



The Future is Global

A Report on the International Council Summit

November 17, 18, 19, 2010
New York City



And please join us for the next
International Council Summit
September 14, 15, 16, 2011
Los Angeles

THE REBIRTH OF MEDIA WORLDWIDE

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Lowell McAdam

Annie Wegelius

Judy Hart Angelo, Pat Mitchell, Tony Vinciguerra

Rodney Parker, Luis Echarte, Alfonso de Angoitia

Blair Westlake



WELCOME TO THE REBIRTH OF MEDIA WORLDWIDE

For the seventeenth gathering of the International Council, The Paley Center for Media was proud to return to its New York headquarters, where we met a year ago under quite different circumstances. In 2009, the impact of the global recession and technological change had decimated the advertising market, further fragmented news and entertainment audiences, and threatened the very survival of long-established businesses.

In the year since, advertising has rebounded significantly; mass audiences have returned for the World Cup, Avatar, and other global spectacles; and social media have proven to be enablers rather than merely disruptors of legacy businesses. These indicators, among others, inspired us to select “The Rebirth of Media Worldwide” as the theme of the 2010 International Council meeting. Challenges remain, to be sure. But opportunities abound.

Over three days of intimate conversations with industry leaders, we surveyed the landscape of the global media industries represented by our members and delegates, and explored the ways in which technology and social media are breathing new life into them. We heard from the recognized leaders and the rising entrepreneurs who are keeping these industries vital. And we enjoyed many moments of open dialogue and candid give-and-take among our speakers and delegates that have been the hallmark of every International Council summit since it was founded in 1995.

In addition to generating headlines in several international industry publications, video from IC2010 sessions was featured on Bloomberg Television. And following the success of last year’s Next Big Thing session showcasing digital startups, an encore session featuring digital news entrepreneurs provided occasion to announce the Feb. 3 launch of a quarterly Next Big Thing series, premiering at the Paley Center.

In the pages that follow, you will find snapshots of our conversations and images from our three days

together, from the colloquy of the Paley Center’s Kissinger Global Conference Room to the conviviality we shared at the Hearst Tower. To view archived streams of the sessions, visit the IC 2010 video gallery on our Web site at www.paleycenter.org/ic-2010-nyc-livestream/.

We are grateful to all of our conveners, including Nikesh Arora of Google, Carol Bartz of Yahoo!, Jeffrey Bewkes of Time Warner, Philippe Dauman of Viacom, Leslie Moonves of CBS, Rupert Murdoch of News Corporation, Ricardo Salinas Pliego of Grupo Salinas, Prannoy Roy and Radhika Roy of New Delhi Television, Ivan Seidenberg of Verizon, Blair Westlake of Microsoft, Mehmet Ali Yalçindag of Dogan Yayin, David M. Zaslav of Discovery and Jeff Zucker of NBC Universal. In addition we would like to express our thanks to the principal sponsors of the International Council: Booz & Company, Burson-Marsteller, Gustave M. and Rita E. Hauser, The Nielsen Company, O’Melveny & Myers LLP, PricewaterhouseCoopers LLP, and UBS Media & Communications Group.

We look forward to seeing you again at the next IC summit.

Sincerely,



Pat Mitchell

Pat Mitchell
President and CEO
The Paley Center
for Media



Frank A. Bennack, Jr.

Frank A. Bennack, Jr.
Chairman
The Paley Center
for Media

BEYOND “OLD” AND “NEW”

BY DAVID KAPLAN

The Paley Center for Media’s International Council returned to New York City in November 2010 for its seventeenth meeting since first convening in 1995. Unlike the previous year’s summit, when uncertainty permeated conversations about surviving the global recession, IC2010 commenced with measured optimism about a healthi-

er advertising market and the opportunities presented by new technologies.

As leading executives from the most established media companies joined entrepreneurs from some of the industry’s most promising startups for three days of dialogue, debate, and intimate conversation, it was clear that we had arrived at a new common ground.

Gone were the wariness and suspicion with which “legacy” media executives and new “disruptors” regarded each other. In their place was a new understanding best articulated by entrepreneur Scott Kurnit, the founder of About.com and the new startup AdKeeper as well as a Paley Center trustee. Discussing the migration of ad spending from traditional to digital media, Kurnit argued for moving beyond the conventional ways of perceiving the media industry and its challenges.

“I don’t think it’s old media verses new media—that’s over,” he said. “We’re all in the same thing now.”

