TITLE	EPISODES	RIGHTS		DISTRIBUTOR	NEW OR RETURNING	STAND NO.
		TV	Theatrical Video			
Day & Date	Daily 1 hr	•	•	WBI	New	C20-D19
E! Features	200x30 mins	•		E! Entertainment Television	Return	J14/K13
Extreme Close-Up	356x30 mins	•		E! Entertainment Television	Return	J14/K13
Film World	24 x 30 mins	•		Wexler Enterprises Inc	New	N11
Five Guys Named Moe	1x110 mins		•	VCI Programme Sales	New	M14
Front Runners	78x30 mins	•	•	Teleproductions International	New	N3
FYE!: For Your Entertainment	52x30 mins	•		E! Entertainment Television	Return	J14/K13
Hollywood Men	4 x 1 hr		•	CTE	New	H31/G34
Hot Bodies, Hot Locations	13x25 mins	•	•	M.C.Stuart	New	K29
In Focus	66x60 mins	•		E! Entertainment Television	Return	J14/K13
Les Miserables 10th Anniversary Gala	1x130 mins		•	VCI Programme Sales	New	M14
Man & Animal	1 x 1 hr	•	•	CTE	New	H31/G34
The Great Magic of Las Vegas	6 x 60 mins	•		Fox Lorber Associates	New	17.29/19.17
MINISERIES						
Airport	13x55 mins	•		TransTel GmbH	New	K41
Bye Bye Birdie	3 x 1 hr miniseries	•	•	Hallmark Entertainment	New	
Cancoon	4x90 mins	•		SFP Productions		B8
Danielle Steel's Zoya	2x120 mins	•	•	NBC International	New	F2/G1
Gone in the Night	2x2 hrs			ACI	New	K34
Kidnapped	4 x 1 hr	•	•	Hallmark Entertainment	New	
Les Filles du Lido	3x100 mins	•		SFP Productions		B8
The Blood of Others	6 hr miniseries	•	•	SPI International	Return	
MUSIC						
Bruce Springsteen	1x90 mins/ 1x30 mins	•		NBD Television Ltd	New	n/a
David Bowie - Glass Spider Tour	1x132 mins	•		NBD Television Ltd	New	n/a
Helter Skelter	25x40 mins	•		NBD Television Ltd	New	n/a
Music and the Mind	3x52 mins	•	•	Channel 4 International	New	H29
Power Play Cool Vibes	52x1 hr	•		Wexler Enterprises Inc	New	N11
Power Play The Acid House Mix	52x1 hr	•		Wexler Enterprises Inc	New	N11
Power Play Top 100	100x1 hr	•		Wexler Enterprises Inc	New	N11
Really Roxette	1x52 mins	•		SVT		A17
Rock Around the World	100x30 mins	•		Wexler Enterprises Inc	New	N11
Smash Hits Party 1995	1x60 mins	•		NBD Television Ltd	New	n/a
The Brit Awards 96	1x90 mins	•		PolyGram TV	New	E14/F11
The White Room	7x45 mins	•		NBD Television Ltd	New	n/a
REALITY						
Dinomania	4x1 hr	•		GRB Entertainment	New	
Scandals	13x30 mins	•	•	Teleproductions Int'l Ltd	New	N3
Seatek	18x30 mins	•		GRB Entertainment	New	
World of Wonder	26x30 mins	•		GRB Entertainment	New	
SCI FI/ACTION						
Robo Warriors		•	•	Republic Entertainment	New	
The Invaders	3 + hrs		•	Republic Entertainment	New	
SERIES/TELENOVELAS						
Days of Our Lives	7300+ x 1 hr			Columbia Pictures TV	Return	
5 Dernieres Minutes	29x90 mins	•		SFP Productions		B8
Friends Forever	140x60 mins	•		All American Fremantle Int'l	New	M38, N37
Golden Dream	90x1 hrs	•		Globo TV Network Brazil	Return	F20, F22 & G19
Guadalupe	269x45 mins	•		RTVE	Return	K2
Hang Time	13x30 mins	•	•	NBC International	New	F2/G1
Marielena	229x45 mins	•		RTVE	Return	K2
Nano	195x1 hr	•	•	Artear Argentina	New	M-1
Nestor Burma	21x90 mins	•		SFP Productions		B8
Sheik	120x1 hr	•	•	Artear Argentina	New	M-1
Shadow and Light	130x1 hr	•		Globo TV Network Brazil	New	F20, F22 & G19
Story of Love	180x30 mins/ or 130x1 hr	•		Globo TV Network Brazil	New	F20, F22 & G19
Tropicaliente	130x1 hrs	•		Globo TV Network Brazil	Return	F20, F22 & G19
Young and the Restless	5300+ x 1 hr			Columbia Pictures TV	Return	

