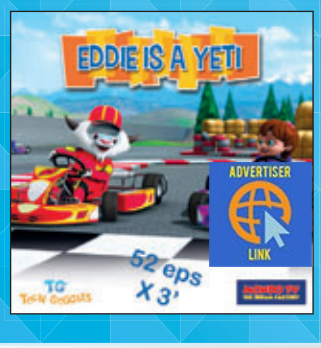
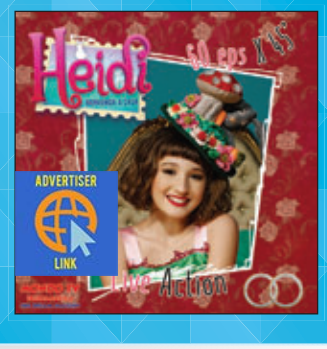
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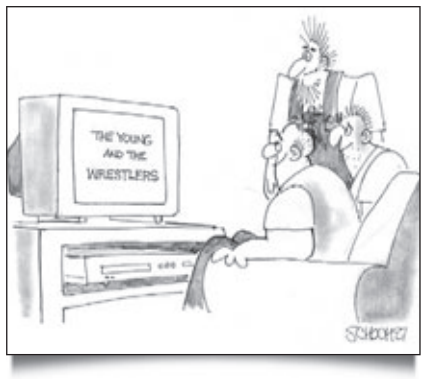
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Anticipating New Trends: U.S. TV Will Be More Diversified

In a highly competitive U.S. television marketplace, what does it take to be the best? At the recent Television Critics Press Tour, each of the U.S. network presidents talked about working on their Achilles heels, i.e. the areas most in need of improvement.

"This is a time for rebuilding at FOX and for networks in general," confessed Dana Walden, chairman and CEO of FOX Television Group. "Broadcast shows have not been the flavor of the month over the past few years, and for good reason. There were shiny new services that wowed you, and cable programmers who won your attention with fantastic shows that would never have survived on broadcast. Five years ago, they were



doing much less programming than the networks, nurturing just a few series … but the playing field has leveled. There's been an explosion of content, and now everyone is in the volume production business."

Walden continued: "We all take a lot of swings, some hits and some misses. But standing here today, I

(Continued on Page 22)

Dr. Herbert G. Kloiber: Int'l TV Distribution Hall of Fame Honoree



Herbert G. Kloiber single-handedly revolutionized German and European television with a vertically integrated company: Tele München Gruppe, involved in production, broadcasting, international program sales, theater ownership and film distribution.

In his 46-year career, Kloiber has been in partnership with virtually every major player in the television industry worldwide.

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Hollywood: How CAA became the agency behemoth it is today Page 6

Singapore-Hong Kong rivalry turns into ATF-Filmart contest Page 8

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My2¢: Internet fostered divisiveness that sprung from traditional media Page 34

Is Trumpism Good For The TV Biz? Opinions Vary



It looks as though the American and most of the international media is up in arms about the upcoming Donald J. Trump presidency. It was certainly not expected, even though it was predicted. But now he's the U.S. president, and the rules of democracy have to be respected. To review the potential impact of "Trumpism" to show business, *VideoAge* surveyed ten experts from nine countries.

For most Americans, Trump is a "trump" (wild) card, but for

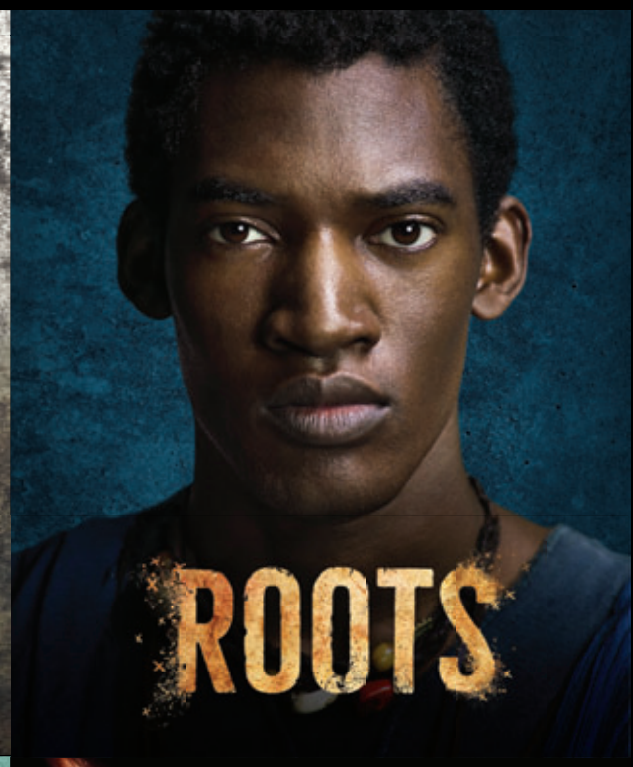
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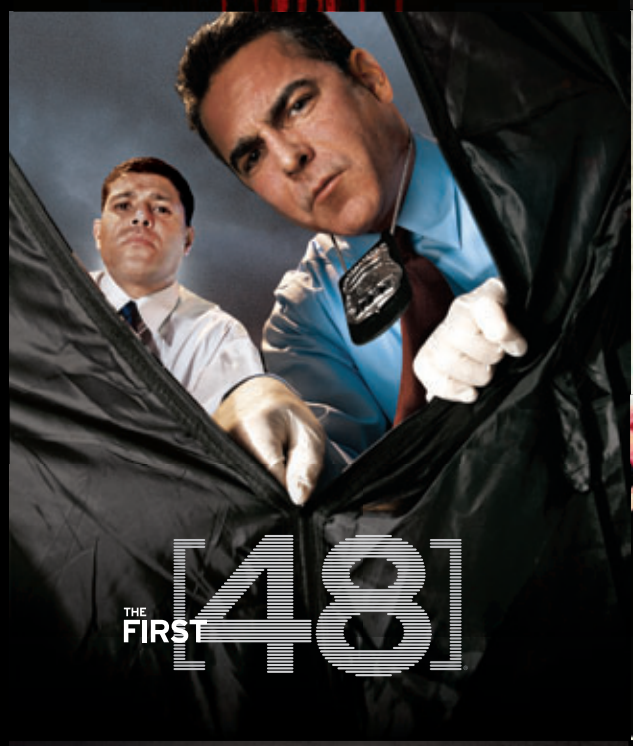


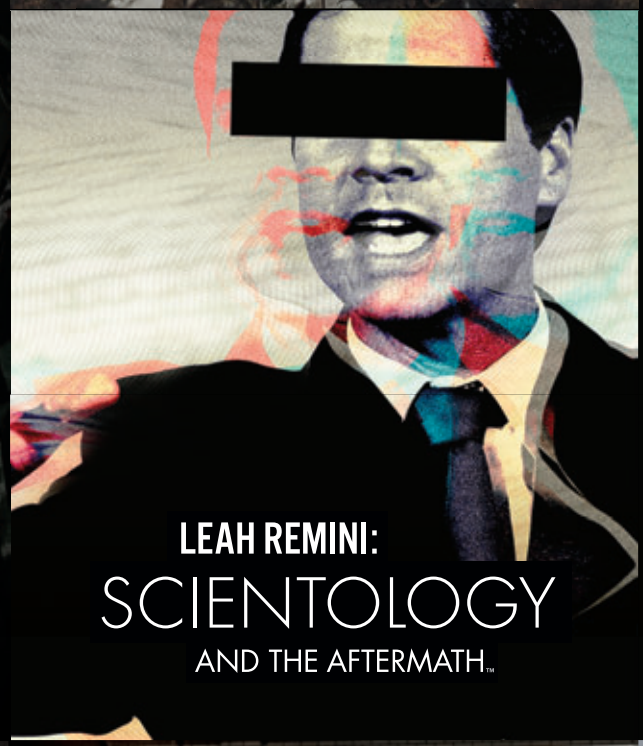
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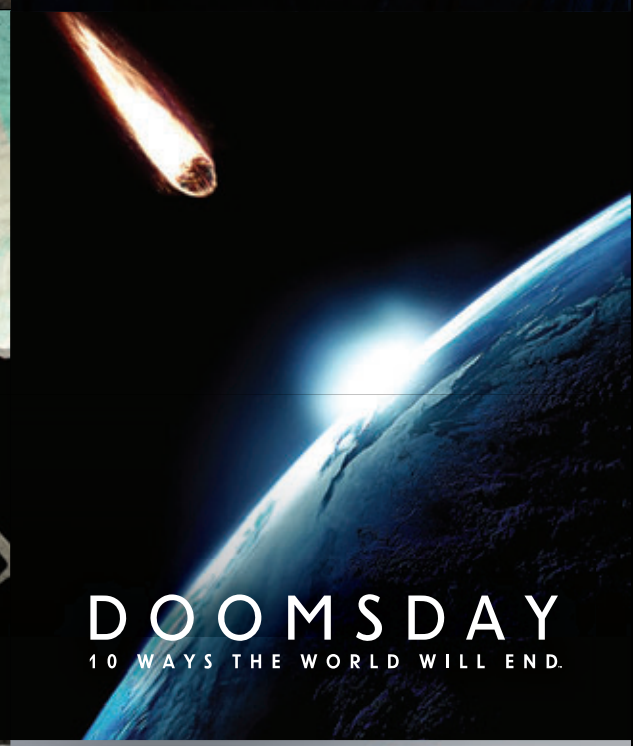


















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My 2¢

Divisiveness and polarization have been around for centuries. Today, the Internet accelerates these, but traditional media is where all of the memes have originated.

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MIP In Cancun Now Resembles The LATAM Portion Of The L.A. Screenings

MIP Cancun was held November 16-18, 2016 at the Grand Fiesta Americana Hotel, a deluxe hotel that replaced the JW Marriott, which became too small for the event (the market registered a 70 percent increase from the previous edition).

According to local legend, the Grand Fiesta was originally a five-star hotel. But when the hotel turned down Guatemalan Nobel Peace Price winner Rigoberta Menchú because of her peasant attire, they lost one star.



However, the Grand Fiesta won many stars with the 560 participants from 387 companies (between buyers and sellers) in 46 countries who attended the third edition of MIP Cancun, on the northeast coast of Mexico's Yucatán. Participants who couldn't find accommodation at the Grand Fiesta were relocated across the street to the Krystal Grand Punta.



The event had four components: Pre-scheduled meetings (nine sessions from 9:45 am to 5:30 pm on day one, 13 sessions on day two and five on day three), a total of 24 conferences, four screenings and five summits.

For the pre-scheduled meetings, 141 tables were set up by 135 distribution companies (some had multiple tables). These covered the costs of the whole market, since Latin buyers from TV stations were invited expenses-paid (buyers acquiring for distribution were not comped). Each table cost exhibitors U.S.$5,000 and included a three-day hotel accommodation. Pre-scheduled meetings lasted 25 minutes each and were clocked with the sound of a bell, similar to the one on the stock exchange floor. In total, 3,700 meetings were held.

Market organizers were sticklers in assuring that meetings ran smoothly and were quick at calling out buyers who were late on the PA system.

Exhibitors in attendance included companies such as A+E, CBS, Fox Networks, Mediaset, Record and Sonar, in addition to a large Mexican presence, as well as all Turkish program distributors. ITV Inter Medya hosted the most lavish of the event's three parties.

Two trivial notes: With buyers committed to meetings with sellers, and distributors busy at their tables, observers were wondering who actually attended the 29 scheduled conferences, which were held during meeting hours. And apparently, various hotels and Cancun's Airport did not carry any daily newspapers.

At first glance MIP Cancun resembled a version of the LATAM portion of the L.A. Screenings. The dates for this year's upcoming MIP Cancun were confirmed for November 15-17, 2017.



