

THE *Holly* REPORTER®

Number 7

0 (U.K.)

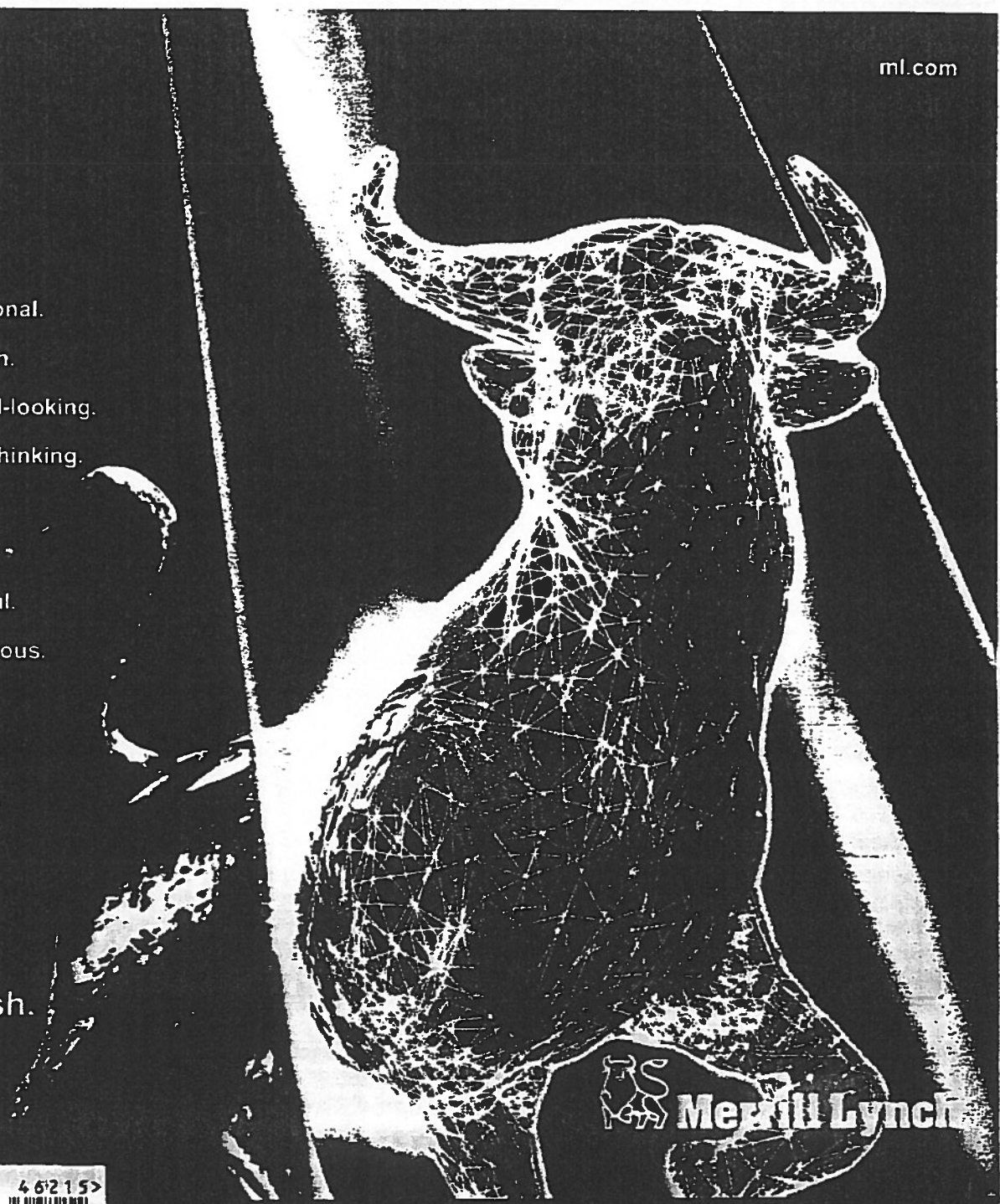
Publication

INTERNATIONAL 50 SPECIAL ISSUE

- Be quick.
- Be smart.
- Be ready.
- Be prudent.
- Be daring.
- Be conventional.
- Be contrarian.
- Be backward-looking.
- Be forward-thinking.
- Be global.
- Be local.
- Be thoughtful.
- Be spontaneous.
- Be wired.
- Be unwired.
- Be strategic.
- Be tactical.
- Be wise.

- Be bullish.

ml.com



 Merrill Lynch



Merrill Lynch's Global Media Group...

© 2000 Merrill Lynch & Co., Inc. Issued and approved by Merrill Lynch International, which is regulated by The Securities and Futures Authority Limited for the conduct of investment business in the UK.

International POWER

50

The Hollywood Reporter presents a rundown of the 50 biggest power players in global entertainment and media.

BY KEVIN CASSIDY



Compiling a list of the biggest movers and shakers in international entertainment and media is no small task. Despite many names on this list sitting atop empires that have existed for decades, many of the world's power players have a tenuous hold on a rapidly changing international marketplace. Dealing with these changes will be critical to their continued success. The International Power 50 is an attempt to capture that ever-evolving world as it exists right now, and this list also provides insights into how it might look in the future.

The most powerful figures on the global scene are really representatives of vast, interconnected corporate family trees with branches that often extend to other companies in other hemispheres.

Nowhere is this more evident than Rupert Murdoch's News Corp., which appears to be on a renewed expansion path after several years of consolidation. News Corp. has a strong presence on this list — and not just with the inclusion of sons Lachlan and James but also in various incarnations in Hong Kong, India and Germany, not to mention Murdoch-controlled British Sky Broadcasting — a central plank of Murdoch's most ambitious current venture, the launch of the worldwide satellite TV unit Sky Global Networks. The list is also filled with smaller examples of the charge toward global expansion. Virtually every territory — from Canada's Canwest Global Communications to India's UTV — has an example of a previously humble domestic venture that is now in the late stages of diversification. In addition, once-struggling territories such as Germany and Spain are now crowded with figures powerful enough — and hold enough — to shift the balance of power away from the United States and Australasia toward Europe. Nowhere is this more evident than with Vivendi's dramatic takeover of Seagram and Universal.