In that spirit, a central question took shape: Can we build lasting business models that offer more than mere coexistence between legacy players and the new disruptors?

The question had been percolating in various forms through the media business all year. Will tablets like Apple’s iPad “save” newspapers? Will the growth of online video streaming through Hulu or burgeoning Internet TV technologies offered by the likes of Boxee, Roku, and Slingbox provide

additional revenue streams to content companies or persuade cable subscribers to “cut the cord”? And will these new ways of accessing entertainment and news inspire consumers, finally, to pay for content?



Matt Mireles, Scott Kurnit

additional revenue streams to content companies or persuade cable subscribers to “cut the cord”? And will these new ways of accessing entertainment and news inspire consumers, finally, to pay for content?

A Cautionary Tune

As the industry struggles to adapt to these new realities, the lessons of old challenges and missed opportunities loom large. The recorded music industry remains a cautionary tale as media executives attempt to manage the disruptive digital forces upending the traditional business structures.

Presenting an overview of the global media landscape on the opening day of IC2010, Marcel Fenez, global leader of media and entertainment at PricewaterhouseCoopers, noted that, while there has been tremendous progress in getting consumers to pay for downloads on Apple’s iTunes, all too many fans prefer to get their music illegally via pirated file sharing. Live music, however, remains a vibrant category. Given the high prices for a concert ticket these days compared to the cost of a CD or \$9.99 download, there appears to be a clear disconnect in the way music is valued by consumers.

“The people paying for live music are the same ones downloading music for free,” Fenez said. “The difference is that it’s about the quality of the experience.”

“THE PEOPLE PAYING FOR LIVE MUSIC ARE THE SAME ONES DOWNLOADING MUSIC FOR FREE. THE DIFFERENCE IS THE QUALITY OF THE EXPERIENCE.”
—MARCEL FENEZ

Speaking on the final day of IC2010, Sean Parker, the cofounder of Napster and founding president of Facebook, echoed that point. When it comes to experiences that consumers are willing to pay for, Parker noted, accessibility and convenience are just as valuable as the content itself—and maybe even more.

Cord Cutting: Fact or Fiction?

Having watched the record industry frustrate that desire for accessibility and convenience—and, in turn, suffer the consequences—TV executives have been determined not to repeat that mistake. But as on-demand TV programming has proliferated on digital platforms, from networks’ own sites to streaming services like Netflix, the legacy



Sean Parker,
David Stern

platforms—pay-TV providers like cable and satellite operators—are facing a new threat.

In a presentation on the consumer experience, Dave Thomas, president of global media client services for The Nielsen Company, declared it a “myth” that cable subscribers were cancelling their service en masse in favor of “over the top” alternatives that bring programming from the Web

to the home TV set. Nielsen numbers say that only six percent of broadband households have cut the cords and retained only the Internet service connection—and that figure hasn’t changed for more than a year.

But others at IC2010 referred less dismissively to a recent report from research firm SNL Kagan, which estimated that US cable operators lost 741,000 basic video customers in the third quarter, making it the single biggest quarterly drop the firm has seen in its three decades covering the industry. Furthermore, it found that cable operators’ share of combined video subscribers fell to 60.3 percent versus 62.9 percent in the third quarter of 2009.

While those may be slender differences, it is still significant. As the economy recovers, cable companies may be able to reverse the small subscriber declines. But going forward, with Google and Apple making a bigger push into the space this year, cord cutting is not going away.

Earlier this year the TV Everywhere concept promoted by Time Warner CEO Jeff Bewkes gained traction among other cable players. The idea is to make it easy for consumers to view cable programming on just about any device, so long as viewers can be “authenticated” as paying cable subscribers. That might work, at least for the short term. Over the long term, the Internet tends to find ways of getting around walls. And if enough cable networks and consumers believe that they can get a better deal by turning to over-the-top TV and away from cable, they’ll probably do it.

The Year of the Tablet

Cord cutting, of course, is only a new permutation of what newspaper and magazine publishers have been contending with for years. As digital content remains largely free of charge and increasingly unmoored to a dedicated delivery platform, how do you get consumers to pay for it?

The glimmers of an answer have come into focus with the explosion in smart-phone use and, in 2010, the dawn of the tablet device.

For a while, the depressing assumption for media executives was that consumers wouldn’t pay more than ninety-nine cents for a song. Then, in 2007, the iPhone immediately took off, and in a short time, people who normally wouldn’t pay a dime to download an MP3 started buying downloadable applications. A year later, Apple was renting movies and selling downloads of TV programs. When Amazon came out with the Kindle, a new market emerged around an e-reader the public could embrace. Selling books at \$9.99, as well as newspaper and magazine subscriptions, gave content companies heart that paid digital content had legs (even if many of those companies bristled at Amazon’s seventy percent share of the revenue).