At ITV's party (from l. to. r.): Liliam Hernandez (Universal Cinergia), Melissa Okan, Gema Lopez (Universal Cinergia), ITV's Beatriz Cea Esteruelas and Can Okan

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VIDEOAGE
January 2017

Powerful *Powerhouse*: How CAA Became the Behemoth It Is Today

By Leah Hochbaum Rosner

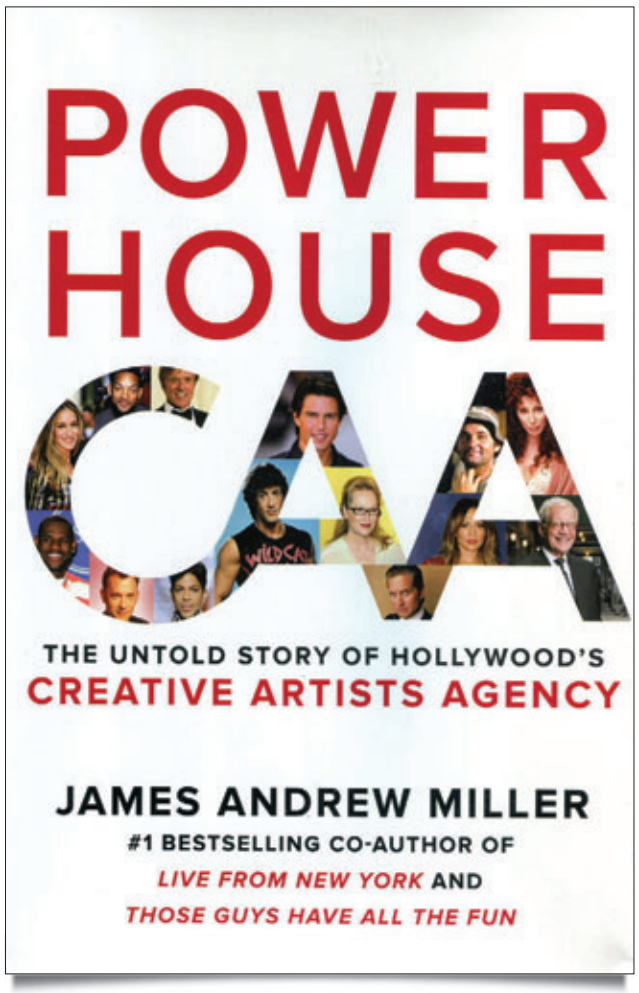
When five young upstarts, deeply unsatisfied with the business-as-usual cronyism of the William Morris talent agency, decided to strike out on their own in 1975, they were looking for more of, well, everything. More responsibilities. More independence. More money. More of a collaborative environment, where information would be shared among even the lowest talent agents on the totem pole. More recognition. More glory. More authority. More power. More control.

What they had at the time, though, was less of, well, everything. They didn't have any money, so those five young agents — including best pals Michael Ovitz and Ron Meyer — worked around card tables in a cheap rental office and had their wives take turns answering the phones. They didn't have any clients, so they pounded the pavement, desperate to sign the next big thing. Every new introduction led to what they hoped would be the next big payday. Every penny they made went back into the business they constantly worried would fold.

"For the first year, it was all Darwinian — survival of the fittest, kill or be killed," Ovitz is quoted as saying. "We had no money, no cash flow. We had a giant behemoth that was organized and well-funded in William Morris that was threatening every minute of the day to put us out of business and trying to marshal its army against us. Our biggest film client was Ernest Borgnine. We had no film bookings. We didn't even pretend to be a film agency. We couldn't get any key film guys on the phone — they didn't have the time of day for us."

Times were lean. But hopes were high. And that optimism paid off. Big time. Because today, the business that they built, Creative Artists Agency (CAA), boasts a whopping 1,800 employees, has offices around the globe — including New York, Los Angeles, Beijing, Munich and Switzerland — and represents some of the best and brightest that Hollywood, and as of 2006, the sports world, have to offer. Movie stars Meryl Streep, Nicole Kidman and Tom Hanks, singers Lady Gaga and Beyoncé, directors Ron Howard and Oliver Stone, and actors Alec Baldwin, Ellen Pompeo and Eva Longoria are just some of the big names that have graced its roster over the years. These days, CAA is a star in its own right, often shining brighter than the talent it so doggedly represents.

In *Powerhouse: The Untold Story of Hollywood's Creative Artists Agency* (Custom House, 2016, 707 pgs., $32.50), author James Andrew Miller tells the fascinating and factual tale of how CAA grew into the, well, powerhouse, that it is today. Like his previous work, the entertaining *Live From New York*, an oral history of the legendary late-night variety show *Saturday Night Live*, Miller vividly chronicles CAA's unlikely rise to power using direct quotations from the folks who made (or saw) it all happen. Miller said he conducted



more than 500 interviews for the book, speaking with everyone from clients to agents to everyone in between.

It's an effective, but somewhat flawed approach to telling a story for a number of reasons. First, Miller becomes overly reliant on other people's storytelling prowess, which is often severely lacking. Second, the book can be repetitive, since he quotes different people saying the same exact thing. Third, there are so many people quoted that it's difficult at times, to remember who's who. While reading, I frequently had to pause to Google a name or flip back through the pages until I located the individual's title.

In addition, Miller struggles with transitions between sections. It's sometimes hard to tell whether a story is over or it's simply gone off on a lengthy tangent. The author sporadically ditches the quotes in favor of a paragraph or two of his own personal exposition, but there should have been more of that. A better or more attentive editor might have been able to make more sense of the hefty amount of material present in this book, and could at least have added subheads to make things easier for readers to follow. An index with names at the end of the book also would have been immensely helpful.

The occasional big mistake can also be profoundly jarring. At one point, Miller describes the hubbub surrounding the making of 1994's *Love Affair*. The movie starred Warren Beatty with Annette Bening, whom Miller refers to as "then his real-life wife." Thinking it odd that I hadn't heard anything about such a high-profile divorce, I looked it up to discover that Bening and Beatty are indeed still legally wed. Was this just an error that an editorial intern should have caught? Or did Miller learn something about the Beatty-Bening marriage during his deep-dive into CAA that he's simply not at liberty to share?

Despite these imperfections, the overall narrative is still pretty captivating. It's enormously impressive that Miller managed to convince hundreds and hundreds of people —including megawatt celebrities and busy businessmen — to speak with him on the record about an organization whose principals work hard to keep it hidden in the shadows. It's a testament to Miller's own clout in the literary world that people were willing to trust him so.

What makes the story of CAA particularly compelling, though, are the bits about the synergetic friendship between Ovitz — a type-A, tough-as-nails businessman willing to do whatever needed to be done to get ahead — and Meyer — a warm, easygoing ex-Marine who everyone wanted to befriend.

"Ron and I played this game that we created very early: good cop, bad cop," said Ovitz. "I was always the tough one and he was always the one that came in and fluffed people up."

That game seems to have worked. Cher is quoted as saying that "Ovitz was just like, *Look at me, I'm the head of it. I'm the head of CAA*… But Ronnie was a real person, a human being. You wouldn't look at him and think he was the head of something."

Ovitz signed the clients and Meyer kept them there. And that's how it worked for years. Until the very end of their tenure at CAA, that is, when their relationship soured like many a work romance does, and Meyer accepted a job (as head of Universal) that Ovitz perceived to be his to lose, while Ovitz purchased a house (record producer Berry Gordy's) that Meyer had mentioned wanting to buy.

Of course, the story of CAA continued after the founders' departures — with the agency moving into the hands of another group of young men who've moved it forward, most notably adding a division that specializes in sports — and continues still today. But none of those men ever make as big an impression in the book as Ovitz or Meyer, who loom as large as the icons they once represented. Ovitz and Meyer are real characters, after all, deserving of their very own movie. If only they could find the right agency to work that all out for them.

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A Much-Improved ATF Market Pleases Sellers; Comparison Is Made With Hong Kong Mart

"It is much better than last year," commented Televisa Internacional's Mario Castro, at the end of Asia TV Forum's first market day on Wednesday, December 7. "We were thinking of canceling after last year's disappointing market," continued Castro, "but so far ATF is proved much improved."

The three-day event, in its 17th annual edition, was held at the traditional Marina Bay Sands in Singapore and was preceded by a full day of seminars on December 6. The Screen Singapore conference portion took place on Friday, the market's last day.

As usual, *VideoAge* focused on gathering market information and in this respect its reporters were surprised to find European buyers, like YLE's Johanna Salmela, who was looking to acquire Asian TV series, "with limited number of episodes to be subtitled in Finnish."

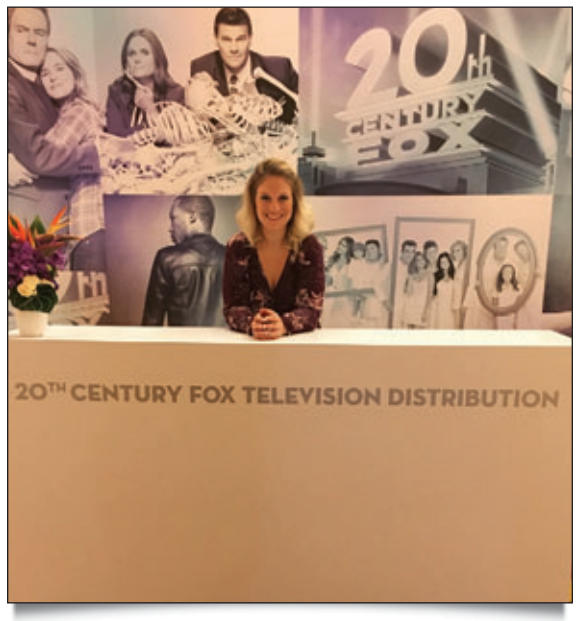
Conversely, the local media focused only on the conference portion. For example, Singaporean daily *The Straits Times*, noted that Screen Singapore is now in its sixth edition and reported that on the opening day the Minister of State Communications, Chee Hong Tat, announced the launch of WritersLab, a scriptwriting masterclass in collaboration with the local Lasalle College For The Arts and sponsored by the city-state Info-communications Media Authority, which also supports the ATF market.

In line with this edition's theme of "Content on Every Screen," the market floor featured a virtual reality stand, promoted as a "showcase of the latest and most innovative technologies." However, *VideoAge* reporters did not see such a display of technologies paraded around.

What could be seen clearly was an increase in participation that, according to official statements, reached 5,000 attendees and a record 738 exhibitors, with all U.S. studios in attendance, which this year, for the first time, included Twentieth Century Fox Television Distribution.



ATV's Emir Duzel and Yasin Emin Elmaci (right)



Effi Eustace of first-time exhibitor 20th Century Fox Television Distribution

A sign of increased participation was evident even before the floor opened: during the pre-market seminars, according to ATF officials, 900 copies of *VideoAge* issues displayed in the magazine bins were taken in just a matter of hours (other copies were distributed throughout the market).

ATF also boasted a large presence of Turkish companies that even included the Istanbul Chamber of Commerce and an increased number of pavilions, which reached 21, even though the Canadian "pavilion" consisted of a small stand with the logos of participating companies displayed on a board. However, some Canadian distributors, such as 9 Story, Blue Ant, Breakthrough and DHX, exhibited with their own booths.

Nevertheless, other pavilions, such as those of Japan, France, China, Taiwan, Korea, Malaysia and Singapore, were expansive.

For Emir Duzel of Turkey's ATV, this was his second time at ATF, but since the company registered late, they missed the deadline to be listed in the directory. However, he found the market very responsive, especially in terms of buyers from Myanmar, Indonesia, The Philippines, Bangladesh and Macau.

According to Andrew Haber of U.S.-based Alfred Haber Distribution, the increased presence of buyers at ATF has reduced the need for side trips to visit clients in their offices either before or after the market. "All my clients are here," he said simply.

On the other hand, Delmar Andrade of Brazil's Record TV "expected a little more. For us, last year's ATF was much more productive," he said.

An exhibitor who wanted to remain anonymous also complained about the inefficient ATF service of matching sellers with buyers.