PRODUCT TITLE	EPISODES	RIGHTS			DISTRIBUTOR	NEW OR RETURNING	STAND NO.
		TV	Theatrical	Video			
SPORTS							
1996 UEFA European Championships	31 matches	•	•	•	ISL Television	New	F42
1997/1999 IAAF World Indoor Ch'ships	3 days (each)	•	•	•	ISL Television	New	F42
1997/1999 IAAF World Ch'ships	9 days (each)	•	•	•	ISL Television	New	F42
1998 Asian Games	12 days	•	•	•	ISL Television	New	F42
1998 FIBA World Championships	12 days (each)	•	•	•	ISL Television	New	F42
American Gladiators	31x30 mins	•	•	•	Samuel Goldwyn	Return	L33
Asian Sports Extra	30x30 mins (4 years)	•	•	•	ISL Television	New	F42
Clear Water Big Fish	5x50 mins	•	•	•	M.C.Stuart	New	K29
Global Guts	26x30 mins	•	•	•	Nickelodeon	New	M19
High Adventure	26x30 mins	•	•	•	Fox Lorber Associates	New	17.29/19.17
Houston Live Stock Show and Rodeo	3x90 mins	•	•	•	SIE	New	
ISL World Sports Extra	bi-monthlyx52 mins	•	•	•	ISL Television	New	F42
Media Archive Library	Various footage	•	•	•	ISL Television	New	F42
Monster Wars	22x1 hr	•	•	•	4Kids Productions	New	05.40
Olympia	26x30 mins	•	•	•	SIE	New	
Real Results	1x75 mins	•	•	•	VCI Programme Sales	New	M14
Slam (Basket Ball)	30x26 mins	•	•	•	ISL Television	New	F42
Track Record '95	1x52 mins	•	•	•	ISL Television	New	F42
Wild West Showdown	13x30 mins	•	•	•	Samuel Goldwyn	Return	L33
TALK SHOWS							
Tempest	195x1 hr				Columbia TriStar TV Distribution	New	
THRILLER							
Cover Me	1x94 mins	•	•	•	Playboy Entertainment	New	J-10, level 5
Criminal Passion	Feature	•	•	•	Saban International	New	H10/J9
Playback	1x92 mins	•	•	•	Playboy Entertainment	New	J-10, level 5
Temptation	92 mins	•	•	•	Republic Entertainment	New	
TV MOVIES							
14 Million Reasons	2 x 60 mins	•	•	•	Alliance Communications Corp.	New	
A Family of Cops	2 hours	•	•	•	Alliance	New	
A Woman in my Heart	90 mins	•	•	•	Gaumont	New	TVF1
Change of Heart	96 mins	•	•	•	Sullivan Entertainment International	New	E28
Deadly Pursuits	1x2 hrs	•	•	•	ACI	New	K34
Farmer & Chase	97 mins	•	•	•	Arrow Films International	New	H4.20
Fearless Frieda	1 x 90 mins	•	•	•	WBI	New	C20-D19
Forbidden Seduction	1x2 hrs	•	•	•	ACI	New	K34
Giant of Thunder Mountain	100 mins	•	•	•	International Creative Exchange	New	14.15
Heck's Way Home	1x95 mins	•	•	•	Atlantis Releasing Pty Ltd	New	B2
Nothing But the Truth	1x95 mins	•	•	•	Atlantis Releasing Pty Ltd	New	B2
PAC Movie Library	10xvarious	•	•	•	All American Fremantle Int'l	New	M38, N37
Paradise Run	95 mins	•	•	•	Arrow Films International	New	H4.20
Paris or Somewhere	1x95 mins	•	•	•	Atlantis Releasing Pty Ltd	New	B2
River Rats	2 hrs	•	•	•	Sullivan Entertainment International	New	E28
Second Chance	approx 90 mins	•	•	•	International Creative Exchange	New	14.15
Secret Weapon	94 mins	•	•	•	Revcom International	New	
The West Side Waltz	1x2 hrs	•	•	•	ACI	New	K34
Trial by Fire	1x2 hrs	•	•	•	ACI	New	K34
The Rosamunde Pilcher Collection	10x90 mins	•	•	•	ZDF Enterprises	New	E5, level 5
Under the Piano	2 hrs	•	•	•	Sullivan Entertainment International	New	E28
VARIETY/SPECIALS							
Penn & Teller's Phobophilia	1x52 mins	•	•	•	Channel 4 International	New	H29
Top Models	5x52 mins	•	•	•	France Television Distribution	New	H2-J3
WILDLIFE/NATURAL HISTORY/ENVIRONMENTAL							
Angels of the Sea	2x45 mins	•	•	•	M.C.Stuart	New	K29
Australia's Endangered Species	2x45 mins	•	•	•	M.C.Stuart	New	K29
A Cry from the Wild	12x26 mins	•	•	•	Mediamax International	Return	B34
From Monkeys to Apes	12x25 mins	•	•	•	Revcom International	Return	
Visions of Nature	6x45 mins	•	•	•	ZDF Enterprises	New	E5, level 5
Zooflife with Jack Hanna	52 x 30 mins	•	•	•	International Creative Exchange	New	14.15



Strange but true: NBC execs are toasting the success of *Caroline*. As are their network rivals

Partners A-Plenty

The elimination of the rules barring U.S. networks from investing in the programming they air has the Big Three scurrying to sign up production partners. The networks want hits, and they want the big score in domestic syndication. Rich Zahradnik asks where that leaves their international distribution companies

C*aroline in the City* is hot. The NBC sitcom is the highest-rated new show this season, sitting in fourth place overall when the season-to-date ratings were totted up at the end of October.

Everyone expected *Caroline* to do well; it had, after all, been given the best starting slot of any new show this season, sitting between hits *Seinfeld* (currently number two on the ratings chart) and *ER* (number one).

NBC executives are now rubbing their hands together at the thought their Thursday night fortress remains secure, if not impregnable. So are NBC distribution executives, since they own a small stake in the show. And so are CBS Entertainment Productions executives, since they're the producers of *Caroline*.

This strange-but-true tale of network cross-pollination began with CBS Productions developing *Caroline* as an in-house production for the CBS network. When CBS network executives passed on the series, NBC picked it up, in the process gaining a small financial participation when it cast movie star Lea Thompson, under contract to NBC, in the lead.

NBC and CBS executives can now, together, hope and pray *Caroline* becomes the kind of hit that lasts a minimum of four seasons so it can go out into domestic syndication and reap a \$300 million or \$400 million payday. Rainer Siek, president of CBS Enterprises, which is distributing the sitcom overseas, claimed it's already selling on the international market for "the highest prices... somehow it is pretty culturally neutral."

And does he find it weird to be cheering on an NBC show? Like most executives at beleaguered CBS, he's got bigger worries. "I'm sitting on Thursday still crossing my fingers for (CBS's)

Wednesday night," he joked.

A staggering amount of partnering has gone on since it became clear the rules barring American networks from investing in and syndicating entertainment programming were regulatory history. Networks are in bed with studios; networks are in bed with networks; studios are buying networks, and the hottest independent writer-producers are being chased



Siek: fingers crossed

across Hollywood by network executives waving joint venture contracts. The demise of the financial interest and syndication (fin-syn) rules has ushered in a strange age of convoluted partnerships, mass talent raids and the occasional mega-merger.

Caroline isn't the only cross-network oddity. *NewsRadio*, another NBC sitcom, is part-owned by ABC through Brillstein-Grey Communications, the tv production company Capital Cities/ABC formed in 1994 with Brillstein-Grey Entertainment in anticipation of the coming regulatory change.

Since the two newest networks, the United Paramount Network and the Warner Bros. Network, along with the established fourth network, Fox Broadcasting Corp., are all owned by studios, crisscrossing deals among networks and studios, all airing each other's product, are bound to become commonplace. And, of course, the biggest partnership of them all, the link-up of Cap Cities/ABC and The Walt Disney Co., could only have happened with the elimination of fin-syn. Despite Disney's stated desire to use ABC airtime for its shows, like any other studio, it presumably will sell shows to the other networks.

The growing Gordian knot of partnerships is the result of what was a simple regulatory change. The Federal Communications Commission had barred the networks from producing programming or taking financial interests in the shows they aired because that would give the networks inordinate power over their suppliers. First, the FCC dropped the rules against networks producing for themselves. Then, with broadcasting a much more diverse business than when fin-syn was imposed in 1970, the FCC lifted the fin-syn rules as of this September.

That eliminated the impediment to a studio and a network getting together. In international distribution, everyone in the industry expected to see the networks' catalogs continue to expand beyond news programming and tv movies to include a greater proportion of series. Opponents of the change – independents and studios alike – remained convinced the networks would coerce producers to give up stakes in the shows the networks aired.

That the latter hasn't happened yet, and that the changes have been a little on the weird side – one network airing shows from the two others is, after all, pretty weird – is testament to the fact that one thing hasn't changed in American broadcasting: the business is still about winning the ratings race.

Networks may want to hold a ticket for the great domestic syndication lottery, and they may want more of a share of the revenues from international distribution, but never at the expense of their position in the ratings

Networks may want to hold a ticket for the great domestic syndication lottery, and they may want more of a share of the revenues from international distribution, but never at the expense of their position in the ratings. Why?