Then, in April 2010, Apple upended everything. Its iPad was an immediate hit. A number of publishers, including Condé Nast and Hearst, already had some success selling magazine apps for the iPhone several months before. Thanks to the iPad’s large, vibrant screen and dimensions, publishers believed the device could not only translate the glossy aesthetics of the magazine, it could preserve the traditional model in which readers and advertisers share the cost of producing the content.

Here was a device—an experience, really—that could inspire consumers to become subscribers by

“THE FUTURE OF OUR INDUSTRY IS ENTREPRENEURIAL.”
—JEFF JARVIS



Marcel Fenez

specifically is buying their magazines and newspapers.

The Future Is Entrepreneurial

Whether or not the iPad or the Samsung Galaxy or some other messianic device will “save the industry” is unknowable and beside the point anyway. What’s clear is that content producers, advertisers, and delivery platforms are evolving dramatically to meet the digital wants and needs of consumers.

For years, media executives have talked about how “content is king,” the notion that an original news report, photograph, film or video will always be more valuable than the medium or device that serves as its platform. Yet, there was an insecurity that pervaded the offices of large and small companies alike, mainly that “they wouldn’t be willing to pay for it.” Naturally, if consumers can get a song or an article for free, they’ll take it. And free, ad-supported content will likely be the main leg that all media stands on. But it won’t be the only one. After all, it never has been.

After so many years of seeing the traditional business models become more attenuated, after so much roiling change, even the most optimistic harbor deep reservoirs of doubt about what will become of the businesses that have been built over decades. At the same time, new entrepreneurs push ahead, not knowing whether their own technologies and models will be disrupted by someone else just as they reach for the top rung.

As he introduced the young entrepreneurs featured in IC2010’s Next Big Thing session, blogger and author Jeff Jarvis declared, “I believe firmly that the future of our industry is entrepreneurial.” He was talking about the news industry in particular, but the sentiment applies to the media industries at large.

And as several global industry leaders pointed out over those three days at the Paley Center last November, entrepreneurialism is not a virtue that is exclusive to new entrants and disruptors. From Hearst’s Frank Bennack to Google’s Nikesh Arora, the leaders of established media companies understand it is imperative to maintain that entrepreneurial spark, that startup-level energy.

After all, there is no old media versus new media anymore. We’re all in the same business now.

David Kaplan covers digital media for *paidContent.org*.

downloading branded applications. And the proliferation of third-party apps, like the popular news-reading app Pulse, presents a new source of monetizable online traffic for content creators.

Last September, Apple reported that it had sold 7.5 million iPads (at a base price of \$499). A recent report estimated 2010 sales of Amazon’s \$139 Kindle at north of 8 million. Deutsche Bank analyst Chris Whitmore believes Apple will sell twenty-eight million iPads in 2011.

And this is only the beginning. There is now excitement about Google’s entry into the tablet business with the Android-powered Samsung Galaxy, and the potential market for similar mid-sized tablets. Both publishers and other content providers believe that Android devices will force Apple to be more flexible about its strict terms, which currently prevent publishers from retrieving information about who

RECEPTION AT BLOOMBERG HEADQUARTERS

Left to Right:

*Scott Kurnit,
Abbe Heller*

*Angela Mwanza,
Stan Shuman,
Ynon Kreiz*

*Eija Ailasmaa,
Kristofs Blaus*

*Kenneth Sharkey,
Roger Williams*

Frank A. Bennack, Jr.



Left to Right:

*Tadashi Suzuki,
Hajime Hashimoto,
George Cooke,
Kenshi Fukuhara*

*Ken Lowe,
William C. Paley*

*Jim and Marilee
Greenwald*

*Steve Rosenbaum, Jamie
Daves, Nonny de la Peña*

*Kay Koplovitz, David
Stern, Bill Koplovitz*

*Mehmet Ali Yalçındağ,
Arzuhan Dogan
Yalçındağ, Judy Hart
Angelo, John Angelo*



CHAIRMAN'S DINNER AT HEARST TOWER

Left to Right:

Masaharu Morimoto
and sous chefs

Christy Carpenter,
Kim Catrall, Robert
Walden

Judy Hart Angelo,
Pat Mitchell, Tony
Vinciguerra

Chef Morimoto and
guests

Mehmet Ali
Yalçındağ, Arzuhan
Dogan Yalçındağ,
Nuri Colakoglu

John Loughlin,
Peter Kreisky



Left to Right:

Fehmi Zeko, Simone
Fitz Zeko

Chris Bevilacqua,
Joe Calabrese

Frank A. Bennack, Jr.