Before the market started, Jodi Mackie of Canada's Breakthrough Entertainment had already predicted an increased attendance. However, the region remains challenging, "mainly due to the diversity in programming needs from one territory to the next. Budget limitations and the abundance of regionally produced content are also limiting factors to the success in licensing Western content in Asia as a whole," she said. "Throughout South East Asia, we have our strongest partnerships with the pan-territorial broadcasters and digital platforms. However, this past year we've seen significant growth in our regional sales specifically in Taiwan, China, Korea and India."

To Mackie, "Asia has consistently been a global

(Continued on Page 10)



The exhibition floor at the Marina Bay Sands convention center



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(Continued from Page 8)



BlueAnt's Kate Blank, Michael MacMillan

leader in innovation and technology. Content that showcases new technologies, such as virtual reality, drone photography and the 4K evolution is very much in the limelight," she said.

According to Beamish Gakhar of India's Zee TV, audiences in Asia "want to see their own, localized programming. This is why Zee developed the Format Factory, so we can share our creative stories in a new way." Love stories and reality shows have long been favorites in Asian countries, he concluded.

Going back to the ATF market itself, Elena Sunbeam, who organizes the annual World Content Market in Moscow in May and was a first-time ATF participant, commented that the Singapore market is much smaller than Hong Kong's Filmart, which is now entering its 21st year and in her view, the Hong Kong event represents the biggest challenge for ATF since Filmart is now not just for theatrical movies, but includes TV content as well.



The newly added Virtual Reality stand

However, since Filmart is held in mid-March and ATF in early December, the two Asian content markets can easily co-exist. In terms of numbers, Filmart counts 7,300 participants and 800 exhibitors, compared to 738 exhibiting companies at ATF.

According to an ATF official, Filmart's larger presence is due to its proximity to mainland China, which sends hundreds of people. Yet, Can Okan of Turkey's ITV Inter Medya reported that last time he attended Filmart was eight years ago and he's not planning to return since ATF is sufficient to cover Southeast Asia.

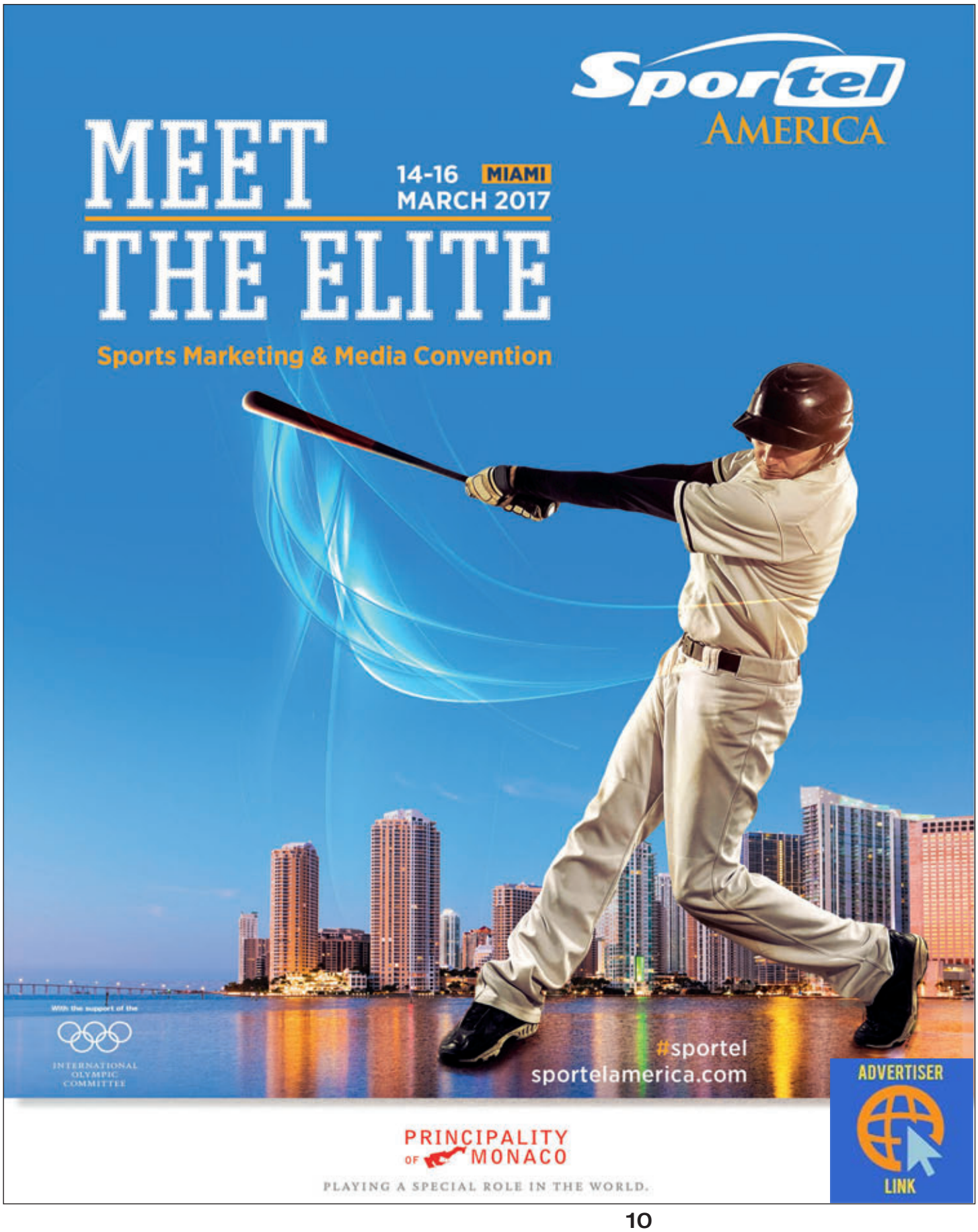
To Pia Bacungan-Laurel of the Philippines' ABS-CBN, ATF is more international and Filmart more Chinese-centric. However, GMA's Roxanne J. Barcelona said, "both markets are important for Asian content distributors."

Dates for ATF 2017 are set for November 29-December 1st, with the conference portion starting November 28, bringing it closer to MIP Cancun (November 15-17). While ATF is organized by Reed Exhibitions, MIP Cancun is a service of Reed's subsidiary, Reed Midem.

On a final note, for some participants, the long flight and jetlag took a toll; fortunately there was plenty of free coffee on the market floor to keep everyone awake.



VideoAge *at ATF 2016*



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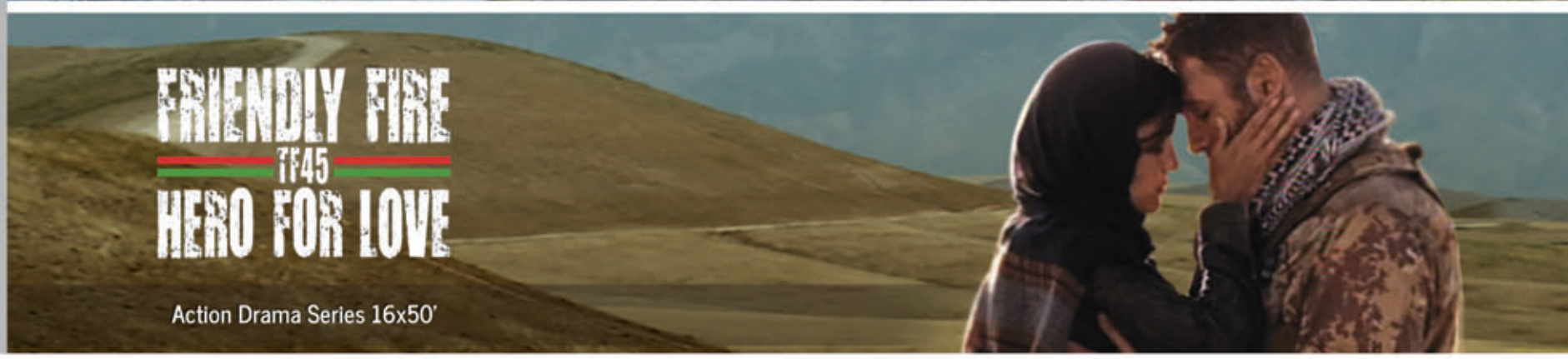
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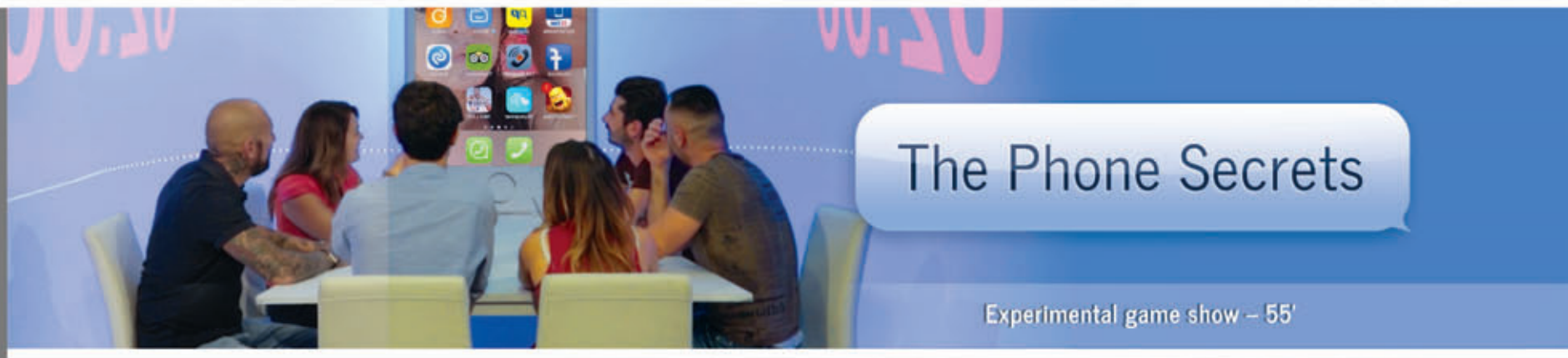
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SECCIÓN EN ESPAÑOL

¿Es el video en vuelo un negocio complicado para proveedores de contenido?

El tamaño potencial del negocio del entretenimiento en vuelos (inflight entertainment IFE, por su nombre y siglas en inglés) es alucinante: cada año más de 37 millones de vuelos comerciales dan la vuelta al mundo. Los vuelos se realizan con 25.000 aviones, de los cuales, sólo la mitad cuenta con el servicio IFE. De un total de tres billones de pasajeros al año a nivel mundial, más de 750 millones quedan expuestos a los servicios de IFE. El costo de los servicios IFE en 2015 para las líneas aéreas fue estimado en U$D2.85 billones de dólares. La expectativa para el 2020 es que esta cifra llegue a U$D5.8 billones de dólares.



Pero con el advenimiento del Wi-Fi en la cabina de vuelo, los cambios se encuentran "en el aire" y por el "uso del aire", lo que podría nublar el actual modelo de negocios de la industria del IFE. Sin

(Continuación a la página 16)

LATAM TV: Restricción para empresas



¿Cómo encarar la inversión en marketing, en dónde enfocarla en este 2017? ¿Los presupuestos para el año nuevo han aumentado o están en baja? ¿En qué difieren respecto a las decididas para 2016? En el caso de las compañías de distribución de contenidos latinoamericanas, los interrogantes seguramente ya han

(Continuación a la página 20)

Edición de MIP-TV y MIP-TV Diaria en Cannes
Abril 1

Edición de L.A. Screenings — Latina en Century City
Mayo 16

Edición de L.A. Screenings — Estudios en Hollywood
Mayo 20

Carlos Barba en la International TV Distribution Hall of Fame
Abril 2016

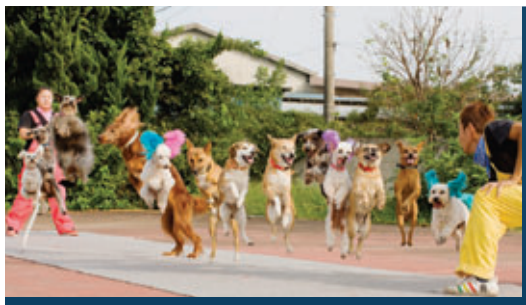
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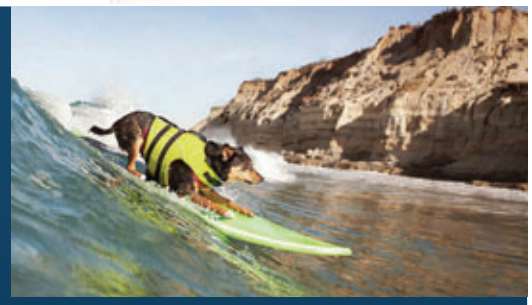


En el pasado, los guionistas presentaban sus ideas y los productores adquirían sus guiones. En estos días, sin embargo, son los productores los que venden guiones que acumularon polvillo en los escritorios de otros productores. Aparentemente, lo que para un productor es material descartable, para otro productor es un tesoro.