With the advent of the Internet and digital broadcasting, the battle for leverage in the rapidly approaching era of convergence has reached a new level of intensity. The world's global power players clearly see these new technologies as essential to their survival, and the Power 50 list is littered with visionaries intent on claiming as much real estate as possible in the new media landscape. This is most evident in the myriad of deals involving established media empires battling to acquire the little-known telecom companies that provide the essential distribution mechanisms for convergence.

This list is not intended to be comprehensive or a ranking of any kind. It is intended to be an overview of the world's most prominent and powerful figures on the international entertainment scene and was compiled with an emphasis on major territories and not emerging markets. For an expanded list of global power players please visit The Hollywood Reporter Web site at www.hollywoodreporter.com.

— Matthew Doman in New York contributed to this story.

ILLUSTRATION: ROBERT MYERS



POWER LIST



Australia

Graham Burke



MANAGING DIRECTOR,
VILLAGE ROADSHOW LIMITED

Livewire Graham Burke has worked for Village Roadshow Limited (VRL) for more than 30 years. Although a public company, VRL is controlled by the Kirby family, its founders. Under Burke's stewardship, the Kirbys have, over the last decade, stitched together Australia's largest entertainment company. VRL's core business is exhibition, with circuits in Australia, New Zealand and some Asian and European territories. After an

overly ambitious rollout, however, the company has been consolidating those interests over the past two years while reassessing "all current and future sites." In addition to radio, theme parks and film distribution (VRL represents Warner Bros. theatrically in Australia) the company now has firmly established itself as a film production minimajor through its L.A.-based division, Village Roadshow Pictures, which has a long-term joint-venture distribution and financing deal with Warners. To date, that has yielded such hits as "The Matrix" and "Three Kings."

Lachlan Murdoch



DEPUTY COO, NEWS CORP.
CHAIRMAN, NEWS LIMITED

The 29-year-old scion of Rupert Murdoch, chairman and chief executive of News, continues his ascendancy within the Murdoch dynasty after being promoted in October from senior executive vp to deputy COO under Peter Chernin. He's worked for News since graduating from Princeton in 1994, working in a range of publishing positions in Australia before assuming the helm of the company's Australian arm, Syd-

ney-based News Limited (NL). With the appointment Oct. 16 of CEO John Hartigan at NL, New York-based Lachlan Murdoch, who is one of the select few to be included in his father's management and strategy group (dubbed the office of the chairman), is now free to spend the majority of his time helping oversee the entertainment assets of the company. He will also continue running the company's American print operations, which include the New York Post and HarperCollins.

Kerry Francis Bullmore Packer

FORMER CHAIRMAN, NOW DIRECTOR OF PUBLISHING AND BROADCASTING, CONSOLIDATED PRESS HOLDINGS LIMITED

Australia's richest man, Kerry Francis Bullmore Packer, 63, was born into the media business. He is chairman of Consolidated

Press Holdings Limited (CPH), the Packer family company that holds 37% of Publishing and Broadcasting Limited (PBL), a sprawling empire including the dominant Nine Network, 25% of pay-TV market leader Foxtel, magazines, the Melbourne Crown Casino, E-commerce and a range of telecommunications interests. CPH also owns Hoyts Cinemas Ltd. The Packer fortune received a considerable hike in 1987 when Alan Bond bought the Nine Network for AU\$1 billion (U.S.\$550 million). A couple of years later, Packer bought it back for AU\$200 million (U.S.\$110 million). PBL's price tag earlier this year when telco Telstra expressed interest was AU\$10 billion (U.S.\$5.5 billion). A high roller, Packer has been known to drop — and win — millions in a night.

James Douglas Packer

CHAIRMAN, PUBLISHING AND BROADCASTING LIMITED

The 31-year-old Packer heir spent the first couple of years out of school with the pastoral division of family company Consolidated Press Holdings (CPH), helping to run outback properties. In 1989, James Douglas Packer joined Nine Network, working in various divisions and learning the business. In 1996, he was appointed CEO of PBL; in 1998, PBL chairman and CEO of CPH. He's involved in the day-to-day running of the PBL. Said to be as tough as his dad but not as volatile, he has taken PBL into E-commerce and other online and high-tech businesses.

— Australia profiles by Blake Murdoch and Jackie Lee Lewes



Brazil

Roberto Marinho

CHAIRMAN AND PRESIDENT, ORGANIZAÇÕES GLOBO

Known as Brazil's Citizen Kane, the 95-year-old Roberto Marinho controls Latin America's largest media group, Organizações Globo. While his three sons, Roberto Irineu Marinho, João Roberto Marinho and José Roberto Marinho, control the company's day-to-day operations — which include Brazil's largest broadcast TV network, cable and satellite TV services, newspaper and publishing assets, telecommunications investments and a radio network, Marinho's company has maintained its dominance of Brazilian media by positioning itself early in emerging areas such as satellite television, the Internet and wireless communications. The company's partners in cable television and Internet ventures include Microsoft Corporation, and this year it sold a 30% stake in its new Internet portal, Globo.com, to Telecom Italia for U.S.\$810 million — the largest-ever investment in a Latin American Internet operation.