Well, just suppose a network executive were cajoled by his production colleagues to schedule a show because the network owned it. Imagine the show turns out to be weak, underdelivering for its time period, undermining the ratings for the entire night within weeks of its premiere. A couple little mistakes like that and a network begins the slide from first to third, or even fourth.

The number one U.S. network can expect gross annual earnings of \$250 million to \$300 million, while the network in third will break even, or if lucky, show modest profits. That's a lot of money to bet in the hopes one show you own will be successful long enough to make it into syndication.

"What is important to people at the network is what (shows are) going to perform on the ABC television network," said Maria Komodikis, president of the ABC Distribution Co. since September. Komodikis knows from first hand what

that can mean. The ABC-owned series *My So Called Life* was a strong seller around the world, with every major territory picking up the hour drama. Still, it didn't win the audience for ABC and was canceled.

"The network business is just too god-damned competitive in the U.S. for you to keep shows on the air," agreed Marion Edwards, executive vice president of 20th Century Fox International Television. "You buy from the people who you believe can provide the strong programming for your schedule."

Early experience has bred caution. None of the Big Three has produced a hit since they won the battle over fin-syn two years ago. *Caroline in the City* may well turn out to be the first – ironic, in that the three networks hold ownership positions in fewer shows this season than last.

None of this, of course, means the networks, in the drive to win the ratings battle, are oblivious to the financial attractions of the domestic syndication market. If they keep throwing up shows that they either produce or own a piece of, one of them is bound to become that long-running hit that then moves into the secondary market.

In a recent report, NatWest Securities noted, "The ability of the networks to participate in this revenue stream in the future could do two things: significantly reduce the historically large cyclicality of a network's earnings; and second, substantially increase (potentially dwarf) the underlying average historical profitability of a network over time."



Komodikis: ABC priority

The network's international distribution outfits are benefiting. They get more product as in-house production arms make more shows and, sometimes, they get the international rights out of the partnerships. Each network is approaching the marketplace in a different way; their strategies differ radically so it makes sense to look at each one individually.

John Agoglia, president of NBC Enterprises, is pitching NBC to writers and producers as the smart place for independents to do a deal in light of the jumbo-sized acquisitions that have occurred this year. "From NBC the

goliath," he said, "with all the other merger activity out there, we've turned into NBC the boutique."

NBC puts the emphasis on creating partnerships that are right for both sides. "The fact is anything is possible within a business arrangement," Agoglia explained. "Once you enter into a partnership, then it's not fighting about who gets what; then it's about evaluating how the partners can maximize the value of their assets." So far, most of the deals have seen NBC Productions "in association with" other companies, with NBC taking a piece of individual shows in joint venture with companies ranging from Belisarius Productions and Paramount (*J.A.G.*) to Castle Rock (*The Single Guy*) and Baltimore Pictures (*Homicide*). In each deal, the distribution rights NBC receives vary.

Disney's acquisition of Cap Cities/ABC will create a combination that has analysts and commentators drooling. They all expect Disney to get first call on



Edwards: movie magic

ABC airtime; it's already clear that will happen with Saturday morning children's programs. But will ABC and Disney forget the lesson the networks have already learned, the lesson that it takes a host of suppliers to build a successful schedule?

"It's too early to really figure out whether ABC will only be buying from Disney," noted Agoglia.

Interestingly, ABC already has some high-profile production partnerships in place. In fact, the company seems to have consciously moved away from in-house production to co-ownership of shows made by these top-line entities. The partnerships include the joint venture tv studio Brillstein-Grey Communications and a new five-year production partnership with Jim Henson Productions (Henson is keeping foreign rights under the deal). The highest profile of ABC's deals – a tv studio it's supposed to be setting up with DreamWorks SKG – likely won't happen, given the personal animosity between DreamWorks partner Jeffrey Katzenberg and Disney chairman-CEO Michael Eisner.

Even without DreamWorks, Disney and ABC will have a tremendous catalog

to peddle. Very likely, ABC Distribution will find itself in some way merged into Walt Disney Television International, the international distribution, production and broadcasting unit headed by Etienne de Villiers.

For her part, Komodikis at ABC Distribution is doing her job selling ABC's shows and waiting to hear what will happen. "How the distribution is actually done in the future, I think really is up to the people who are going to look at everybody and see how we are going to use our resources... Everyone is waiting to see what will happen."

CBS executives are waiting and watching too, but, at least in the international area, with perhaps less concern. Westinghouse's purchase of the network will bring changes, but CBS's international arm seems safe.

Overall, CBS has been less oriented to setting up the new kinds of high-profile partnerships the end of fin-syn allowed, yet at that same time has been the most aggressive producing in-house on its own or in partnership with a writer-producer.

"We have quite a number of programs on the air," said CBS Enterprises's Siek. "As a matter of fact, we're selling right now one-third of the CBS primetime schedule. So the amount of programming we're selling has increased greatly." CBS is producing or co-producing seven hours of programming – including its entire Saturday night. Shows range from drama *CPW* to sitcoms *Dave's World* and *Can't Hurry Love* to news shows *60 Minutes* and *48 Hours*.

Siek expects Westinghouse to have a positive effect on CBS's international thinking, since the conglomerate already does a great deal of business overseas. Siek is also responsible for domestic syndication, and that is where the merger could bring changes; Westinghouse's Group W Broadcasting arm already has a big syndication operation.

Fox Broadcasting Corp. was never affected by the fin-syn rules since it never became a network under the FCC's definition while the rules were in place. In fact, Marion Edwards noted, "Fox

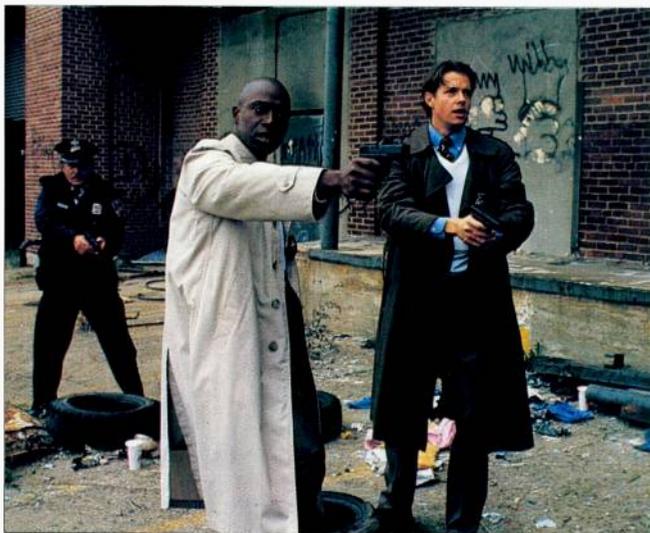
has been allowed to do the kinds of things you see the networks trying to do."

The X-Files, a Fox-produced show that airs on the Fox network, illustrates how good things can be when the whole system works. The sci-fi series is performing well for the network, selling strongly overseas and is on its way to lasting long enough to go into domestic syndication. And, because of the international revenues, production executives at Fox know they can afford to invest that extra bit in the show, producing it with a quality critics and viewers have noticed.