En MIPCOM 2016, distribuidores individuales y mayoristas, venden también guiones como adaptaciones y formatos. Son las versiones internacionales con derechos de adaptación a determinados territorios, que pueden incluir

(Continuación a la página 14)





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(Continuación de la página 13)



TJ Barrack de Adaptive Studios

o no, derechos de publicidad. Existe también la renovación de viejos libretos de películas adaptadas para la televisión. Se comenta en particular que Sony Pictures es muy buena en la venta de adaptaciones televisivas.

Para clarificar un poco las confusas definiciones acerca de los scripts, para determinados ejecutivos de Hollywood y Latinoamérica, los guiones ofrecen derechos de "formato" para series ya desarrolladas mientras que las "adaptaciones" se generan de viejas películas. En este caso, sólo se licencia el concepto ya que se requieren nuevos guiones.

Para televisión, el proceso de tomar ideas de viejos programas y hacer nuevos se denomina "Recreación" (Rebooting). Aunque en ciertos territorios los "derechos de formato" son para un show sin libreto (reality) y las adaptaciones (remakes) son series con libretos existentes de programas populares, pero producidos localmente.

Por ejemplo, Hugo Treviño de Televisa Internacional dijo, "todas nuestras telenovelas pueden ser vendidas como formatos. Proveemos todos los guiones y notas de producción en inglés y español, y el video para ser usado como referencia".

De la misma manera, Meca Salado Pizarro, de Telefe Argentina informó: "vendemos guiones de programas de ficción en formatos (telenovelas y otros shows) que ya fueron estrenados y guiones de programas que aún no fueron lanzados. También creamos guiones según nos lo son pedidos".

Marcel Vinay de Comarex, México explicó, "actualmente vendemos una cantidad de (scripts) formatos para series dramáticas y también para programas sin libreto. Los guiones son adaptados con la edición final de cada episodio ya producido. Para el formato de títulos que aún no han sido producidos, vendemos y entregamos los borradores de los libretos. Los libretos son entregados en inglés y el productor local los traduce y adapta a su mercado local".

Patrick Zuchowicki, creador de una feria virtual para scripts denominada "The Remakes Market", dijo que él se sobrepone a las confusas definiciones utilizando simplemente la de "derechos de adaptación para shows con y sin script".

Un egresado de Sony Pictures Television es Brendan Fitzgerald, fundador de Pomodoro Stories con base en Miami, que se especializa en el desarrollo y licenciamiento de scripts y formatos con scripts alrededor del mundo. Asociado a Beta Film de Alemania (su primer empleador), Pomodoro Stories ofrece financiamiento para coproducciones, preventas y distribución mundial.

En Hollywood, uno de los mayores compradores de "viejos" scripts es Adaptive Studios. Según se informó, Adaptive adquirió 50 scripts de diferentes Estudios para convertirlos en films. Por medio de Adaptive Books, su brazo editorial, la compañía también está convirtiendo esos guiones en libros y usan los libros para promover los films.

De todas maneras, aun teniendo el efectivo en la mano, la adquisición de viejos scripts de los Estudios nos es una tarea fácil. En la mayoría de los casos los Estudios simplemente no tienen idea cuáles son los viejos scripts que tienen guardados en sus bóvedas.

TJ Barrack, fundador y socio de Adaptive Studios explicó: "los Estudios de manera notoria compran mucho más de lo que usan y en la medida que el sistema de distribución tradicional se achica, décadas de desarrollo de proyectos se acumulan unos sobre el otro. Hay casos en los que hemos escuchado de un proyecto "huérfano" y lo hemos ido literalmente a buscar revolviendo y desempolvando cajas".

"Acceder a los mismos no es siempre fácil ya que la mayoría de los ejecutivos de los Estudios no te comprenden cuando les dices que quieres ver proyectos que otros han presentado. El proceso de tomar historias que nadie quiere y darles nueva vida no es ni simple ni sexy".

"Los aspectos legales y comerciales son tan desafiantes como lo es el aspecto creativo, pero nuestro objetivo último es sacar esas historias al mundo y darle al Estudio la oportunidad de beneficiarse de nuestros esfuerzos. Nosotros no nos peleamos por scripts que todo el mundo quiere, nosotros buscamos aquellos que fueron enterrados y olvidados".

Por lo general es la tarea de ejecutivos individuales de hacer el seguimiento de los scripts que fueron vendidos a otros productores o que se encuentran en el "infierno del desarrollo", pero cuando éstos (ejecutivos) dejan el puesto, los Estudios pierden el seguimiento de los scripts. Puede que sean los mismos ejecutivos los que, luego de haber licenciado un script, decidan no enviarlo a desarrollo, o tampoco ponerlo para que se le hagan modificaciones. En su lugar, los guardan en sus bóvedas para lo que en la juerga de la industria se llama "schmuck insurance" — usando la palabra en Idish schmuck para tonto — por si posteriormente el script se convierte en un éxito por medio de otra compañía.

Según se informa, MGM es uno de los Estudios de Hollywood con buen nivel de seguimiento de sus viejos scripts. Igualmente, cuando su experto en conservación de films, Roger Mayer (sin relación con el fundador de MGM, Louis B. Mayer) se retiró en 2005 de la empresa, en aquel momento en manos de Ted Turner, ese rol desapareció.

Las agencias de actores también son una buena fuente de scripts, además de los Estudios, los agentes guardan "viejos" libretos y venden aquellos que duermen en sus escritorios. Se dice que una de las agencias de actores más grande



Armoza Formats en el Remakes Market

en la que se pueden encontrar muchos scripts es el departamento literario de The Gersh Agency, que tiene oficinas tanto en Hollywood como en la ciudad de Nueva York.

Naturalmente, vender scripts — ya sea guiones de películas o films ya filmados — en el Movie Script Market de eBay, o de films no producidos que fueron a parar a "La Lista Negra - The Black List", no es nada nuevo. Además los productores que buscan material siempre tienen disponible un pool de scripts disponible. Tal es así, que se estima que cada año más de 100.000 scripts están dando vueltas por Hollywood y de esos, sólo 300 se convierten en films.

La ventaja de adquirir de los Estudios scripts que han juntado polvillo, como lo hace Adaptive Studios, está en aprovechar la selección de material prometedor adquirido por los grandes Estudios, pero nunca convertidos en films por diferentes motivos (cambio de ejecutivos, el infierno del desarrollo o eternas modificaciones).

"La Lista Negra - The Black List" (blcklst.com) de Los Ángeles es uno de los muchos sitios Web donde se pueden encontrar scripts de películas, también en Internet Movie Script Database y en InkTip (inktip.com). Black List que le pertenece a los socios Franklin Leonard y Dino Simone, se ocupa de futuros guiones y pilotos de episodios originales y, según Leonard, "tienen una relación con Adaptive Studios".

En MIPCOM 2016, entre los distribuidores de contenido que también están en el negocio de la venta de scripts, estuvo Avi Armoza, de Armoza Formats Israel, que posee un catálogo de scripts de 25 series producidas tanto en Canadá como en Israel (sus dos principales fuentes de material). Los scripts están en inglés y son vendidos para remakes desde ocho episodios por temporada. El precio de las licencias es del 5% del costo de producción, recibiendo Armoza una comisión. Armoza también se encuentra en el negocio de la venta de formatos, que si no poseen un script, se reciben con una "Biblia".

Tal como fue mencionado anteriormente, el negocio de la compra-venta de scripts no le escapó al creador de DISCOP TV, Patrick Zuchowicki, quien seis años atrás desarrolló el Remakes Market, dedicado por entero a la venta y Marketing de scripts ya existentes. Desde sus orígenes en Los Ángeles, el Remakes Market se ha llevado a cabo por tercer año consecutivo en Shenzen, China.



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embargo, por el momento, el cielo es el límite. En el pasado reciente, en la jerga del negocio, las ventas de contenidos IFE se denominaban "Derechos Accesorios". Previamente se los llamaba "Derechos no teatrales" (que además de los IFE, incluían barcos en altamar, prisiones, hoteles y escuelas), mientras que actualmente son simplemente "otras ventanas".

El sector IFE está segmentado en conectividad (cableada o inalámbrica), contenido y hardware (fijo y portátil). Según Frost & Sullivan, consultora con base en Nueva York, en 2012 el hardware ocupaba el 68% del mercado y la conectividad un 20%. Sin embargo, en 2020, el mercado del hardware decrecerá a un 48% y la conectividad se incrementará hasta un 44%. La porción de contenidos se estima caerá del 12% del 2012 a un 8% en 2020.

De todas maneras, se espera que el volumen total de provisión de contenidos crezca a unos U$D464 millones de dólares en 2020 (de U$D342 millones de dólares el último año). Sin duda, es un gran incremento si se toma en cuenta que en 1982, que el valor de los films vendidos por los Estudios americanos a las líneas aéreas fue por un total de U$D 20 millones de dólares (unos U$D50 millones de dólares a valores de hoy día).

El modelo de los IFE posee una estructura en el que las compañías aéreas nombran a proveedores de contenidos (Content Service Providers-CSPs) — tales como Global Eagle Entertainment (GEE), de Marina del Rey, California. Spafax de Londres, Stellar Entertainment de Pompano Beach en Florida y a Inflight Dublin de Irlanda. Los CSPs compran films y shows de televisión a los dueños de los contenidos, que pueden ser distribuidores de contenidos de vuelo tales como Encore Inflight (Hong Kong), Jaguar Distribution (Studio City, California), Skye Inflight (Montreal), Terry Steiner International (New York City) y Entertainment in Motion (EIM), una subsidiaria de GEE. Además los CSPs le compran también a los Estudios americanos, a productores independientes y agentes de distribución.

Según Jovita Toh, CEO de Encore Inflight, "la única línea aérea que compra directamente a los dueños de los contenidos es Turkish Airlines. Para el resto de los otras 95 líneas aéreas que son nuestros clientes, trabajamos con los CSPs". Para los independientes el procedimiento es el siguiente: las compañías aéreas tienen divisiones que ven todos los materiales y hacen una lista a los CSPs para que obtengan el material. Los CSPs también hacen recomendaciones a las compañías aéreas y aconsejan sobre la selección final. Por este motivo los dueños de los contenidos envían material para que sea visto tanto a las compañías aéreas como a los CSPs. Sin embargo el precio es discutido solamente con los CSPs. El acuerdo comercial entre las líneas aéreas y los CSPs puede ser por un monto mensual o un gasto anual, pero algunos de los CSPs trabajan con presupuestos fijos habiendo acordado en compartir el ahorro que ellos consiguen obtener, como así también presupuestos extras.

De acuerdo a Jim Griffiths, Vicepresidente Ejecutivo de compras y distribución de GEE, "la mayoría de la líneas aéreas están representadas por un CSP. GEE representa cerca de 150 aerolíneas en todo el mundo y casi un 80% de éstas se encuentran fuera de los Estados Unidos". Maura Chacko, Vicepresidente de desarrollo en Spafax coincidió,



Maura Chacko de Spafax

"la mayoría de las líneas aéreas están asociadas a un solo CSP, pero tenemos como clientes aerolíneas que tienen múltiples proveedores".