— Brazil profile by Matthew Doman



Canada

Israel Asper

EXECUTIVE CHAIRMAN,
CANWEST GLOBAL COMMUNICATIONS

Leading yet another Canadian dynastic broadcaster, Israel Asper founded CanWest Global Communications Corporation in

1974 as a lone Winnipeg TV station and last year handed over the reins of Canada's third national network to son Leonard Asper as the newly installed president and CEO. Besides diversifying into radio, specialty channel broadcasting and movie and TV production, CanWest Global also has broadcast assets in Australia, Ireland and New Zealand and most recently acquired Internet service operations in the United States. Israel Asper's latest coups include acquiring the Internet and newspaper assets of Hollinger International for CAN\$3.5 billion (U.S.\$2.33 billion) and picking up nine TV stations and other assets from the former WIC Western International Communications, a rival broadcaster.

Ivan Fecan



CEO, CTV

Considered Canada's top TV programmer, Ivan Fecan was vp of programming for NBC in Los Angeles under Brandon Tartikoff before joining the Canadian Broadcasting Corporation in 1987 as head of network programming. That groomed him to become senior group vp of CTV-affiliate Baton Broadcasting in 1994. Fecan soon set about securing 100% control over CTV, Canada's largest private broadcaster, as its president and CEO. His crowning achievement came last spring when Canadian phone giant BCE paid CAN\$2.33 billion (U.S.\$1.55 billion) for CTV as part of its Internet diversification. Most recently, BCE merged CTV with the Thomson newspaper group to build a Canadian media giant that Fecan is expected to head up as CEO.

Daniel Lamarre

PRESIDENT AND CEO, TVA GROUP

Former PR majordomo Daniel Lamarre has raised TVA Group from its roots as Quebec's largest French-language broadcaster to produce English-language programming for the world market. Recently spun off from Quebec cablecaster Groupe Videotron, TVA acquired Motion International, Canada's second-largest film production company, and is eyeing English-language broadcast assets in the rest of Canada. Since joining TVA in 1997, Lamarre has set about making the Quebec channel a national network, created an international production company — TVA — International and shrewdly made powerful alliances with the Fox TV network as well as private broadcasters in France, including Canal +.

Michael MacMillan



CHAIRMAN AND CEO, ALLIANCE ATLANTIS COMMUNICATIONS

Since completing the merger of Alliance Communications Corporation and Atlantis Communications in 1998, Michael MacMillan has led Canada's largest TV and movie producer, Alliance Atlantis Communications, as its chairman and CEO. Folding the two companies' film and TV production slates into one company with a combined library of 16,000 hours was a rocky process early on. But this year, Alliance Atlantis has moved aggressively into niche broadcasting, where it owns or has a stake in 10 specialty

POWER LIST



channels. That's a long way from 1978 when MacMillan co-founded Atlantis Films Limited with college friends Scaton McLean and Janice Platt.

— Canada profiles by Eitan Vlesing



Czech Republic

Matthew Stillman

MANAGING DIRECTOR, STILLKING FILMS, PRAGUE

Tall, debonair and young, Matthew Stillman, a 31-year-old Londoner established his film production services company at Barrandov Studios less than seven years ago. Today, Stillking is the most successful of a handful of production companies servicing the booming Czech market in feature films, co-productions and commercials. Staffed by English-speaking Czech professionals, Stillking turned over more than U.S.\$20 million last year with nearly 500 shooting days, including 110 commercials and pop videos and two feature films. Recent big jobs include attracting Fox's Jack the Ripper drama "From Hell" (starring Johnny Depp) and fantasy feature "The Mists of Avalon." The thriller "The Bourne Identity" (based on the Robert Ludlum novel) is coming soon. At 6 feet 4 inches, Matthew Stillman is a striking figure whose informal air belies a commercial astuteness that would put many in Hollywood to shame. American private investor Elisabeth Goth was impressed enough to take a 20% stake in a company poised to continue to grow and develop along with the strong film and services industry based around Barrandov.

Vladimir Zelezny

HEAD, NOVA TV



A former dissident and journalist — who chronicled the Russian crushing of the Prague Spring of 1968 via mimeographed "sumizdat" underground news sheets — Vladimir Zelezny is a man many people love to hate, including former partner Ron Lauder of CME. Vladimir Zelezny's much-publicized break with CME — and the series of court battles that have been rolling out since August 1999 when he hijacked Nova TV from the control of CME operating company CNTS — has

done little to damage his reputation or the popularity of the station at home. Prague-based Nova TV, which broadcasts from premises at the city's famous Barrandov Studios, hovers around 45% market share, beating all other stations, including rival commercial station Prima (13%). Zelezny, who has been plagued by personal problems (one of his sons was convicted, for the second time, of rape earlier this year) as well as Lauder's multimillion-dollar court actions, remains buoyant, despite occasional sniping from the domestic press. Lidove Noviny (People's News), one of the Czech Republic's



POWER LIST

popular quality papers, recently (October 2000) put him at the top of a list of personalities ruining the quality of Czech Television.

— Czech Republic profiles by Nick Holdsworth



France

Patrick Le Lay

CHAIRMAN AND CEO, TF1; HEAD, TELEVISION PAR SATELLITE

Patrick Le Lay's background is in the construction industry with TF1's parent company Bouygues. This has been no impediment to his management of the network, which he has pushed to record profits in the past year. Le Lay has used the cash flow generated by TF1's dominance of the French ratings to develop successful thematic channels such as news channel LCI and Eurosport. TF1 has a 25% stake in digital platform TPS. The network is also investing heavily in the Internet, and earlier this year took a controlling stake in Charles Gassot's Telema production house. Le Lay is a shrewd political player and a harsh critic of the French government's current framework for the introduction of digital terrestrial television. However, he is seen as a cautious player who has so far failed to expand the group beyond French borders. Le Lay is strongly attached to his native Brittany and was the motor behind the recent launch of the Breton channel TV Breizh.