Of course, this would be true even if *X-Files* were a studio show that aired on another network, but it surely must warm Rupert Murdoch's heart to know all the revenues stay home at Fox. Yet, Edwards cautioned, not even *X-Files* would be immune to ratings-driven imperatives. "If it fell off the network, we'd all start lobbying for two-hour movies" that could be sold around the world.

The clear advantage Fox International TV has over its network distribution rivals is feature films. "It's going to be terribly tough for any distributor to break through to the big leagues without feature films," Edwards said. "They're what play on every network in the world."

Fox really has the best of both worlds: network ownership and feature films feeding the tv distribution arm. But that will change when Disney links with ABC. And it will change further if either UPN or WB survive to become real networks. In the next two years, change will be a constant at all the companies that distribute programming for U.S. broadcast networks. **TELEVISION BUSINESS INTERNATIONAL**



NBC is benefiting by association on series like *Homicide*

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New face: Redesigns like PSF's work for Pro 7 aren't just about eye-catching logos

Image Conscious

Design consultancies specializing in tv aren't telling broadcasters how to make better programs. But they can make an impact on their ratings. Using the bits between the shows to create or enhance channel branding and create a competitive advantage too. Tim Westcott reports

What makes a channel successful? Strong programming, good management, or well-designed T-shirts?

Most broadcasters would agree with the first two propositions, but might have trouble with the third. But they would be wrong, according to design consultants, to underestimate the importance of their image with viewers, to pay the sort of attention to detail which ensures that those promotional T-shirts don't fall apart after one wash. In the highly competitive tv market, image counts for more and more.

The point designers make is that the investment in design, however high, pays off. According to Gilles Galud, president of Gédéon, France 2 saw a 5%

improvement in market share after its rebranding without any change in its schedule. Ratings for RTL's news programs have gone up since Novocom's redesign, claimed Martin Poole, managing director of Novocom's London office – again with everything else untouched. While Pittard Sullivan Fitzgerald (PSF)'s success story is Pro 7, which enhanced viewing figures and its profile with media buyers after its makeover last year.

Design practices like the UK's Lambie-Nairn & Company have capitalized on broadcasters' increased awareness of the need for branding, as well as the increased numbers of broadcasters. It's notable that Lambie-Nairn's current client list of 25 broadcaster clients includes

only five that were in existence when the company was set up in 1976.

The exploding logo for Channel 4 was a pivotal piece of work for Lambie-Nairn, propelling it to the forefront of tv design when the network launched in the early 1980s. The multicolored 4 logo, representing the channel's objective of serving minority audiences, is still in use.

Remembered Martin Lambie-Nairn: "It was in the days when there was no such thing as brand identity in television." The logo was "a simple graphic design solution to a problem," using computer animation people hadn't seen before as well as design techniques already familiar in other industries.

"In nuts and bolts factories they had

been doing that sort of thing for a long time. It's just that it was new to television."

Although the Channel 4 work opened doors for Lambie-Nairn in the years that followed, his gospel of design sometimes fell on deaf ears. The problem with design is that it's a matter of taste, and often the people making the decision were inflexible. "Our world is the world of the subjective. That's the world we were wandering about in after Channel 4 for a while. You could do a ton of work but somebody would say 'yes, but my favorite color's pink'..."

This sort of experience has altered the way design specialists approach their task. As with most advertising creatives, research has become a valuable weapon in making the process a little more scientific.

An extensive period of research is now a prerequisite of any major channel redesign. PSF's approach is fairly typical. The preferred first point of contact is at board level. "We deal primarily with chairmen and presidents, to find out what their strategic goals are: Where they want to go, how realistic are their expectations (about) a design package," said Rick Grossman, PSF's international vice president. The research phase "is really an internal look at how the network or channel is operating."

In this phase, designers draw on the internal resources of the company such as research departments, designers and programmers. If the budgets are available, they will also carry out research among consumers into the channel's existing profile and onscreen identity.

All of this gives the agencies ammunition to present proposals which may sometimes not quite agree with the broadcaster's own ideas.

"A lot of people have logos that they've had for 20 years that were designed for print, and whether they work on television or not is another story. What we try to do is to bring as objective a view to the process as we can," said Grossman.

This stage can take time. Lambie-Nairn's redesign job on the BBC's two channels started in 1988, three years

before the new identities went on screen. PSF spent four months analyzing Pro 7 before it drew a picture, said Grossman. Other assignments – such as a simple package of designs, or the annual revamps favored by U.S. channels – can take less time.

Although design has become very competitive, companies dislike having to pitch for business in the way advertising agencies do. Credentials pitches – where agencies present their past work and explain their methods of working – are preferred. "We don't take part in beauty contests," said Grossman, although 80% of broadcasters in Europe, he reckons, approach the task in this way. "They want you to draw the pictures first and then come up with a design package and then come in and sell your package. That's an impossible task."

Darrell Pockett, creative director of UK company English and Pockett, which handled A&E's rebranding exercise last

going to animate," said Novocom's Martin Poole. "You try to storyboard as closely as you can so you're not wasting post-production time, which is the most expensive part of the job, later on."

"we'll use an old stick dipped in a pot of paint if it's the right answer"

The function of a good identity – from on-screen logo to T-shirt – is to embody the goals and directions of the channel. In theory, the type of medium used for the design – live action, 3D or computer graphics, or even "an old stick dipped in a pot of paint if it's the right answer," joked Lambie-Nairn.

Some designers draw a distinction between the style of the LA-based groups PSF and Novocom and the Europeans like Lambie-Nairn and France's Gédéon. Gilles Galud commented Novocom's logos are "very distinctive, very American. They often use the same techniques, the same shapes, the same effects."

For some clients in Europe, the American look can be the attraction. BSKyB's chief executive Sam Chisholm approached Novocom because he liked their work for *CBS Evening News*.

Poole called the Novocom look "very commercial. It's meant to deliver viewers. We wouldn't do a Pro 7 or a Channel 4 because most of our work is directed towards a mass audience rather than a niche audience." The work Novocom does in the U.S. for clients like CBS

News and Paramount shows

Entertainment Tonight and

Hard Copy is designed for a

market where every show starts at the top of the hour and the important thing is to grab viewer's attention quickly. The teasing style of some European idents simply wouldn't work on U.S. tv, believed Poole. "We tend to use computers because it's more controllable. And we believe that a purely graphic look... won't date as quickly as live action."