Actualmente, algunas de estas aerolíneas gastan cerca de U$D20 millones de dólares al año en contenidos de IFE y según Griffiths, "el negocio de los IFE está impulsado por la exhibición de films en cartelera". Por este motivo las compañías que se ocupan del IFE concurren a ferias tales como: Cannes Film Fest, AFM, TIFF en Canadá dedicado especialmente a las compañías aéreas, al evento de Apex e incluso al L.A. Screenings. Generalmente no concurren al NATPE, MIP o al MIPCOM.

Los contenidos de IFE son cautelosamente escrudiñados: las aerolíneas dejan afuera escenas de violencia y terrorismo (para Europa), desastres aéreos y nudismo (para USA y el Medio Oriente), y contenidos relacionados con temas políticos y religiosos. Algunas llegan al extremo de cambiar escenas sangrientas a blanco y negro, censurar diálogos que mencionen productos porcinos y escenas con contenidos homosexuales (para Singapur), e imágenes con el logo de compañías aéreas que son competencia.

De todas maneras, los proveedores de contenidos sólo ofrecen versiones teatrales y los distribuidores son los que editarán el contenido. Si las compañías aéreas requieren edición adicional, los CSPs se ocuparán de ello. Sin embargo, según Griffiths, actualmente son los distribuidores de largometrajes los que editan la mayoría del material para los diferentes territorios.

El modelo de negocio de los IFE ha cambiado desde la época en la que las aerolíneas pagaban de U$D0.08 a U$D0.10 por asiento. Hoy en día, las grandes líneas aéreas pueden llegar a pagar hasta U$D90.000 dólares por la licencia de exhibición para pasar una película por un período hasta tres meses. Usualmente los Estudios no les dan a las aerolíneas una "ventana" con las fechas de los estrenos ya que la venta de entradas en los cines es utilizado como medida para los ingresos por distribución. En el caso de GEE, Griffiths dijo que ellos licencian contenido cuya duración es por lo menos de un año y venden los contenidos a las aerolíneas con un precio fijo o cobran en base a cada vuelo.

La ventana que dispone la línea aérea es de 40 a 90 días una vez estrenado el film y no hay exclusividad. Pero, explicó Chacko de Spafax, "¡las aerolíneas siempre quieren tener la exclusividad! Es obvio que muchas compañías tendrán en un mes determinado los mismos títulos recién estrenados, pero habiendo tanto contenido disponible para programar, se puede armar un programa a medida para cada compañía y sus pasajeros".

Títulos de cine de autor pueden ser proyectados en los aviones previamente a su estreno en los cines. Los acuerdos de compromiso para pasar los films y ser incluidos en las revistas de vuelo, se hacen previamente. Pero esto puede que cambie pronto debido a que, para reducir el peso, las aerolíneas están dejando de lado las versiones impresas de sus revistas en favor de las versiones digitales.

Según Toh, de Encore, "la orden de compra de los films se realiza de 8 a 12 semanas previas a la proyección para poder darle a las revistas de vuelo el tiempo suficiente de incluirlas". Mientras que Chacko comenta, "nosotros trabajamos con nuestros clientes para tratar de cerrar la programación aproximadamente con dos meses de antelación. Esto permite a todas las partes involucradas, como ser: el equipo de la revista de vuelo, el equipo de Marketing y todos los otros relacionados, de tener el tiempo suficiente para promover el contenido".

En lo relativo a la ventana que tiene la aerolínea, Toh declaró que esta puede variar desde un mes hasta todo un año. Sin embargo, su empresa adquiere films por períodos de licencia de dos a tres años, independientemente del tiempo que las tomen las empresas de aviación.

"Cada uno de nuestros clientes decide cuánto tiempo desea tener la película a bordo", dijo Chacko, "en la mayoría de los casos, los estrenos estarán a bordo de tres a seis meses. Sin embargo, los títulos populares son mantenidos por más tiempo o ingresados nuevamente a la programación para una nueva performance".

Además, el contenido debe ser doblado a diferentes idiomas y Toh explicó, "para las películas principales en idioma inglés, cuantos más idiomas tienes, más populares serán en las aerolíneas. Para films que no son en idioma inglés, generalmente el subtitulado en inglés es suficiente".

El doblaje es un tema complejo, dado que para los idiomas principales son los proveedores de contenidos los que deben ocuparse del doblado. Para idiomas específicos (por ejemplo: árabe, coreano, turco) son los CSPs los que asumen la responsabilidad. Chacko explicó, "cada uno de nuestros clientes tiene un set específico de requerimientos, no sólo basado en los de su propio país, sino también en el de los grandes mercados a los que dan servicio. Ciertos clientes llevan films hasta en 8 lenguas. Con la vital importancia que esto significa para sus ingresos, los Estudios proveen más idiomas y los hacen mucho más rápido cada año".

El próximo gran paso en la evolución del IFE es el Wi-Fi, que permite a los pasajeros traer a bordo sus propios dispositivos (BYODs), ahorrando costos (equipos más livianos y menos costos de mantenimiento) y posiblemente incrementando los ingresos de las aerolíneas (shopping y juegos). Si bien los dispositivos en las pantallas de los espaldares de los asientos permiten realizar compras en la cabina de comida y bebidas, los sistemas tradicionales de IFE pueden llegar a costar hasta U$D6 millones por avión y el equipamiento que puede llegar a pesar hasta 300

(Continuación a la página 18)

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(Continuación de la página 16)

Kg. y agregar un costo de U$D50.000 dólares por avión en costos de combustible (y debe agregarse el consumo de la energía eléctrica).

El sitio Web de viajes Tnooz calculó que cada línea aérea puede llegar a ahorrar hasta U$D24 millones de dólares para un avión de 200 asientos cuando un sistema tradicional de IFE es reemplazado por el sistema BYOD.

Algunos analistas de las compañías aéreas dicen ahora que el sistema instalado de IFE es cosa del pasado y que sólo los modelos de conectividad quedarán activos, incluyendo sets de realidad virtual que ofrecerán películas en 2-D y 3-D. Pero la conectividad en los vuelos es compartida, lo que lo hace que la experiencia de video de alta calidad se vea restringida por la limitación del ancho de banda que actualmente existe en los vuelos.

En todo caso, la tecnología viene a salvar la situación con sistemas de Wi-Fi más rápidos, tales como Exede, que utiliza la tecnología satelital de ViaSat y ofrece una velocidad ocho veces más rápida que otros sistemas (llegando hasta 12Mbps) y hasta cuatro veces la cantidad de pasajeros que pueden estar conectados simultáneamente (prácticamente todos en un vuelo), esto comparado con modelos más antiguos que utilizan el sistema tierra-aire: una red de banda ancha con celdas en torres terrestres.

Aprovechando la tecnología de ViaSat, el pasado otoño, Virgin America acordó con Netflix de proveer un servicio Wi-Fi complementario de stream para que los pasajeros puedan acceder al contenido de Netflix subscriptos a su servicio de VoD.

De manera similar, por medio de ViaSat, JetBlue ofrece a las compañías aéreas un servicio libre de Wi-Fi de alta velocidad por el costo de una "Coca-Cola y un paquete de maníes".

Sin embargo Griffiths, de GEE, no ve a Netflix como una amenaza para el IFE, dado que la ventana de exhibición para las aerolíneas es la primera ventana una vez una pasado el estreno, mientras que la ventana de SVoD de Netflix es la tercera en la fila luego del TVoD y la TV paga.

La mejora en la conectividad cambia la naturaleza del IFE, reconoce Chacko de Spafax, "pero nos presenta un nuevo desafío para encontrar la manera particular, única, de atraer al pasajero. Para el IFE esto abre un mundo de oportunidades que nos permite ayudar a nuestros clientes a captar a los pasajeros en tiempo real –'in-journey, in-play' - es el nombre de este concepto".

Las empresas que compiten con Exede son: GEE, Raw 44, On Air, Live TV y el sistema IntelliCabin de BAE. Por otro lado Gogo Vision y WISE de GEE usan sistemas inalámbricos de IFE que operan totalmente independientes de la conectividad y pueden pasar contenido por stream en un vuelo sin estar conectados a un sitio Web.

Recientemente, GEE también introdujo ENTICE (Entretenimiento, Información y E-Commerce), una plataforma inalámbrica para IFE, con una oferta de más de 10.000 horas de contenido.

Euroconsult de Nueva York, reportó que el total de ingresos estimados por las aerolíneas por el consumo de conectividad de los pasajeros crecerá de U$D700 millones de dólares en 2015 a U$D5.4 billones de dólares en 2025. Para fines de 2015, 72 compañías aéreas ya habrían instalado o planeado instalar sistemas de conectividad a bordo de las aeronaves. Se estima que la cantidad de aviones con conectividad crecerá de 5.300 a 23.000 en el período 2015-2025, llegando a un total del 62% de la flota mundial.

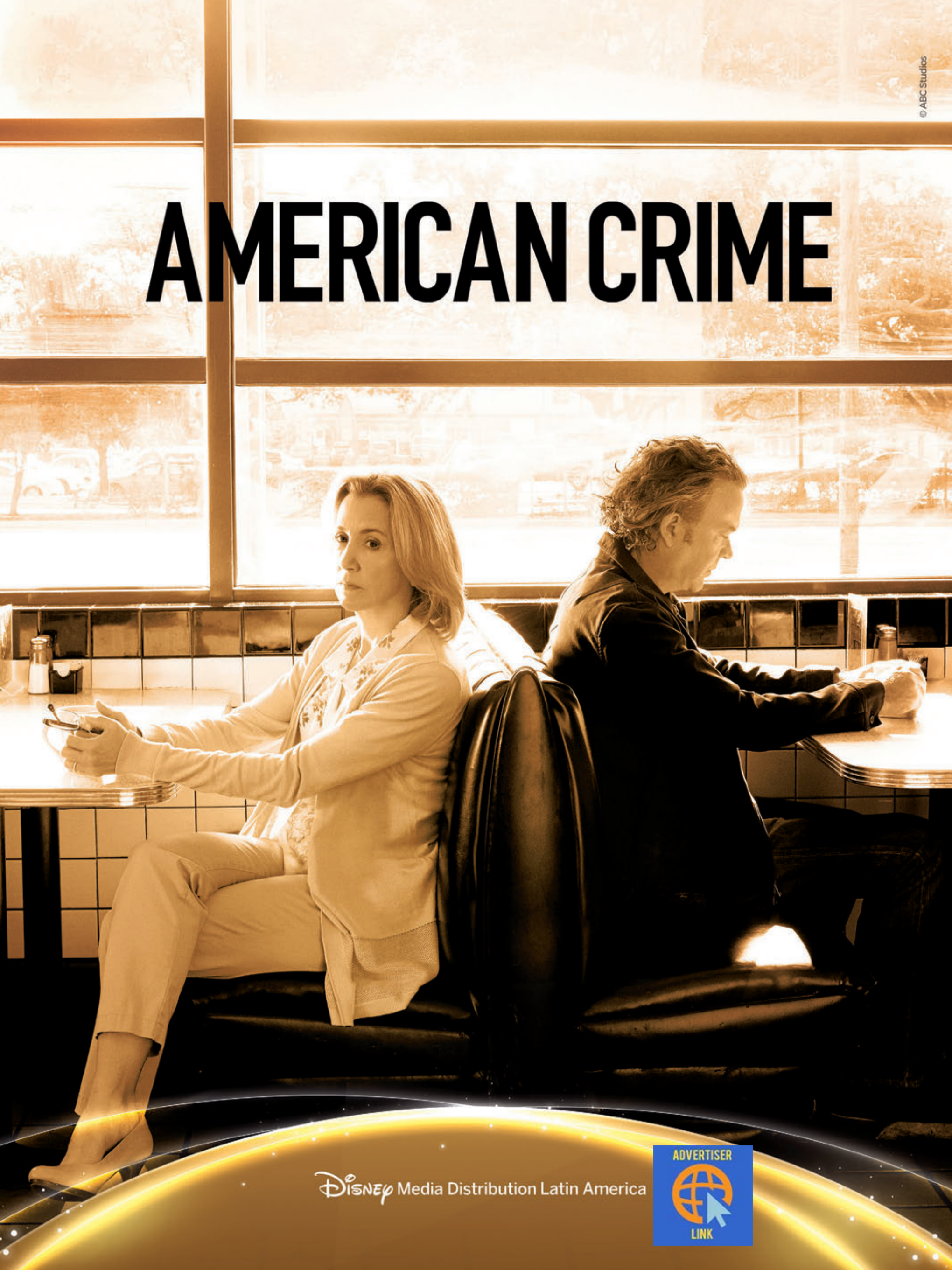
De seguro, el servicio a bordo de BYOD cambiará el sistema actual de IFE a un modelo IFC (In-Flight Connectivity). Según Frost & Sullivan, el área de contenidos (incluyendo a los CSPs) se consolidará entre "dos o tres actores que son los que manejarán el mercado". Se debe agregar, que la integración vertical continuará con proveedores de hardware volviéndose integradores de contenido. Pero Chacko de Spafax sostiene, "en nuestros 30 años de historia, hemos visto tanto la consolidación como la fragmentación de nuestro negocio. Y a pesar de ello, hemos sido capaces de mantenernos como empresa líder de CSP".