Pierre Lescure



CHAIRMAN AND CEO, CANAL+; FUTURE HEAD, UNIVERSAL STUDIOS

A former journalist and news anchor, Pierre Lescure, 55, has been with Canal Plus since its inception in 1983. He became managing director of the pay channel in 1986 and took over as chairman when Andre Rousselet was ousted in 1994. Highly respected in both the film and TV business, he takes a personal interest in movies, often meeting with producers and directors of even microbudgeted projects to decide whether to give the green light. Since the announcement that Canal Plus will become a 100% subsidiary of Vivendi Universal, Lescure has clashed with Jean-Marie Messier, notably over the French channel's highly prized independence. However, the hatchet has officially been buried — at least for the time being. A major question mark hangs over how Lescure will manage Universal Studios and Canal's European operations.

Jean-Marie Messier



CHAIRMAN AND CEO, VIVENDI; FUTURE HEAD OF VIVENDI UNIVERSAL ONCE TAKEOVER OF SEAGRAM COMPANY IS COMPLETED

Jean-Marie Messier, 43, has performed one of the most rapid corporate transformations ever seen in Europe, turning a sprawling water and municipal services conglomerate founded under Napoleon III into the world's second-largest media group. Since becoming chairman of Vivendi in 1996, he took the group into mobile and fixed telephony (Cegetel) and the Internet (a 55% stake in AOL France). He elbowed his way to the top of European pay television last year by snatching a 24% chunk of BSKyB. An alliance in January with U.K. mobile giant Vodafone gave him the leverage to convince Edgar Bronfman Jr. that a ménage à trois among Vivendi, its pay-TV subsidiary Canal Plus and Seagram and its Universal assets would give rise to a front-runner in the new economy.

Jerome Seydoux



MAIN SHAREHOLDER, PATHÉ; CHAIRMAN, PATHÉ'S NEWLY CREATED SUPERVISORY BOARD

Elder brother of Gaumont's Nicolas Seydoux, Jerome Seydoux, 65, transformed the textile group Chargeurs into a media company. Seydoux was the first to invest in multiplexes in France. He has also made shrewd investments in the digital platforms BSKyB and CanalSatellite, which Pathé sold to Vivendi last year for a huge profit. Pathé has since centered on film production, distribution and exhibition and on developing thematic channels. Pathé financed "Asterix and Obelix vs. Caesar," which, at U.S.\$49 million, is the most expensive French-language film ever made. In addition, the group is expected to be a candidate for one or more digital terrestrial frequencies in France. Seydoux recently handed over day-to-day management of Pathé to his long-standing No. 2, Eduardo Malonc.

Nicolas Seydoux

CHAIRMAN AND MAIN SHAREHOLDER, GAUMONT

A former financier with Morgan Stanley and heir to the Schlumberger fortune, Nicolas Seydoux, 61, bought Gaumont, the world's oldest film company, in 1974. One of France's three majors alongside Pathé and UGC, Gaumont has interests in film production and distribution (through GBVH, a joint venture with Buena Vista). Gaumont also owns France's second largest exhibition circuit. The company sold its TV production units last year. Seydoux is faced with steering Gaumont through a difficult period following Luc Besson's decision to make films elsewhere, the departure of sales and marketing chief Pierre-Ange Le Pogam (now in partnership with Besson) and the death of veteran producer Alain Poire. Half-year profits tumbled, mainly due to the poor performance of the Cannes opener "Vatel." However, the boxoffice success of Mathieu



POWER LIST

Kassovitz's "Les Rivières Pourpres" (The Crimson Rivers) should pep up full-year figures.

Guy Verrecchia

CHAIRMAN, UGC

UGC, France's leading exhibitor, also has interests in production, international film sales and distribution through UFD, as well as a joint venture with Twentieth Century Fox. Having started as an independent exhibitor in the suburbs, Guy Verrecchia has worked his way up through the ranks. He is recognized as a smart strategist, particularly in the exhibition field. Verrecchia developed the successful "Cine Cite" multiplex concept, which combines first-class screening facilities with a variety of food and drink outlets plus exhibition spaces. He has also spearheaded UGC's expansion into neighboring European territories, notably through the acquisition of the Virgin cinema circuit in Britain. Verrecchia says he believes cinema attendance in France has the potential to double. Provoking a storm in the local cinema industry with the introduction last March of the controversial *carte illimite*, an all-you-can-see subscription card, Verrecchia is rumored to be planning on taking a backseat in the next few years, leaving a question mark over the future control of UGC, which is 26% owned by Vivendi.

— France profiles by Charles Masters

Germany

Thomas Haffa

FOUNDER AND CEO, EM.TV AND MERCHANDISING

Somewhat of a fallen star since his company lost more than \$5 billion euros (U.S.\$4.2 billion) in value as its stock led the recent plunge on Germany's Neuer Markt Index, Thomas Haffa is still a man to watch. As Europe's largest producer of children's television (under the Junior TV label) and owner of dozens of national and international media subsidiaries — including Jim Henson Company and Bernie Ecclestone's Formula One racing group SLEC — Haffa is pushing forward with his goal of becoming a European Disney. Now he just has to regain the confidence of his shareholders and produce sales figures that justify EM.TV's massive market capitalization.

Herbert Kloiber

HEAD OF TELE-MUENCHEN GROUP (TMG)

Germany's minimogul, Herbert Kloiber controls the country's second-largest rights buying entity (after KirchGroup), which includes a library of over 3,000 films and some 15,000 hours of TV

series. Kloiber recently scored back-to-back coups when he sold the tiny niche station TM3 to News Corp. for a small fortune and then saw his stake in German commercial channel RTL2 rocket in value after airing Germany's version of "Big Brother." Now Kloiber is in talks to set up a second channel — most likely for resale in the near future. And Kloiber's star is about to get a lot brighter — TMG plans to go public on the German stock exchange in late 2000 or early 2001.