"I'm not sure viewers need to be attracted by big effects," said Galud. "They are more and more smart, more and more informed

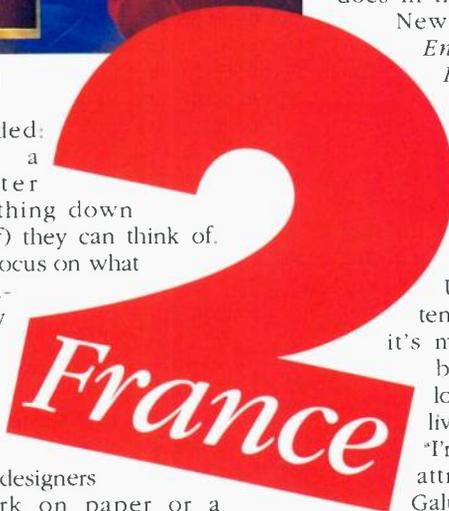
about design." Gédéon has worked for the youth-slanted channel M6 since 1989, and created an aggressive, graphics-based design. When it rebranded Antenne 2 and FR3 as France 2 and 3 in



Hard and soft: Novocom vs Gédéon

year, added: "Normally a broadcaster puts everything down (in the brief) they can think of. They don't focus on what their aspirations really are."

Once those aspirations have been teased out, designers get to work on paper or a Macintosh, attempting to come up with idents that put the findings of the research into visible form. Design is a matter of "creation or evolution of a logo in pure print form then working out how that's going to work on air, how it's





A&E: A rare job stateside for a Brit agency

1992, it decided "to do something smoother, more gentle, more realistic." The commercial break opens use the soft graphic logos of both channels combined with live action films – people on France 2, landscapes on the regional France 3.

PSF's work for Pro 7 – a package of 90 minutes of material – included a new logo, promos and program opens leading through the day's schedule. The channel's head of on-air promotion and graphics, Marcel Mohaupt, said there were some initial cultural differences. "The color palette in America is not the same as in Germany... We don't use purple that much in Germany. The Americans love this color. It's an older people's color, and Pro 7 is a very youth-oriented channel." Another proposal integrated the German flag. "We said this is impossible, we don't use our flag in design. We have a history. We are not as proud of our flag as the Americans are."

Mohaupt added there would probably have been the same cultural differences with a French or English design company. Once PSF had got closer to Pro 7's way of thinking, "we had a very good relationship."

Novocom and PSF both have their own production offices in Hollywood, equipped with an array of technology such as Henry, Harry, Paintbox and



Lambie-Nairn's overhaul of the BBC took three years

Flame graphics computers. PSF's facility includes 16 Quantal Paintboxes and 94 Macintosh PCs. Both companies link up their overseas offices and clients via modem lines so that they can send examples of work in progress online. "The first thing we do when we sign on a client is take our software and install it on their Macs," said Grossman.

Where in-house design departments have their own hardware on site, companies will often send in their own design-

ers to work on a brief. CBS has even subcontracted most of its work to PSF, which has eight of its own staff working full-time in a suite installed by the broadcaster. But it's rare for companies to handle day-to-day assignments, which are normally done in-house. Companies can also advise on how those departments should be structured: Lambie-Nairn helped the BBC reorganize its department and the company is still retained as a consultant. Novocom helped BSkyB set up a large in-house design unit for its growing stable of satellite channels.

The first question many broadcasters ask is how much a redesign costs. Most companies quote prices starting at \$100,000, ranging up to as much as \$6 million. The choice of graphics can be a major factor, and many designs call for the use of 35mm film. But there seemingly isn't a way of cutting the cost of post-production by using facilities houses in parts of the world where rental and staff costs are lower.

According to Poole, a typical bill for a station in France or Germany would be around a quarter of a million dollars for a main identity and a package of promos and break-bumper formats. But opens for specific programs or segments would be extra. Novocom is creating idents for the two CME-backed stations launching this month in Slovenia and Romania, and is looking into ways of making the packages cheaper by leasing its designs, according to Poole.

Whatever the cost, it is true that designers are content to be gauged by their impact on the ratings. "I don't think design alone is going to give people good ratings," said Poole. A channel with bad programs won't do well just because of its ident. "But when there is more

of a level between the stations, then it can give you an edge."

The Dow Jones/Flextech-backed satellite channel European Business News (EBN) used Lambie-Nairn to help create branding for a channel which was aimed at people interested in or working in finance, but not one attracted to a sober-suited style. According to Frances Whitehead, EBN's marketing director, its research shows that although its viewers were news junkies who tended to take all of the international news channels, EBN came out top for style. "Our audience is mainly male, youngish high-earners, aspirational. That's what we were targeting and that's what we're getting. So the look and feel that we have is definitely appealing to those people."

As more channels launch, design companies are evolving to cope with organizations which are more aware of



EBN's styling helps it stand out from a crowd

the importance of design and promotion to send a clearer message to their audience, their advertisers, ad agencies, and even suppliers and regulators. The message – the brand – is also one which needs to travel beyond the screen into print form, even into buildings and vehicles. And even T-shirts. They are also evolving into interactive media.

Gédéon has branched out into designing a CD-Rom for France Télévision International which will be launched at next year's Natpe. English and Pockett and PSF are working on designing interactive channels for the telco-backed programming venture Tele TV.

Investment in branding pays off. One of Lambie-Nairn's cheaper jobs of recent years was an ident for a British cable channel. The cost came in, under budget, at £35,000 (\$55,000). The channel doesn't exist any more but the logo was recently sold to a production company. The price? A cool £1 million.

That's a value any broadcaster would understand. [E]

Channel Surf Is Net Surf

Intercast will deliver the Web via tv signals... Vyvx sets up interlinked video servers...getting online on cable

A diverse group of media and technology companies plans to bring together broadcast programming and Internet content to allow users simultaneously to channel surf and Web surf.

The technology to do it is called Intercast, and the companies promoting it include Intel, America Online, Asymetrix, Comcast, En Technology, Gateway 2000, NBC, Netscape Communications, Packard Bell, CNN Interactive, QVC, Viacom and WGBH Educational. The group plans to develop the technology, PC platforms, software applications and content for distribution by the middle of next year.

InterCast will work by sending Web-like pages in the vertical blanking interval (VBI) of the tv signal. Users who feed a tv signal — over-the-air or cable — into their PC will see a broadcast window in the upper left hand corner of their Web browser (a Web browser is a program used to navigate the World Wide Web on the Internet), while the Web pages will provide data displays, like sports stats and tour schedules. With the browser software and a separate connection to the Internet, users will be able to roam to other pages with similar information on them. Presumably, they'll also be able to send mail and participate in chat groups.

The Intercast group is shooting for a standard whereby consumers will be

able to buy the appropriate pre-configured PC, stick their cable or antenna connection into the back of the PC and away they'd go. Upgrade kits may be sold as well.

Chip manufacturer Intel is developing a series of protocols and data formats that will allow the transmission of data along with a television broadcast, and reception of that data by PCs equipped to do so. Working prototype systems are currently being tested in Portland, Oregon, metro area households.

On Oct. 10, KGW, Portland's NBC affiliate, successfully completed the first live transmission of broadcast video and Web pages to an Intercast-enabled PC. Nationwide testing will begin in February. Initially, Intercast technology will be developed and deployed in the United States; international broadcast standards will require different hardware and software and will come later.