(*Por Dom Serafini*)



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(Continuación de la página 13)

encontrado respuestas, como también el destino de gran parte del budget anual.

En América Latina, siempre, hay empresas muy dependientes de las economías nacionales, generalmente inestables. Ejemplos en la proyección 2017 son los mercados de televisión clave de la región como Brasil, México, Argentina y Colombia, por el clima político y económico que allí impera, y que difiere del que se vivía en los inicios de 2016.

La situación brasileña condicionará notoriamente a los principales grupos locales, varios de ellos activos en las grandes ferias internacionales. Desde el impeachment a la ex primera mandataria, Dilma Rousseff, que la empujó fuera de la presidencia, más los numerosos escándalos de corrupción denunciados, han dejado a la población bajo una gran incertidumbre política, social y económica. Ese clima toca, obviamente, a las televisoras abiertas, llevándolas a mover sus proyecciones, rebajarlas y hasta ajustarlas de forma extrema para evitar balances ruinosos. A diferencia de otros países de la zona, las empresas de Brasil acostumbran y prefieren prevenir males antes que exponerse a riesgos en este tipo de situación. Por ello, no será sorpresa que los brazos de distribución internacional de contenidos de las televisoras líderes del país tengan menor disponibilidad de fondos para sus incursiones y presentaciones internacionales durante todo 2017.

México no le va en saga al gigante lusohablante. La administración del presidente Enrique Peña Nieto ha tenido un incremento del endeudamiento, poco crecimiento y una depreciación del peso, lo que complica el panorama general de la economía nacional. El buen nivel de consumo y de crédito no ha logrado cambiar la percepción de preocupación. El reciente triunfo de Donald Trump en Estados Unidos ha aumentado la incertidumbre para 2017, teniendo en cuenta la importancia fundamental que tiene para sus exportaciones especialmente y para buena parte de su actividad económica (remesas, por ejemplo) el poderoso vecino del Norte. Los líderes del broadcasting mexicano están en pleno proceso de cambios para afrontar tanto la coyuntura económica como la llegada de nuevos competidores en la TV abierta local, lo que supone un especial esfuerzo redoblado de inversión en la propia tierra y un menor flujo para sus operaciones de ventas de contenidos al mundo.

Argentina es un caso raro. En los últimos años, la comunidad artística ha tenido un romance largo con los dos gobiernos que le precedieron al actual presidente, elegido hace un año. Durante esos tres periodos en los que gobernó un matrimonio, Néstor Kirchner (2003-2007) y luego su esposa, Cristina Fernández (2007-2011 y 2011-2015), la actividad audiovisual ha sido una elegida por los gobernantes, que pusieron recursos para dinamizar la producción nacional y las exportaciones de contenidos locales. La crítica situación económica heredada por el sucesor, Mauricio Macri, presidente desde diciembre de 2015, no ha resultado un final para ese apoyo: todo lo contrario. Las posibilidades de una importante presencia argentina de distribuidores y productores en los grandes eventos del sector parece estar descontada, al igual que las filiales de distribución de los broadcasters líderes. Se supone que también los presupuestos de marketing acompañarán esa extensión de la apuesta argentina.

La economía colombiana, aunque no ha estado en los niveles esperados, con un crecimiento trimestral decreciente hacia el final del año, no evitaría una repetición de la presencia de los principales players de la TV abierta del país en las ferias, comenzando en NATPE.

Chile, otra nación que ha entrado con fuerza en la distribución transfronteriza de sus creaciones, vive una primavera económica, lo que genera expectativas en cuanto a asistencia a las expo internacionales, al igual que un aumento del marketing para promoción.

Está claro que las coyunturas políticas y económicas siempre resienten o incrementan los budgets de marketing de los brazos de distribución de las grandes cadenas de TV abierta nacionales de América Latina, como también limita la participación en los mercados mundiales de las productoras atadas a la coproducción con esas televisoras locales. En cambio, no condiciona de forma importante al resto de distribuidores independientes asentados en esos territorios.

La región tiene a grandes actores de las lides de distribución — Televisa, Globo, TV Azteca, Record TV, Telefilms, Caracol Television International, Telefe, Ledafilms, Smilehood, entre otros — representando al territorio en la primera gran cita del año, NATPE Miami.

(Por Omar Méndez, CEO & Chief Editor, *The Daily Television*)





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feel like we have a slate of new shows that stand up to the best of anything being produced on any platform. And we're in the midst of a turnaround at FOX … While we think our slate is strong and we have some momentum, it's no longer enough to have great content. We spend a lot of time focused on the future of the broadcast business, and we're moving in the right direction. We've made a lot of progress making our programming available to our viewers wherever and whenever they want it."

Walden said that peak TV (i.e., the notion that TV has reached the peak amount of original shows possible, and that collapse is imminent) is a challenge. "A lot of the best creators are trying to staff shows with experienced writers who can deliver on an episodic order that works for broadcast — and that's no longer 22 or 24. You still need to be able to platform enough episodes to feel like a broadcast show. I find that to be the challenge, but we are producing 50 shows at the studio, and I feel pretty good about the creative talent behind virtually every one of those shows."

CBS is trying to increase diversity in their television shows, both in front of the camera and behind the scenes. While the network has many African-American and Latino supporting actors, CBS does not have people of color as the leads of their fall television series. But Glenn Geller, president of CBS Entertainment, noted that they are "very mindful" about the importance of diversity and inclusion.

"We need to do better and we know it … we [were] definitely less diverse [last fall] than [the previous] year … in terms of overall diversity in our new shows, our ensemble diversity, we [were] actually more diverse [last] year than [the previous] year. And that's our commitment to diversity. It is ongoing."

Geller said that behind the camera the network is getting better in this area. "Our writers are more diverse than [in 2015], as for our directors, and we're not finished booking every slot, but we're on track to be more diverse [in 2016] than [the previous] year. We continue to put additional resources and financial support into our CBS Diversity Institute, and that covers many different parts of diversity for us. That's our showcase, and it's kind of the gold standard in the industry. Many people cast from it. It includes our writers program. It includes our directors program. And even the Director's Guild of America has kind of held them up as premiere programs that really make effective and real change."

The network also has CBS On Tour, where they go out to colleges and talk to graduates about opportunities in television.



NBC Entertainment's Robert Greenblatt



CBS Entertainment's Glenn Geller

"We provide them access and information, and that leads to diverse individuals having a shot at getting a job," said Geller. "One day they could be in a key decision-making role, where diversity can foster more diversity. And that is our commitment. It's much more of a 360-degree approach."

Geller is also working on diversifying the sexuality representation on CBS. "Things are definitely shifting. In terms of LGBT representation, we have more LGBT characters on this coming year than ever before. We have in our newer series, especially on *Bull*, and *The Great Indoors*. In the second year of *Code Black*, Malaya on the show is a lesbian. Vanessa Ferlito, who we cast in *NCIS: New Orleans*, her character is a lesbian and they're doing a storyline a little later in the fall where the audience will understand that and see that. And Laverne Cox in *Doubt* is a historic role. She's the first transgender actress ever to play a transgender series regular character. That is huge. And I think as we continue to put new shows on the air, those trends will continue, and I'm very proud of that."

ABC Entertainment's new president, Channing Dungey, is also dealing with the issue of diversity, with long-running reality series *The Bachelor*. "I would very much like to see some changes there. And one of the biggest that we need to do is increase the pool of diverse candidates in the beginning, because part of what ends up happening as we go along is there just aren't as many candidates to ultimately end up in the role of the next bachelor or bachelorette. So that is something we really want to put some effort and energy toward."

Dungey is also getting used to her new role. "Coming in in the middle of pilot season was challenging, especially getting up to speed with all of the comedies and understanding exactly what we were doing in that space," she said.

Still she's up for the challenge. "People talk a lot about peak TV, and it's true, there are more scripted shows than ever before, but in a way, that to me is the exciting part of about what we do to be a part of telling those stories … finding wonderful voices that have things that they want to share and helping be a part of bringing that to life. And we always pride ourselves at ABC on being the home of passionate storytellers. We want to give our writers the freedom to tell the stories in the best possible way and to give them our fullest support. When we find something that we really love, that speaks to us, we do everything that we can to make it happen."



FOX's Dana Walden

NBC's lineup has solidified so much that the network only launched two new dramas and one new comedy last fall. "NBC has defied a lot of the doom and gloom, downward trends we've been hearing about network television for the past few years," said Robert Greenblatt, chairman, NBC Entertainment. "In fact, we're thriving in an era of unprecedented change, and our slate of entertainment programs has actually generated ratings gains for the last three years in a row."

Still, Greenblatt and Jennifer Salke, president of NBC Entertainment, acknowledged the network has had a few misses, and as a result, have learned a lot about programming comedy.

"The thing that we learn about comedy every single season is it's really a hard genre to launch, no matter how good the shows are," Greenblatt said. "So we're trying to be very careful and very strategic about it."

Salke added: "We came in at a time where some of those loved comedies were sort of finding their natural ending and moving out. And the goal was to raise ratings at a time where people were starting to watch less comedy in a linear way. So it was sort of a perfect storm of things, of us trying to get more people, [with] less people watching that way. And the lessons learned from it and I know we all did learn them, was that you should still go for the sophisticated, smart, great creators' point of view and get behind that. You might not please everyone; comedy is polarizing by nature. Do something really excellent that works for a large group of people, but don't try to sort of end up in the middle." (By Susan L. Hornik)



ABC Entertainment's Channing Dungey

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VIDEOAGE
January 2017

(Continued from Cover)

Herbert G. Kloiber Mixed Arts, TV Biz From An Early Age For a Vertically Integrated Group

By Dom Serafini

It can be said that vertical integration in the U.S. television industry began in 1993 with the repeal of the so-called Fin-Syn rule, which was established in 1970.

In fact, 1970 was the year in which Herbert Georg Kloiber (generally known as Dr. Kloiber) entered the German entertainment sector and, with hindsight, it could be said the seed of vertical integration was already ingrained in his mind.

Kloiber made his first appearance in the international television distribution business at MIP-TV 1970, when he was 23 years old. In effect, he's the youngest of the world's international TV distribution pioneers, yet still one of the oldest MIP-TV participants.