Thomas Middelhoff

CEO, BERTELSMANN



As head of the world's fourth largest media group, Thomas Middelhoff needs no introduction. The Düsseldorf native has run the German giant since 1998, but he has been key to the firm's expansion strategy since at least the early '90s when, as head of the company's multimedia division, he bought shares in America Online — an investment that looked risky at the time. Since being named CEO, Middelhoff has

tried to make Bertelsmann's media interests, which include Europe's largest TV entity, RTL Group, fit for the digital age. His conservative strategy of shielding the unlisted Bertelsmann from the whims of the market while taking subsidiaries such as RTL and PixelPark public has kept the company's bottom line healthy while many dot coms have seen their stocks crash. This is just fine with Middelhoff; he's now actively buying up Nasdaq victims at rock-bottom prices.

Jan Mojto

MANAGING DIRECTOR OF PROGRAMMING, PRODUCTION AND DISTRIBUTION, KIRCHMEDIA



The Slovak born Jan Mojto has long been a major mover on the German media scene. As the day-to-day manager of KirchMedia (second only to reclusive mogul Lex Kirch), Mojto oversees Germany's largest private-TV entity, ProSiebenSat.1 Media, as well as Europe's largest film and TV production group, Epsilon, a joint venture with

Italy's Mediaset. Under his direction, Epsilon's film division, Emotion, has hacked recent hits "The Sixth Sense" and "Big Momma's House" and has committed to a minimum U.S.\$500 million investment in at least 30 Hollywood films over the next three years. On the TV side, Mojto is now looking to export Kirch's success in Germany to other continental European markets.

Dr. Ron Sommer

CEO, DEUTSCHE TELEKOM

Ron Sommer, who holds a Ph.D. in mathematics, has headed Europe's biggest telecom since 1995. Prior to beginning a Telekom he spent 15 years at Sony, going from its subsidiary in Germany to the United States and then becoming COO of Sony Europe. Deutsche Telekom calls itself the world's third-largest carrier. It controls Europe's largest ISP (T-Online), one of its strongest mobile firms (D1) and, until last year, the largest cable TV infrastructure in the world (Kabel Deutschland). In 2000, Telekom began selling off Kabel Deutschland and expanding into internet



POWER LIST

tional Web and mobile telephone markets — including a reported interest in buying the U.S. firm Voicestream.

— Germany profiles by Scott Roxborough



Hong Kong

Richard Li



CHAIRMAN, PACIFIC CENTURY CYBERWORKS

Richard Li's Pacific Century CyberWorks launched a U.S.\$38 billion takeover of Hong Kong telecom services and broadband provider, Cable & Wireless HKT, in February 2000. The takeover was finalized in August. In addition, Li finally closed a much-sSpeculated deal with Australian telecom giant Telstra in October. The 33-year-old Li is credited with starting up STAR TV, now owned by Rupert Murdoch's News Corp., and all eyes are on him to see what he will be able to achieve with his broadband ambitions and his Network of the World (NOW) broadband service. The convergence platform has a fully operational studio facility in London where programs are being produced for www.now.com and for delivery over Wharf's Cable TV. Li has also invested U.S.\$100 million in Indian operations as well as U.S.\$40 million into building a studio in Japan. Plans are also under way for the development of Chinese-language content for the service.

James Murdoch



CHAIRMAN AND CEO, STAR TV

James Murdoch, youngest son of media tycoon Rupert Murdoch, took over the reins as chairman and CEO of STAR TV in May 2000. Since taking over the running of the News Corp., 27-year-old Murdoch has set in motion a series of moves to streamline the operations and to spearhead STAR's moves into the broadband era with acquisitions and joint ventures across the region. A deal with Taiwan's main cable provider, Gigamedia — which had been courted by Richard Li's PCCW — was generally viewed as a coup by STAR. In 2000, STAR has announced a hold move into Chinese programming with a U.S.\$64 million investment into TV and movie production. James Murdoch is his father's chief adviser on new media businesses.

— Hong Kong profiles by Winnie Chung



India

Subhash Chandra

CHAIRMAN, ZEE TELEFILMS

As a pioneer in India's private satellite channel business, Subhash Chandra teamed with STAR TV in 1993 to launch the Hindi channel Zee TV, which became popular as it offered an alternative to staid statecaster Doordarshan. The move gave Zee a platform to rapidly expand its bouquet of channels, making the group strong enough to now venture into telecommunications and the Internet. Considering Chandra's humble business background in his family's rice exporting business, the media mogul has proved established media companies wrong as Zee expands into foreign territories to serve the huge Indian diaspora.

Kunal Dasgupta

CEO, SONY ENTERTAINMENT TELEVISION

When it launched in 1996, SET became a serious rival to the leading Hindi network Zee TV, which proved that Kunal Dasgupta's strategy of professional marketing and brand management could work in the still evolving Indian entertainment business. Given its parent group Sony Corp. has enhanced its presence in India via Sony Music and Sony Pictures Entertainment (SPE), SET has capitalized on this advantage and will continue to do so as Bollywood ventures more towards corporatization. Dasgupta is more than willing to push on this process even further.

Peter Mukerjea

CEO, STAR TV INDIA



Since taking over as STAR TV's India chief last year, Peter Mukerjea (who previously headed the network's marketing and ad sales division) has made TV history of sorts with the runaway success of the Indian version of "Who Wants to Be a Millionaire" airing on the Hindi channel Star Plus. This has led STAR TV to finally lead the ratings for the first time, beating former partner turned-rival Zee Networks. Zee bought out News Corp.'s (STAR TV parent company

stake for U.S.\$296 million in cash and stock to end the partnership last fall. Mukerjea is also spearheading STAR TV's forays into the Internet and convergence. Very soon, STAR TV could be playing a more powerful role in Bollywood, the world's largest film industry, thanks to the advantages of parent News Corp.'s diversified media interests.