Linking Servers

The marriage of fiber, teleports and a developing video server program is helping Vyvx Inc. blaze a trail across borders and oceans. For five years, Vyvx had offered point-to-point video backhaul capacity across a network of fiber-based switching centers, providing services to local and national sports, news and live event producers. In recent months, Vyvx has radically expanded the types of services it offers to producers

and distributors looking to move programming around the U.S. and the world.

First, Vyvx took advantage of fiber across the Atlantic Ocean to offer transmission capacity to anyone already served by British Telecom in the UK. Then, Vyvx added component video capability to its network for higher picture quality and picked up four teleports, allowing the company to handle forward distribution as well. It also linked up with Teleglobe in Canada.

All these enhancements will contribute to the key component in the company's expansion program. Vyvx is working with IBM, Sun Microsystems and Sybase to develop video archive database systems. Simply put, video servers linked to Vyvx's fiber and teleport transmission systems will allow for content to be stored locally on servers and distributed internationally.

Del Bothof, president of Vyvx, said his company's Archiver network will serve three distinct markets. First, post-production houses in different cities working on the same project will take advantage of the ATM interconnection provided by the network. Second, the programming distribution business will use the system to upload and download programming, infomercials and commercials to any market served by Vyvx, BT or Teleglobe. And third, the corporate training market will

use the system as a "kind of a broadband Internet," he said, "delivering training materials to the medical and business markets."

TCI's @Home Goes Home

Cable giant Telecommunications Inc. has announced that it will begin trials of its get-the-Internet-via-cable service, @Home, in Sunnyvale, California, sometime in April 1996.

One of the unique aspects of @Home's design is that TCI will place PCs with massive hard drive storage capability at cable systems' head-ends. These on-site PCs will supplement the actual Internet link with an archive of a large percentage of World Wide Web content. Small computer programs will constantly move data from the "live Internet" to the archived one. This design would, in theory, reduce each cable system's demand on the Internet, reducing delays in delivery of content to the individual consumer. This enhancement will come on top of speed improvements offered by delivery of data via cable, which can carry Internet material at blazing speeds compared with telephone lines and even the fastest of modems.

The @Home service will require the individual consumer to have an ethernet card (an inexpensive networking card not normally found in home PCs) and a cable modem. 

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Pay Dream Believers?

A new report on the future of pay-tv in Europe predicts the market could be worth \$14 billion by the year 2000. However, such predictions are highly optimistic, argues Jean-Luc Renaud

In 1994, Western European pay-tv subscription revenues amounted to approximately \$3.5 billion, according to investment house Lehman Brothers' recent report, *European Pay-TV: Digital Evolution*. By the year 2000 this figure could be anywhere between \$9.1 billion and \$14 billion, depending on which of Lehman Brothers predictions is to be believed.

In the report's most optimistic scenario, pay-tv penetration would increase from the 1994 level of 9% (12 million subscribers) to 25% (35.7 million subscribers), while revenue per subscriber, which in 1994 averaged \$27 a month, would increase by 5% per annum. If however, penetration was to increase to just 16.4% by the year 2000 (23.4 million subscribers), total revenues would still grow by more than 125% over the next five years to \$9.1 billion, even if revenue per subscriber grew by just 2.5% per annum.

The attraction of producing several scenarios is that the analysts can never be wrong. However, it is less than helpful for the end-users, especially if no rigorous reasoning is provided to substantiate each of the scenarios. It is also dangerous to be right for the wrong reasons. But, with figures so remarkably high, we suspect that Lehman Brothers are just plain wrong.

For the body of its report, the analysis settles on a medium-range scenario, namely, a pay-tv penetration that "could reasonably approach 20% (28.5 million subscribers) by the year 2000, producing revenue in excess of \$10 billion..."

What informs this outrageous optimism is the "information superhighway" syndrome. Given the ongoing stream of privatization and the increasing pace of deregulation, coupled with the continuing development and application of advanced technology, the gradual convergence of global media, telecommunications and technology industries is set to accelerate, says Lehman Brothers in its investment summary. Electronic and digital forms of information transfer and storage, enabling the creation of high capac-

ity, two-way communication networks, are rapidly accelerating the integration of text, vision and sound. The multimedia age is dawning and corporate positioning and investor interest is gathering momentum.

If it is a general description of things to come in the long term, we have little disagreement with Lehman Brothers' vision. But why this evolution should have such a positive impact on the growth of pay-tv, and in such a short term (the next five years), escapes us.

When it comes to pay-tv, where is convergence, multimedia, or the global vision? If anything, the pay-tv broadcasters behind the various forthcoming satellite digital bouquets are, with some

pay-tv broadcasters to break new grounds in the multimedia interactive sphere. And their attempts at locking individual country markets through control of multiple proprietary conditional access systems does not translate into a global vision.

"Successful pay-tv operators essentially require four key ingredients," say Lehman Brothers – a secure supply of attractive, preferably exclusive, programming; a means of distributing that programming to as wide an audience as possible; a conditional access technology to prevent unauthorized access to it; and a subscriber management system to maximize access to it, collect subscriptions and minimize churn.

Pay-TV Penetration (%)

December	Growth	1994	1996	1998	2000	2002	2004
GERMANY	12.2	2.8	6.9	9.3	12.0	13.8	15.0
UNITED KINGDOM	22.2	17.8	22.3	28.5	34.6	38.6	40.0
FRANCE	5.4	19.6	21.1	22.6	23.7	24.5	25.0
ITALY	11.8	3.2	4.2	6.3	9.8	13.1	15.0
SPAIN	16.7	8.3	10.8	15.5	19.9	22.9	25.0
NETHERLANDS	16.8	3.2	7.0	10.7	14.1	17.2	20.0
BELGIUM	11.4	8.6	11.2	13.7	16.0	18.1	20.0
SWEDEN	6.2	11.3	12.7	14.1	15.3	16.5	17.5
PORTUGAL	11.7	0.8	2.1	4.4	7.9	11.1	12.5
AUSTRIA	11.3	1.2	3.8	6.2	8.5	10.6	12.5
SWITZERLAND	9.1	3.4	5.5	7.4	9.3	11.0	12.5
DENMARK	13.2	4.3	7.3	10.2	12.9	15.3	17.5
FINLAND	15.1	2.4	5.8	9.1	12.2	15.0	17.5
NORWAY	11.8	5.7	8.4	11.0	13.4	15.6	17.5
IRELAND	7.3	5.2	6.8	8.4	9.9	11.3	12.5
TOTAL	13.0	8.8	11.6	14.7	17.9	20.3	21.7
Annual growth			1.5	1.6	1.5	1.1	0.6

Source: Lehman Brothers

exceptions, the least interested in convergence. The content of their near-video-on-demand (NVOD) digital services barely goes beyond the tried-and-tested menu of movies and sport. Because of satellite's limited two-way transmission capability, do not expect

All these have been available to the existing pay-tv broadcasters for many years, and indeed, presided over their growth. But the time of substantial increase in pay-tv penetration is no longer. In France, the terrestrial encrypted service of Canal Plus has reached sat-

uration with four million subscribers. The 260,000 subscribers to Canalsatellite have been reached in over two years – not a stellar performance, especially compared with the estimated 750,000 French tv homes targeting the free-to-air Astra bouquet. Counting on (slow) cable growth for program delivery is not going to reach the gap between Lehman Brothers' forecast figures and the reality.