German pioneer TV producer and distributor Reiner Moritz recounts how the proprietor of Tele München Gruppe (TMG), one of Germany's largest media holdings, ended up owning a vertically integrated TV production, distribution and broadcasting business: "Late in the 1960s at the Palace Hotel in Montreux during the Rose d´Or Festival, I made a bet with David Attenborough that he would step down as controller of BBC-2 when I had my PhD and I would quit the Kirch Group, which I did in 1969 as he had simultaneously done at the BBC. Since a successor for me was needed at Kirch Group, Herbert von Karajan, with whom Leo Kirch jointly owned the Swiss production company Cosmotel, mentioned to both me and Leo a young aspiring Herbert Kloiber, his godson."

In 1970, the same year that Kloiber received his law degree from the University of Vienna — his birthplace — he started at Beta-Taurus, the combined company that Leo Kirch had founded in 1959 as Beta Film, and Taurus Film in 1963. Four years later Kloiber was named managing director of Unitel, a producer and distributor of classical music founded by Kirch in 1959.

But let's return to Moritz's recollections: "Herbert comes from an old well-to-do Viennese family. His father, an industrialist, held two PhDs and died in 1987, while working on his third, which dealt with French and Catalan influence on the language of the inhabitants of Mallorca. His mother, who recently died at the age of 99, hosted a salon where famous people met. She disliked the idea of seeing her eldest son go into the 'film business', which she associated with the red light district. She therefore bore a grudge against me for a long time."

In 1976 Kloiber left Beta and founded Clasart, a company based in Munich. "He fell out with Kirch for artistic reasons," explained Moritz.

That was the also the year Kloiber became interested in building a vertically integrated company, and he credits a "meeting with a public TV executive."

Clasart was the springboard for his vertical integration ambitions. Even though Andrew Carnegie basically invented vertical integration in 1892 with his steel company in the U.S., for the entertainment business the strategy was first applied in Europe in 1909. That was the year when Pathé Frères controlled both film production and distribution in France and Belgium. Then, 67 years later, Kloiber brought the concept to Germany's entertainment sector.



Kloiber with Arthur Rubinstein in 1975

In 1977, he acquired Tele München with filmmaker Fritz Buttenstedt who, reported Kloiber, remained a partner "only for a few early years." Tele München was then a seven-year-old production company founded by producer Walter Ulbrich. Some 38 years later, TMG's revenues for 2015 (as described in a release last July) were 236 million euro with a 24 percent profit margin: Revenues from theatrical distribution (Concorde Filmverleih) were lower than 2014, but Concorde Home Entertainment achieved good results. In broadcasting Tele 5 and RTL 2 maintained their market share and boosted their income; Clasart Classic generated another growth in revenue with Met im Kino, live broadcasts from the New York Metropolitan Opera, with 188 participating theaters in Germany and Austria. Not taken into account in EBITDA were the investments in the television broadcasters RTL 2 and ATV, as well as the holding in Odeon Film AG.

"I liked Herbert and decided to take him around the world to introduce him properly to all our clients," Moritz continued. "At his first MIP-TV our task was to sell the recent Herbert von Karajan's Cosmotel productions, all shot on 35mm film. As no cassettes or DVDs existed at the time we had to hire a cinema on Rue d´Antibes hoping that clients weren't too drunk from the night before to turn up. Karajan would recompense those who did show for a screening with an outing on his sailing boat," he said.

Tele München entered the TV broadcasting arena in 1986 as the fourth largest shareholder with 6.8 percent of SAT1, Germany's first private TV broadcaster. Those shares were sold the following year. Also in 1986, Kloiber purchased KMP, which owned and operated TV broadcaster Musicbox. "This was the only time I risked the whole company," he said, looking back on it. "There was a point with Musicbox where we only had cash for a few months of operation."

Then, from the mid-1980s up until 2004, TMG went through more than 20 transactions, buying and selling into 15 companies.

In 1987 he sold 50 percent of Musicbox to Italy's Silvio Berlusconi who, a year later, turned it into Tele5. Subsequently, Tele5 became sport channel DSF when Leo Kirch acquired it in 1992. However,

(Continued on Page 26)



Herbert Kloiber (center) handing over his first check for the rights to Joseph Losey's The Go-Between*, with EMI's Richard Milnes (right), EMI's record producer Peter Andry (far right), EMI's vice president Michael Bromhead (left) at EMI Films London headquarters in 1971*

Congrats Herbert!

Thanks for shaping the television industry
and for inspiring all of us.

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(Continued from Page 24)



Kloiber with Silvio Berlusconi in 1986



With Leo Kirch and Wolf-Dieter Ring (then-president of Bavaria media regulatory agency BLM) in 2005

TMG kept the Tele5 name and used it to relaunch the channel in 2002.

In 1987 Capital City/ABC acquired a 50 percent stake in TMG, shares that Kloiber re-acquired nine years later, when Disney bought CAP Cities. About that period, Kloiber acknowledged it by saying, "ABC was the best partnership I've ever had. We didn't argue for five minutes. I learned more in the nine years with Capital than I did in the 20 years in business beforehand."

In 1992, together with CLT, Bertelsmann and Bauer, TMG founded the broadcast network RTL 2. Today, TMG together with Disney (through a joint venture) holds 31.5 percent of RTL 2.

In 1995, Kloiber and Heinz Bauer established TV network tm3 in Munich. A year later, Kloiber bought out Bauer, but subsequently, in 1998 he sold the first 66 percent of tm3 to Rupert Murdoch, and two years later the remaining shares for U.S.$170 million. Then Murdoch sold tm3 to the Kirch Group. Kloiber explained that tm3 was renamed 9 live and went on to become a quiz/call-in format station and that it later belonged to ProSiebenSat1.

In 1997, TMG acquired TV2 Hungary, which was exchanged for shares in Scandinavian broadcaster SBS in 1999, shares which then sold in 2005 when Pro7 acquired SBS.

In 1999, he sold 45 percent of TMG to the Munich-based EM.TV for the equivalent of U.S.$450 million in cash. When in 2001 the EM.TV stock went from 120 euro to penny stock status, Kloiber was able to buy back the stake for just $109 million.

Just between the years 1999 and 2004, Kloiber went through nine major transactions, including acquiring in 1999 a 40 percent stake in ATV, Austria's first private broadcaster, and in 2000 shares in Lionsgate, which were sold three years later.

In addition to the aforementioned companies, TMG holds a 50 percent stake in On Demand Deutschland, a VoD joint venture with the London-based Vubiquity.

In 2008, TMG set up its own world sales operation: TM International, which buys international rights, handing German-speaking territories over to parent company TMG and selling off the rest.

Kloiber can hold any negotiations in perfect English, French or Italian, in addition to his native German. For example, with this journalist he prefers conversing in Italian as does his 40-year-old son Herbert Leopold, who's married to an Italian from Venice and who in 2012 was appointed TMG's managing director.

As the senior Kloiber explained, his Italian comes from childhood summer visits to Venice starting in 1950, and French from the Swiss boarding school he attended near Geneva from 1957 to 1965.

Many MIP-TV and MIPCOM participants are aware that during the Cannes markets, even though he has a stand in the Palais, Kloiber prefers conducting business meetings on a boat. This journalist embarrassingly discovered that the big vessel was Kloiber's own when, invited on the boat, he asked him to remove his shoes, something that's not likely to be requested if the boat is rented. Thus, this reporter learned that Kloiber is also an avid sailor and that he moors his boat in Monte Carlo from where he sails it to Cannes. But, how did he learn how to sail, having grown up in a country that is landlocked? "On an Austrian lake," explained Kloiber, then he expanded: "Austria has many Olympic sailing medals."

Among the few questions that he preferred not to answer for this feature was the strategy behind the multiple buying and selling operations from 1987 to 2004, and what his main early challenges were, and what they are now. However, he provided an amusing reply when asked if he likes to delegate, "Not really…. they say," he said.

Commented a German TV executive, who also speaks Italian: "I had little dealings with Kloiber, but I know that he can be a charming person, but when he gets mad, you better watch out!" Kloiber is also very sticky with his name, recalled pioneer U.S. TV distributor Sandy Frank: "When I called him 'Herb,' be sternly told me that his name was Herbert."

Thus, it is only appropriate that Kloiber has the last word. When asked what legacy he hopes to leave to the German entertainment industry, he concluded: "A feel for top quality."



Ursula and Herbert Kloiber congratulating Vladimir Horowitz in New York City in 1978

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Europeans and Italians in particular, Trump is a *déjá vu* experience. Italy had a precursor in Silvio Berlusconi, who had been Prime Minister and founding president of a political party for 10 years on-and-off, starting in 1994. Indeed, Italians have a name for it: Trumpusconi.

At NATPE 2012, *VideoAge* Daily raised the possibility of a Berlusconi-type of presidency in the U.S. and now we see the similarities: Both Berlusconi and Trump made billions in real estate and construction. Both became popular through television. Both of their respective spouses come from show business. Both have five children each and they rely on their eldest daughters: Berlusconi on Marina and Trump on Ivanka. Both have conflicts of interests, are populist candidates, with no previous political experience, and lack social filters. Both are despised by some world leaders: Berlusconi by French and German leaders, among others; Trump by China and Mexico, among others. However, both have a great relationship with Russia's Vladimir Putin.

Conjectures are now flying all over the U.S. and international media that Trump's own Republican Party will eventually impeach him because he's, in effect, an outsider. Others report on his various conflicts of interests and hope that, like Berlusconi, the court of law will cut his presidency short. Indeed, as an American TV executive who works for a Canadian company said, "Like me, many Americans are not very concerned about Trump's authoritarian inclinations because they trust our system of constitutional checks and balances to constrain him."

If Berlusconi's 10-year experience in government is to serve as a guide, Trump would well last the full two mandates, or eight years.

Being in the entertainment industry, *VideoAge*'s question is whether or not a Trump presidency will be good for show business and, in particular, television.

On the campaign trail Trump threatened legal actions against the unfriendly media. As President, Trump will have the power to change the direction of the entertainment business by appointing a new commissioner of the FCC, the regulatory agency, and by nominating controversial pick Jeff Sessions as the new head of the Department of Justice (for anti-trust actions).

VideoAge conducted a survey among journalists and TV executives around the world seeking a prediction on Trump's effect on the U.S. and international entertainment business. Some U.S. media reported that Trump would be good for the book publishing industry, news in general, and the production of documentaries. The Europeans are already salivating over the prospect that Trump will lift the embargo on Russia, and therefore mutual business will be restored.





Silvio Berlusconi with Vladimir Putin at the Krasnaya Polyvana ski resort in 2012

> ***As President, Trump will have the power to change the direction of the entertainment business by appointing a new commissioner of the FCC, the U.S. regulatory agency.***

Some economists are also predicting that the U.S. dollar will strengthen against other currencies, which will be good for American imports and, indirectly, for international sales of U.S. content, since the improved economy will mitigate the higher exchange rates.

However, Russia is a touchy subject for many Americans (especially Republicans), since that country's president, Vladimir Putin, is accused of having helped Trump win the presidency. But more than a "Putin White House," some observers are calling it a "[Debbie] Wasserman Schultz White House," since, as the head of the Democratic National Committee, she is reported to have favored presidential candidate Hillary Clinton over her opponent Bernie Sanders, who is said to have had a better chance of winning against Trump.

For this survey on Trump's influence over the TV biz, *VideoAge* received comments from Argentina, the U.K., Canada, Brazil, Hungary, Germany, the U.S., Hong Kong and Italy.

"In Latin America, due to continuous attacks against the Latino community (and especially against Mexico, the largest Spanish content factory in the world), the climate of uncertainty is greater. And that leads [me] to think that companies will be more conservative in their financial plans and more fearful, which is not good for the markets.

My first sentiment is that 'Trumpismo' is not good for the businesses of television."

Omar Méndez,
CEO & chief editor, *The Daily Television*, Argentina

"All my life I have heard people complaining that all politicians do is lie, and wish for one that just said what he really meant. Well folks, now you've got one. How interesting the new year and its new president will be for the content

(Continued on Page 30)



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business isn't easy to predict. Apart from calling us [journalists] all crooked and corrupt, Trump hasn't said much about his media policy, but he used to be in the TV business so it can't be all bad, right?"