Ronnie Screwvala

CHAIRMAN, UTV

Established over a decade ago, before the Indian satellite revolution, Ronnie Screwvala's United Television (UTV) is today a multidimensional entertainment company with diversified interests including TV production, animation and cutting-edge broadband services such as its Singapore-based venture



POWER LIST

Sharkstream.com. The fortysomething Screwvalla is probably the most prepared of all media players to exploit the coming convergence revolution. With News Corp. holding a minority stake in UTV, expect more synergies covering everything from film production to digital content.

— India profiles by Nyay Bhushan



Italy

Silvio Berlusconi

FOUNDER AND OWNER, FININVEST



The TV-tycoon-turned-politician Silvio Berlusconi, 64, created private television in Italy during the 1980s and went on to expand his Fininvest into the country's second-largest industrial enterprise. In addition to Mediaset, which is Italy's top private broadcaster, the company now controls leading publisher Mondadori and the Mediolanum insurance group. In 1994 Berlusconi went into politics by creating a center-right political

force which won national elections. That year, he briefly served as Italy's prime minister, before a political crisis caused his government to fall. According to current polls, Berlusconi is now on track to become Italy's prime minister again, following elections scheduled for next spring.

Carlo Bernasconi

PRESIDENT, MEDUSA

In just five years, Carlo Bernasconi, 57, has not only managed to break Cecchi Gori's monopoly over the Italian movie production and distribution sector but has carved out a nearly equal share of the market for Medusa, Mediaset's production, distribution and exhibition unit. A chum of Silvio Berlusconi's since the days when they were both in construction business, Bernasconi started his career in 1979 as president of Reteitalia and Silvio Berlusconi Communications — forerunners of Mediaset — before moving on in 1995 to Medusa. With a gross revenue of over U.S.\$106 million in 1999, Bernasconi is now planning to get Medusa listed on the stock market.

Vittorio Cecchi Gori

PRESIDENT, CECCHI GORI GROUP

Vittorio Cecchi Gori, 57, heads Italy's top film outfit, a family owned company which became mired in red ink in the

mid-'90s after he tried to turn it into a multimedia conglomerate. Now that Cecchi Gori recently sold most of his Telemontecarlo TV network, his minimajor has plans for a stock market flotation soon. It is thus better positioned to recoup its waning glory, much of which is based on production and marketing know-how and age-old industry contacts, as well as ownership of one of the country's top exhibition circuits.



Aurelio De Laurentiis

PRODUCER, DISTRIBUTOR AND EXHIBITOR, FILMAURO

Nephew of Dino, Aurelio De Laurentiis, 51, has been in the business for 25 years. He founded Filmauro in 1975 and has since produced some of the most acclaimed Italian movies of the last two decades with directors such as Mario Monicelli and Ettore Scola and starring such stars as Marcello Mastroianni and Alberto Sordi. One of his greatest and most profitable intuitions has been a series of Christmas movies starring popular Italian comedians Christian De Sica and Massimo Boldi, which provided him with the hard cash he needed to become one of Italy's biggest distributors. In 1999, De Laurentiis entered the multiplex business with De Laurentiis Cineplex, a joint venture of Loews Cineplex International and Filmauro.

Roberto Pace

GENERAL MANAGER, MEDIATRADE



Roberto Pace, 47, became general manager of Mediatrade, Mediaset's acquisitions and production unit, in 1999. He is mostly in charge of the group's fiction and soap productions and decides which movies to buy for Mediaset's three TV channels. In the past year, he has formed alliances with Britain's Channel 4, France's GMT and Germany's Kirch Group, consolidating Mediatrade's position both in Italy and as co-producer of major fiction for the European market. Pace joined Mediaset in 1997 as vice director of

Canale 5. Prior to that he had spent several years with Italian publisher RAI, where he was in charge of international fiction.

— Italy profiles by Nick Vivarelli and Caren Davikanian



Japan

Kunitake Ando

PRESIDENT, SONY CORPORATION

Kunitake Ando has helped Sony Corp. maintain its reputation as an international leader as a producer of audio, video and TV products, as well as a major player in the information and communications and electronic components businesses. The company is currently developing hardware to connect broadband personal broadcasting networks, and in April it established Sony Broadband Entertainment as a U.S. holding company for Sony Music Entertainment and Sony Pictures Entertainment. Keeping up with the trend toward digital film technology, Sony, in fiscal 1999, set up



POWER LIST

Sony Pictures Digital Entertainment as a strategic business unit to oversee digital initiatives for the networked entertainment age.

— Japan profile by Naomi Tajitsu

Latvia

Andrejs Ekis



FOUNDER, LATVIAN INDEPENDENT TELEVISION

A former public-TV cameraman who reckoned he could do better than the studio shows he saw through his viewfinder, Andrejs Ekis established Latvian Independent Television (LNT) four years ago on the back of a computerized information service PICCA TV. A flamboyant, youthful man of 37, who describes himself as a drug dealer ("My drug is TV"), Ekis has leveraged the 1994 U.S.\$100,000 bank loan that he used to set up PICCA TV into Latvia's most successful commercial broadcaster. A shrewd operator, Ekis aims to screen some 800 movies a year and regularly buys U.S.\$200,000 and U.S.\$300,000 packages direct from the majors. Turnover last year was U.S.\$17 million; profits in 1997 (which is the last available year for figures) were around U.S.\$1.5 million. The most recent audience share figure for LNT is an impressive 37%, with LTV1 — Ekis' pubcaster — garnering 18%.