In the UK, BSkyB's program bouquet is now received by 3.4 million tv homes, of which 2.8 million subscribers take up the premium services. But the penetration of DTH antennas, at about 3.2 million, is slowly reaching its apex and the growth of cable tv is plagued by a low connection rate (20%) and high churn (up to 50%).

Germany apparently meets the conditions for high pay-tv penetration: 15 million of the 24 million tv homes passed by cable are connected to the network, and Astra satellite DTH penetration is now at eight million and growing fast. However, the only pay-tv channel, Premiere, is badly underachieving its publicized target, with a subscriber base around 900,000.

Lehman Brothers finds Premiere's very low penetration of the German market "rather surprising." It is no surprise to those who know this industry better. Movie-based Premiere does not make inroads because German viewers have already a great quantity of films available to them from the large number of free-to-air terrestrial and satellite services.

The same is true of the Benelux countries where cable tv has already reached saturation point. FilmNet's pay-tv offering is taken up by an estimated 550,000 tv homes to date while Canal Plus' Belgium service has attracted over 160,000 subscribers so far. Here again, growth is extremely slow.

Scandinavia is a relatively good market for pay-tv with over 700,000 tv homes subscribing to premium services. But it is also a market difficult to assess in term of future trends. Some ten satellites located in no less than seven different orbital slots are used by broadcasters to distribute programming over Scandinavia. And with the arrival in 1997 of the 32-transponder Sirius II satellite (not mentioned in Lehman Brothers report), 5° East looks set to become the hot spot.

Pay-tv is developing very rapidly in Spain where the terrestrial Canal Plus España service already counts over one million subscribers. As for Italy, the big question-mark is whether the 950,000 subscribers to Telepiu services will all buy a DTH antenna when the pay-tv

Pay-TV Subscribers (000s)

December	CAGR	1994	1996	1998	2000	2002	2004
GERMANY	19.0%	900	2,240	3,216	4,022	4,664	5,135
UNITED KINGDOM	9.0%	3,960	5,033	6,474	7,949	8,961	9,376
FRANCE	3.2%	4,100	4,481	4,849	5,157	5,404	5,602
ITALY	17.7%	650	856	1,320	2,088	2,854	3,326
SPAIN	13.3%	970	1,302	1,925	2,541	3,016	3,389
NETHERLANDS	20.6%	200	441	677	903	1,114	1,306
BELGIUM	9.6%	350	462	573	680	780	873
SWEDEN	5.3%	450	514	577	639	697	752
PORTUGAL	32.0%	26	67	141	257	364	418
AUSTRIA	27.4%	35	112	189	263	332	396
SWITZERLAND	15.4%	95	157	220	282	342	399
DENMARK	16.0%	100	172	244	314	380	442
FINLAND	23.0%	50	123	197	267	335	397
NORWAY	12.8%	100	149	198	246	292	334
IRELAND	10.3%	50	67	85	102	118	133
TOTAL	10.4%	12,036	16,175	20,886	25,710	29,654	32,278
Annual growth			15.4%	13.0%	10.0%	6.5%	3.8%

Source: Lehman Brothers

bouquet is satellite-delivered.

The striking feature of the Lehman Brothers forecasts for pay-tv in Western Europe is not only that they are unbelievably high, but that the growth rate to attain them, and for virtually every country, is a line that seems to have been drawn with a ruler. We have always warned readers against straight line forecasts, especially when the line is steep!

There is a rule of thumb – and Lehman Brothers may have reverted to this highly sophisticated tool – that says the saturation point for any pay-tv service is about 20%. But this is based on very peculiar circumstances, surrounding a small number of successful pay-tv services, that may not apply to newcomers. Canal Plus was "offered" by the French government a ready-to-use national terrestrial transmission network for its service, which developed with little competition. Penetration settled at about 20%. In the UK, BSkyB's premium channels (who may never get close to the 20% bar), benefited from the deep pockets of News Corp to subsidize distribution of satellite receivers, and made judicious use of its national newspapers to promote the business. In the U.S., HBO never managed to move beyond 15-17% market penetration, while M-Net's 30% penetration of its market is a reflection of the poor quality up to now of the South African broadcaster SABC. This is, naturally, not to belittle the evident energy, skills and entrepreneurial drive of all these successful operators. They belong

to a small club from which it is inappropriate to generalize.

By using the past to predict the future – a perilous exercise when it comes to electronic media anyway – this approach makes no allowance for the emergence of new actors and their overall impact.

The reason why we are considerably less optimistic about pay-tv penetration is that true content diversity, the "attractive" programming which Lehman Brothers believe will increase premium channel penetration, may actually not come from the existing broadcasters. It is coming from the packaged multimedia (CD-ROM, CD-i) industry servicing a rapidly increasing PC base, from tapping into the Web, and sooner or later from the switched telecom network operators and wealth of content providers using these networks. It may also come from future digital terrestrial broadcaster ready to take risks in new content access and format.

Besides a passing reference to some of the above, there is no serious attempt in Lehman Brothers' report to assess the impact of these new delivery methods on the pay-tv business, which it takes to be primarily a satellite and cable business.

Maybe we should take Lehman Brothers' figures as a reflection of targets which the firm wants the see the market attain. Or, more perversely, as still another exercise by an investment banker to drum up business among would-be pay-tv operators. 

I've got a book I want to send to Nicholas Negroponte, Alvin Toffler, George Gilder and all the other gurus of the coming digital Eden. Hell, I might even spring for a copy for Newt Gingrich. The book, *When Old Technologies Were New: Thinking About Electric Communication in the Late Nineteenth Century* by Carolyn Marvin, should serve as a warning to prognosticators everywhere, a hint of how future generations will look upon their happy brand of futurism and laugh.

For all of the digerati, *When Old Technologies Were New* will be a frightening read. Prof. Marvin went back and looked at what the expert press and its commentators had to say about electricity, the telegraph and the telephone – society's first great communications innovations – during the period all three technologies were coming into common use. This was a time, Marvin reminds us, when the term electrician had real cachet. An electrician wasn't the guy who fixed your fuse box; no, he was the guy who understood, worked with and profited from these incredible new technologies. He was the nineteenth century's hacker.

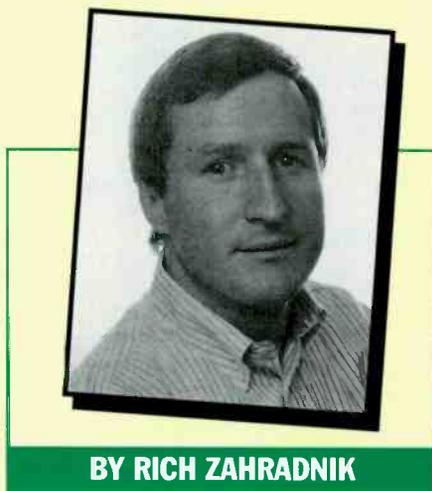
Like today's hackers, electricians built up an incredible mystique around themselves. The electrician lorded his expertise, his special knowledge over others.