Bob Jenkins,
freelance journalist, U.K.

"The impact of 'Trumpism' is hard to predict. 'America First' as a revitalized doctrine is limited in today's world with international TV groups having ventures and shares almost everywhere across the globe. It's hard to imagine that he will allow these revenues to be endangered. The impact will also depend on the investment and economic stimulus Trump has promised. If it creates stable growth across all the economy, the TV industry will benefit. So, it really remains to be seen. However, Trump will stay in the news for at least the next four years. That's one impact for sure."

Dieter Brockmeyer,
freelance journalist, Germany

"His clown-like, reality-show personality will certainly raise viewership and readership for no other reason than the consumer will be keen to see what outlandish move he will make next. [However] Trump's unorthodox behavior has proved unnerving to the business of television. The Sinclair broadcast group of stations have already benefited during the campaign by currying favor with their coverage. How has this benefitted the business and ensure the checks and balances required? Rules at the FCC will more than likely be revisited and again it's possible that Trump loyalists will benefit. Trump has already been a threat to independent media and that's not good for the health of the business."

Farrell E. Meisel,
international media consultant, U.S.

"Trumpism is a double-edged sword for the TV business. On the one hand, it has got the potential to surge viewership since Trump's communication strategy heavily relies on being bombastic. However, TV execs will have a bigger responsibility than ever to provide the public with bipartisan information and to dig deep on every policy issue once the Trump machinery is up and running in the White House. And they will face a nearly impossible task since the president-elect got where he is now by making a lot of people believe that the mainstream media is lying."

Levente Horompoli,
Budapest Business Journal's senior correspondent and editor, Hungary

"For sure it will be good for media in general and not just television. And not only in the U.S., but also worldwide. If Trump maintains even half of what he has promised in his campaign, there will be a lot of 'juicy' material for the media. For one, because of Trump, *The New York Times* has already increased the number of its subscribers by 200,000."

Niccolò d'Aquino,
Italian correspondent, *AmericaOggi*, Italy

A similar comment is provided by another Italian journalist, which indicates how Italians were made immune by "Berlusconism:"

"Let's start by analyzing three elements: First the endorsement that voters and Wall Street





gave to Trump. Second, that TV prospers if it has an audience, and third the generational gap that separates linear TV from digital TV. Those elements indicate to me that even though Trumpism is characterized by a black-and-white vision (no shades) often not politically correct, it will not be an obstacle to business, including show business. However, television is a global business and if Trumpism pushes TV production toward more narrow U.S. issues, then business could suffer."

Enzo Chiarullo,
staff reporter, *Millecanali*, Italy

That sentiment is also shared by a Canadian TV executive, although in a more pessimistic tone:

"Some of the best productions on TV (and digital platforms) involve partnerships, pre-buys and production spread across many countries. A forced 'nationalization' of the U.S.-based business could increase costs for every stakeholder, reduce the volume and quality of storytelling and hurt producers, broadcasters, audiences and advertisers worldwide."

Jay Switzer,
Hollywood Suite, Canada

"The key issue will be the way Trump is going to deal with the large mergers and acquisitions in the industry. We might go back to the 1930s, when production and distribution were under the same umbrellas, and this is not healthy for the industry as far as pluralism and diversity are concerned."

André Mermelstein,
editorial director, *Converge Comunicações*, Brazil

"I do not think Trumpism is good for TV. I have always been calling for more socially responsible media content for TV and I find Trump's actions and mindset that of 'Trash TV!' He would say or do anything (and setting a bad example) just to get media coverage. The majority of Asians share my views on Trump and also fear the uncertainty he will bring to America and the world."

Robert Chua,
TV producer, Hong Kong

From the above comments, the conclusion so far is inconclusive, and the world, possibly in its entirety, will surely be stuck in front of a TV screen to monitor, review and analyze Trumpusconism and its evolution into Trumpism.

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Suggestions for Delta From an Irascible Frequent Flyer

Airlines (and Delta in particular) can do small things to reduce the misery of economy class air travel such as:

1) Allow passengers who need extra help to board last, after able travelers are seated and those who need assistance can calmly stroll to their seats, without being trampled over by rushing passengers who are following behind. The same goes for de-planing: those who need extra help should disembark last, in order not to cause delays to other passengers who have to rush out to make connections.

2) Demand that those who are in charge of menus and who prepare meals served on board actually travel with the airlines served. Perhaps, after that experience, the food quality onboard will improve.

3) Set the onboard temperature to a comfortable 18-degree celsius (rather than those sub-freezing temperatures we endure now).

4) Finally, reduce the wait for a taxi at Delta's JFK terminal to a bearable 30 minutes (instead of today's 60 minutes).

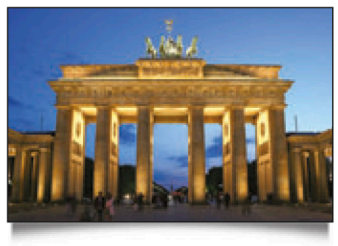
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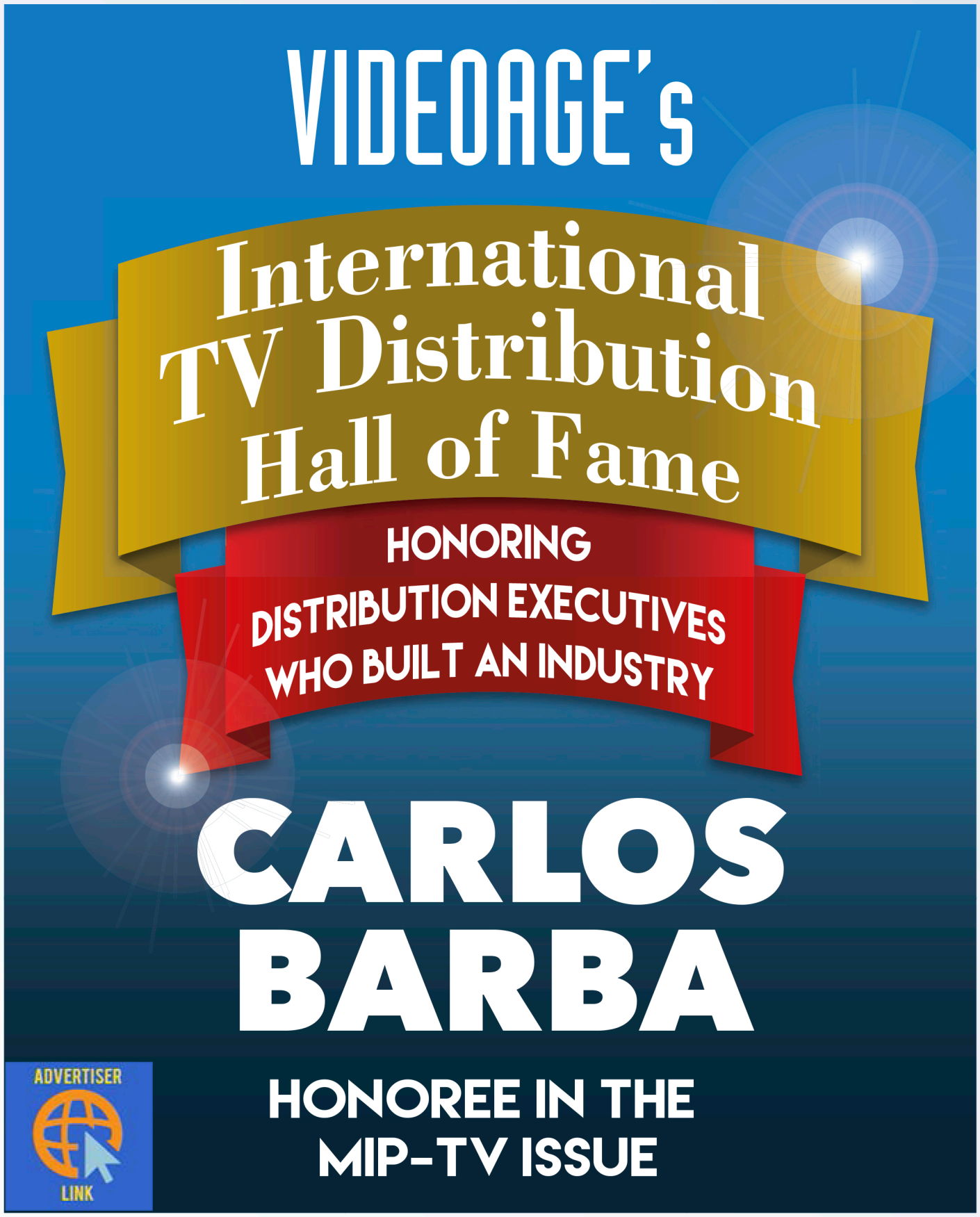
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My 2¢



Divisiveness and polarization have been around for centuries and they are the root causes of wars. Today, the Internet accelerates these, but traditional media is where all of the memes have originated.

Why is America (along with many other nations) so divided and polarized? Aren't the main issues the same? We are used to seeing the Middle East and Africa divided into many factions, but the problem exists also in the U.S., France, Italy, Venezuela, Colombia, the U.K. (with Brexit) and many other countries.

In those countries the laundry list of problems is clear and valid for the overwhelming majority of people: Jobs, schools, health care, mass transit and safety.

And yet, the same messages are somehow distorted during the carriage from the source to the citizens.

With the fall of Communism and the end of the divisive ideology between Communism and capitalism, the hope was that citizens the world over would focus on practical matters. Instead, people replaced economic ideologies with social and religious issues, sidetracking pragmatism.

Worst of all, practical matters got wrapped into social and religious issues (abortion rights, same-sex marriage), so that health care became a religious issue and safety became an immigration issue.

The rifts are also within various political parties. In the U.S., the Republicans are split into two or even three factions and the Democrats are divided into two camps.

The question now is: Why is the U.S. polarized at levels not seen possibly since the Civil War?

In my view, this neo-phenomenon has been initiated by the proliferation of TV and radio talk shows, in addition to an increasing number of news shows, and has been exacerbated by the widespread diffusion of Internet and social media.

When the number of TV channels was limited, information was more or less uniformly balanced toward the center. In those days, extremists had to join under-the-radar associations in order to hear and amplify the messages they wanted to hear.

When "cheap" talk TV became popular and widely emulated, TV stations needed new angles to be competitive and started seeking extreme topics and subjects. The language also changed, with curses sprinkling typical conversations and dialogues conducted by using vocabulary typical of a fifth grader.

Similarly, news TV channels had to differentiate themselves by serving niche audiences: FOX News for the right and MSNBC for the left.



These extreme news channels focused on the malfeasances of the opposite side and, at times, even embellished the reports with borderline fabrications. But they preached to the choir, which did not bother to listen to both sides. This, in my view, was the beginning of polarization, which led to divisiveness.

But, no matter how liberal or conservative TV channels are, they are "mainstream media" compared to the extremism of many Web outlets. Since these websites cost little to produce and do not require accountability, they can spring up daily, created by individuals who seek to be connected with those people that find traditional TV channels' extremism too tame. These sites have become hotbeds for radical groups and are even used for recruiting terrorists, as the Daesh and white supremacists' phenomena have demonstrated.

When "cheap" talk TV became popular and widely emulated, TV stations needed new angles to be competitive.

Not being accountable, these websites became popular also by actually fabricating false reports and amplifying untruths, mixing them all with some official statistics and cherry-picked news to have the semblance of validity.

Enter WikiLeaks, reportedly as an instrument of the Russian government to punish world politicians or to interfere with other nations' elections. By making politicians' malfeasances public, WikiLeaks also created distrust for the political establishment, rendering nations susceptible to populist propaganda and to an increased use of direct democracy. Referendums were originally the expression of citizens' rebellion against a legislative system corrupted by corporate interests, but now the use of referendums is prone to manipulations, which create further divisiveness and problems.

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