— Latvia profile by Nick Holdsworth

Mexico

Emilio Azcarraga Jean

CHAIRMAN, PRESIDENT AND CEO, GRUPO TELEvisa

Emilio Azcarraga Jean initially met cynicism, and has since won respect, after taking the reigns of the Spanish-speaking world's largest producer of TV programming after the death of his father, Emilio Azcarraga Milmo, in 1997. The 32-year-old Azcarraga took the reigns as Televisa faced its most competitive financial environment in decades. At home, Televisa faced stiff competition from upstart TV Azteca. Throughout Latin America, its Sky Latin America partnership was in battle with Galaxy Latin America's DirecTV, and on Wall Street bankers for the company were pressuring for debt reduction. Azcarraga has fought back competition at home and abroad, restructured Televisa's finances and ownership, and is trying to drag the conglomerate into the Internet age. Mexico's changing politics, which will see the December inauguration of the first opposition president in 70 years, also challenge Azcarraga Jr.

— Mexico profile by Matthew Doman

The Netherlands

John de Mol



CHAIRMAN, ENDEMOL

'Big Brother' creator John de Mol, 45, is the goose that has laid Europe's golden egg, at least in terms of format. Despite the somewhat downbeat reception the show received on CBS, in Europe "Big Brother" has been the most successful TV event of the last two years bar none. The show proved a ratings phenomenon across the continent, in Germany, France, the United Kingdom, Spain, the Netherlands, Italy and Sweden as well as generating huge amounts of newspaper coverage that was by turns enthusiastic, despairing, critical and simply bemused. While the Endemol cash tills are still registering the \$5.8 billion price tag it picked after being acquired by Spanish giant Telefonica, its chain-smoking, publicity-shy creative head is trying to shed the management burdens of running a listed company and is devoting his time to building a successor to the hit show.

Ynon Kreiz



CHAIRMAN AND CEO, FOX KIDS EUROPE

One-time windsurfing instructor Ynon Kreiz, 35, has built a billion-dollar TV company in under five years. Fox Kids Europe's IPO on the Amsterdam stock exchange last November — combined with ownership of the Saban library — has given Kreiz budgetary autonomy and an ability to dole out lucrative stock options that has other Europe-based U.S. channel heads gasping with envy. The shares delivered a healthy upside despite a stormy year on the heavily tech-laden index, and the future looks expansionist for the Euro-venture — possibly including an alliance with a broadhand partner. But Kreiz must keep U.S.-based Fox Family Worldwide stations happy and ensure that the American programming window remains wide open, if the company is to truly consolidate its position.

— The Netherlands profiles by Mimi Turner

Russia

Yevgeny Kiselyov



DIRECTOR-GENERAL, NTV TELEVISION

A member of the founding team of NTV and parent company Media-Most' jewel in the crown, Yevgeny Kiselyov has rapidly carved out a position in Russian television. He is seen as a key heavyweight pundit with as much influence in his field as was once held by America's Walter Cronkite. Kiselyov's hard-hitting reportage

and studio interview style in his trademark show "Itogi" owes its success to NTV, although it originated on the old state channel Ostankino. Troubles with Vladimir Gusinsky's Media-Most are unlikely to unseat Kiselyov, whose familiarity with the power brokers of post-Soviet Russia can be seen from the signed photos of the likes of former President Boris Yeltsin, which line the walls of his Moscow office.

— Russia profile by Nick Holdsworth



Spain

Juan Jose Nieto

PRESIDENT AND CEO, TELEFONICA MEDIA

Telefonica Media has bulldozed its way onto the A-list of international media players with aggressive acquisitions over the past year. Juan Jose Nieto, who served as CEO to Antonio Rios before a major top-level shakeup coincided with the departure of Juan Villalonga, former Telefonica boss is now the chief of the deep-pocketed Telefonica Media. The company made waves when it revealed a 15-picture film and TV slate of big-budget Spanish- and English-language fare aimed at an international market. It followed up with a pledge to invest \$100 million in Spanish cinema over the next year. Nieto's creative management style is credited with making free-TV channel Antena 3, another Telefonica company, profitable during his stint as CEO.

Javier Diez de Polanco

PRESIDENT, SOGECABLE

Javier Diez de Polanco is president of Spain's most powerful film and TV group, Sogecable, with major shareholders being the Prisa empire and Canal Plus France. Sogecable's most important holdings include Spain's leading satellite broadcaster, Canal Satellite Digital, production house Sogecine and rights broker Sogepaq. Far and away the country's biggest content provider — holding exclusive rights to Spain's professional soccer league — Sogecable has been bolstering its distribution paths, while keeping an eye on a handsome partner for its top-notch product. The company was the first Spanish media group to go public in a successful IPO launched last year, and immediately landed a coveted position on the IBEX-35, an index of Spain's 35 most valuable companies.

Andres Vicente Gomez

CEO, LOLA FILMS



Andres Vicente Gomez is unquestionably Spain's most important film producer. After finding backing from Telefonica Media by selling a 70% majority stake to the Telefonica subsidiary, Gomez unveiled an unheard of plan to produce 50 films in five years, mixing big-budget English-language features with smaller-budget Spanish films aimed at a domestic market. A development agreement forged between Lola, Germany's Kinowelt and the

U.K.'s BBC has poised the company to make a promising run at becoming a Hollywood-style European studio. Most recently,

POWER LIST



Lola has produced John Malkovich's directorial debut "The Dancer Upstairs" and Susan Seidelman's "Gaudi Afternoon."

— Spain profiles by Pamela Rolfe



United Kingdom

Charles Allen

CHAIRMAN, GRANADA MEDIA

Charles Allen, 43, carved through ITV's battle of egos this year to emerge as the most powerful executive in British commercial television when he sabotaged merger talks between ITV rivals United News and Media and Carlton Communications and acquired United's £1.5 billion (U.S.\$2.2 billion) TV assets in the bargain. The £5 billion (U.S.\$7.2 billion) IPO of Granada Media topped off a busy summer, but it looks like the soft-spoken Scot will need to draw on reserves of inner strength and vision to buttress Granada Media, which has lost more than 20% of its post-IPO value on analyst fears that advertising revenues for next year will be soft.