"(M)uch of the literature of electrical mission was occupied with sorting and labeling insiders and outsiders in electrical culture," Marvin writes. "The proper naming of persons, gadgets, and concepts in their electrical contexts and relations was among the most important performative indicators of technological literacy..."

This must sound pretty familiar to anyone who's logged onto an Internet newsgroup, been hectored about e-mail etiquette or read anything in *Wired* magazine.

A culture of exclusivity isn't the only thing the electricians and the digerati have in common. Both groups forecast profound improvements in human society would come from their technologies. The magazine *Scientific American*, writing in 1880 of the telephone, predicted "nothing less than a new organization of

Forecasts From The Past



BY RICH ZAHRADNIK

society – a state of things in which every individual, however secluded, will have at call every other individual in the community, to the saving of no end of social and business complications, of needless goings to and fro, of disappointments, delays, and a countless host of those great and little evils and annoyances which go so far... to make life laborious and unsatisfactory."

Maybe it sounds quaint to quote such predictions when they're tied to the telephone, recalling as they do the late Victorians' abiding faith in their inventors and their engineers. But today's gurus are making the same kinds of promises, in fact grander ones, for digital networks. Sure, the telephone changed our lives in a million ways. But it most certainly did not bring a life free of disappointments, delays, annoyances, even "the needless goings to and fro."

The press of the last century got closest to the truth, in an accidental sort of way, when it criticized the promises being made for technology by its sponsors. Edward J. Hall, the new vice president of the new American Telephone & Telegraph Co., in 1890 told an audience, "More wonderful still is a scheme which we now have on foot, which looks to providing music on tap at certain times every day, especially at meal times. The scheme is to have a fine band perform the choicest music, gather up the sound waves, and distribute them to any number of subscribers. Thus a family, club or hotel may be regaled with the choicest airs from their favorite operas while enjoying the evening meal..."

Electrical World was horrified: "For with the success of the first telephone musicale association, there will spring into being rival organizations, the very names of which would make incipient deafness bliss. Imagine the awful devastation that could be wrought by 'The Organ Grinders' Telephonic Mutual,' with drop-in-a-nickel slot attachment. Fancy the horrors of having one's disposition wrecked by a 'popular programme,' headed by a memorial to the late McGinty."

I don't know who the late McGinty was, and I haven't heard much organ grinding lately, but I get the idea. The telephone, once capable of delivering entertainment, would not be used to bring culture, but to transmit forms of mass entertainment the editors at *Electrical World* disclaimed.

Ironically, the telephone did not turn into a delivery vehicle for entertainment (Bell Atlantic and co. may change all that). Not so ironically, every other communications innovation that did – radio, tv, cable, satellite – became a medium of mass, pop, low-brow, call-it-what-you-will, entertainment, not high culture.

In fifty years, when we look back at the digital revolution, we will hear more of McGinty than miracles. [E]

**Scientific American predicted
"a state of things in which every
individual will have at call every other
individual in the community..."**



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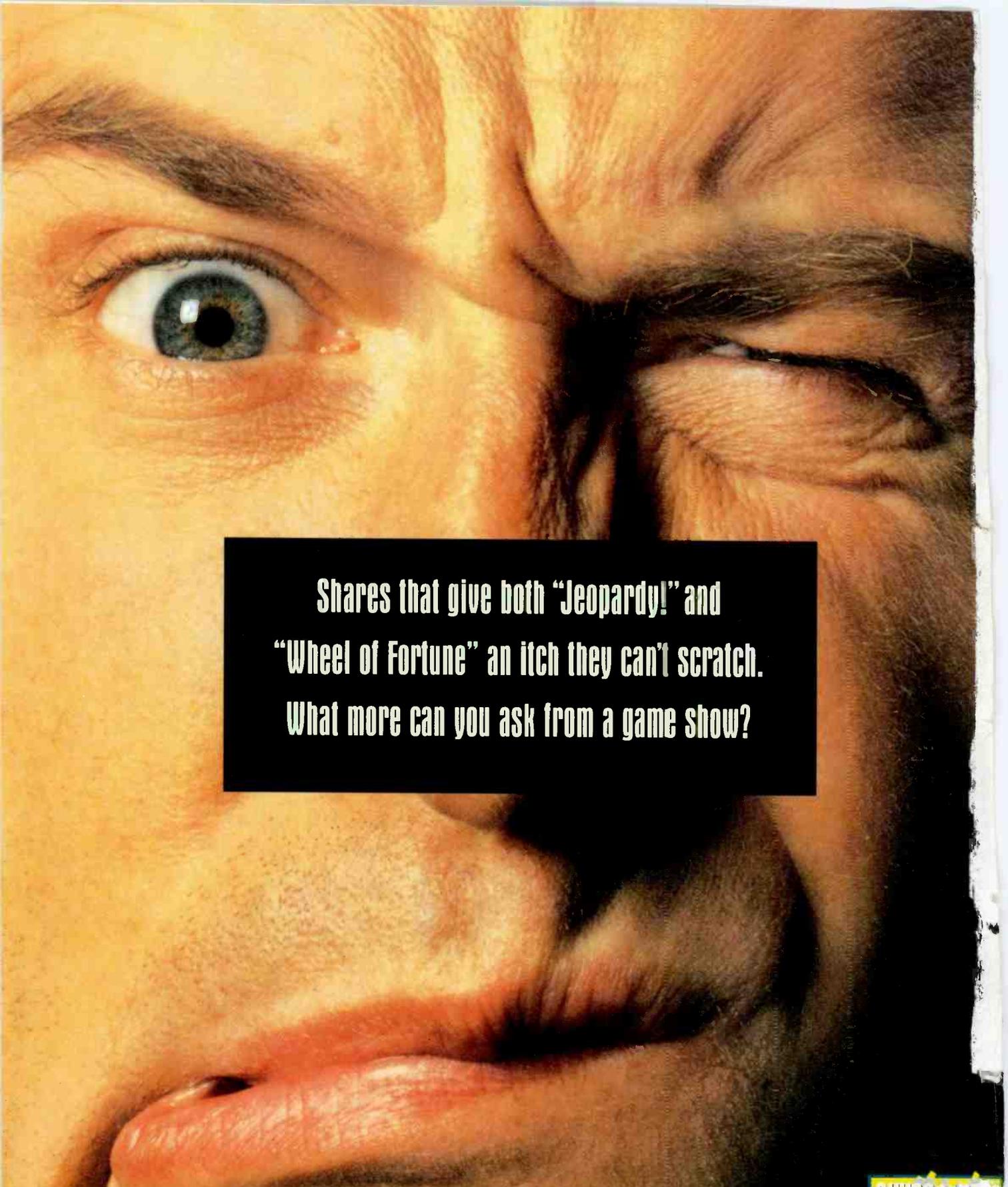
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