Waheed Alli

MANAGING DIRECTOR OF PRODUCTION, CARLTON TELEVISION

At 35, Waheed Alli is Asian, openly gay and the youngest member of the U.K.'s ultraestablishment second chamber, the House of Lords. Additionally, he is in charge of rebuilding Carlton's Communication's profile as a U.K. producer of scale and launching it onto the international stage. Alli took the Carlton post last year after the ITV broadcaster bought Planet 24, the highly rated production company he co-founded with Charlie Parsons and former Live Aid organizer Bob Geldof. But in a move that underlines their independence, the three retained the multimillion-dollar international rights to CBS smash "Castaway" under the ownership of a separate company, Castaway Productions, in which Carlton only nets a small percentage of the revenues.

Tony Ball

CEO, BSKYB



Just 18 months into the job, Tony Ball, 44, has faced down some of the biggest challenges in the satcaster's history, including the renewal of key sports contracts, signing almost 5 million digital subs and seeing off the looming presence of Vivendi on the satcaster's board. The reason? Investors are troubled by the amount of acquisition-related cash that is hemorrhaging out of the company. Added to the Premier League soccer

costs, the cost of buying Web venture Sports Internet, a controlling stake in interactive platform Open and a 25% stake in German pay-TV platform Premier World totaled more than £2 billion (U.S. \$2.9 billion). Analysts say the shares have bottomed out, however, and predict that value is set to rise.

Tim Bevan and Eric Fellner

CO-CHAIRMEN, WORKING TITLE FILMS

Tim Bevan and Eric Fellner remain the most prolific and successful producers in the U.K. film industry. Since their pairing in 1992, they have produced such boxoffice hits as "Four Weddings and a Funeral," "Bean," "Fargo," "Dead Man Walking" and "Elizabeth." Bevan and Fellner recently signed a new five-year deal with Universal Pictures and StudioCanal, putting them in the unique position to green light five movies a year with budgets up to U.S.\$25 million. The first fruit of this green-light ability, "Billy Elliot," is considered a triumph for the company. The film was produced by Working Title's low-budget division, WT2, and Tiger Aspect Pictures and is being released in the United States through Universal Focus. The company's 2000 slate includes the Renée Zellweger, Hugh Grant-starrer "Bridget Jones' Diary" for Universal and an adaptation of the best-seller "Captain Corelli's Mandolin," starring Nicolas Cage and Penelope Cruz for director John Madden.

Greg Dyke

DIRECTOR GENERAL, BBC



It's been less than a year into the top job in British broadcasting, and Greg Dyke is making good on his aggressive reputation. The speed at which BBC1 moved in October to break with 30 years of tradition by moving the flagship news show from 9 p.m. to 10 p.m. has left rival ITV bosses and regulators gasping and triggered a prime-time ratings war that has the BBC in pole position. Over the longer term, Dyke has

unveiled his blueprint to reshape the pubcaster for the digital age, with a raft of new digital online and educational channels planned. Whether it works remains to be seen, but the government — read, taxpayer — is already committed to paying for it.

Guy East and Nigel Sinclair

CO-CHAIRMEN, INTERMEDIA FILMS



Guy East, a veteran sales agent and the man behind Majestic Films, teamed with former entertainment attorney Nigel Sinclair to form Intermedia in 1996. After its merger with Moritz Borman's Pacifica Entertainment,

the company floated on Germany's Neuer Markt stock exchange in May, giving it a paper value of U.S.\$1.08 billion, of which Intermedia netted U.S.\$257 million by selling almost 9 million shares. The company recently hired former Disney veteran Jere Hausfater

POWER LIST



as president of worldwide distribution and acquisitions and has transformed itself into one of the most powerful independent entities in Hollywood, a minimajor to rival Artisan and Spyglass. In addition to pacts with a dozen or more production entities — including Sean Connery's Fountainbridge Films and Nicolas Cage's Saturn Films — it has secured a slew of high-profile projects, such as Spike Jonze's "Adaptation," the Kevin Spacey starrer "K-Pax" and Kathryn Bigelow's submarine drama "K-19." The company is also one potential suitor to form a strategic alliance with Good Machine, the production and sales outfit headed by Ted Hope and James Schamus that most recently produced Ang Lee's "Crouching Tiger, Hidden Dragon."

Barclay Knapp

CEO, NTL

Following the acquisition of U.K. No. 2 cable operator Cable & Wireless Communications last year, Barclay Knapp now sits at the top of the U.K. cable-TV world. Unfortunately he's also sitting on top of more than U.S.\$10 billion worth of debt, and despite a well-earned reputation as a demon financier, the cable sector's failure to deliver customer service could eventually signal a major downfall. Nasdaq-listed NTL's business, however, extends far beyond its cable television and includes steady revenue generators such as the U.K. wide transmission business and satellite uplinking. This alone separates the cabler from the dismal share price performance of such European rivals as NTL and Telewest, and despite some statements to the contrary, consolidation is still very much in the cards.

— United Kingdom profiles by Mimi Turner and Cathy Dunkley



Venezuela

Gustavo Cisneros

CHAIRMAN AND CEO, CISNEROS GROUP

The 55-year-old Gustavo Cisneros heads a media-centered empire that includes Venezuela's largest TV network and stakes in Latin American DirectTV operations, the U.S. Spanish-language broadcaster Univision and AOL/Latin America, a joint venture with America Online, launched in Brazil last November. Cisneros, whose Cuban-born father started the family controlled firm in the 1930s, also holds a majority stake in the Playboy Television International joint venture oversees interests in video stores, supermarkets, mining and beauty pageants. The Miami-based Cisneros Television Group has been an aggressive builder of pay-TV networks and Internet businesses. It recently tied up with Argentine-based Internet portal El Sitio to form Claxson Interactive Group — a venture aiming to be at the forefront of new and traditional media throughout Latin America, Spain, Portugal and Hispanic markets of the U.S.

— Venezuela profile by Matthew Doman