Chairman's Dinner

Marcus Samuelsson

Markus Schächter,
Takashi Hoga

Roger Williams,
Kay Koplovitz



“WE’RE IN THE ERA OF
GLOBAL CORPORATIONS.”
—JEFFREY L. BEWKES

LUNCHEON AT ‘21’ CLUB

Left to Right:

Luncheon

David Fischer,
Jamie Daves

Prannoy Roy,
Frank A. Bennack, Jr.

Tony Vinciguerra,
Ken Love

Kristofs Blaus

Edward Borgerding



SESSIONS

STILL KING— AND KINGMAKER CONVENER SESSION: JEFFREY L. BEWKES, CHAIRMAN AND CEO, TIME WARNER, INC. Interviewer: David Carr, Columnist, *The New York Times*

The past few years have been an unnerving time for major media executives. Conglomerates that ruled the globe, after decades of creating and distributing movies, TV shows, newspapers, and magazines, have been outpaced by “platform” companies.

So perhaps it was fitting that *New York Times* columnist David Carr began his on-stage tête-à-tête with Time Warner CEO Jeff Bewkes by demanding the “power seat” before going on to ask Bewkes, “Do you think the mogul era’s kind of over?”

Yes, Bewkes said. “We’re in the era of global corporations.” Old media companies, he explained, now share power with the likes of Google and Apple—companies that serve and distribute content but do not produce it, strictly speaking. “All of these new companies have basically 75 percent share—or more—of the industries they’re in.”

When Carr countered that the apparent dominance these new companies currently enjoy is by no means unshakable—as Apple has witnessed with the boom in handsets powered by Google’s Android operating system—Bewkes gratefully pointed at Carr and reminded the audience, “He said it...he’s right.”



Jeffrey L. Bewkes,
David Carr

Ultimately, Bewkes concluded, it is the content companies that will drive the power shifts among tech companies. Putting Apple, Netflix, and other tech firms on notice, the Time Warner CEO warned against getting between content companies and consumers when it comes to access. “If a tablet maker doesn’t want to have app support for our content, they will degrade the value of their product,” Bewkes said. “That’s why we have leverage... If [device makers] don’t give the full range of what a publisher wants to provide, they will hear about it from consumers.”

T I M E L I N E

Looking Back on 15 Years of Looking Ahead

Unique moments
in the history of
International Council
Meetings

Rome, Italy: September 17-19, 1995

A vital, welcome

tradition begins
as The Museum of
Television & Radio
(former name of
The Paley Center
for Media) hosts its
first International
Council, an unprec-
edented gathering
of the world’s media
leaders. The Coun-
cil—composed of

chief executives
of top media and
communications
companies—begins
tackling billboard
global industry
issues through a
series of discus-
sions with an eye
toward the future.
This premier gather-
ing of the Council—



which had been
the brainchild of
MT&R Vice Chair

Gus Hauser and
President Robert
Batscha—is unique

“AUDIENCES ALL OVER THE WORLD
ARE MORE SOPHISTICATED.
THE DAYS OF ONE-TO-MANY, IN TERMS
OF MEDIA TRANSMISSION, ARE DEAD.”
—DONALD A. BAER

SESSIONS

EMBRACING FRAGMENTATION

*Moderator: Becky Quick, News Anchor, CNBC
Panelists: Nick Brien, CEO, McCann Worldgroup;
Henrique de Castro, Vice President, Global Media and Platforms, Google; Scott Kurnit, Founder, Chairman, and CEO, AdKeeper; Christopher Vollmer, Partner and Leader, Global Media and Entertainment, Booz & Company*

Scott Kurnit, the founder of About.com and CEO of the new startup AdKeeper, didn't mince words: "I think advertising is more broken today than ever."

While his fellow panelists may not have put it so starkly, there was consensus on his point. The conventional wisdom twenty years ago—that the best way for agencies to manage a fragmented media world was to separate the buying and planning departments from the creative side—no longer applies.

After Booz & Co.'s Christopher Vollmer pointed out that the recent ad recovery has been driven by a combination of television and digital media, Google's Henrique de Castro stressed that future growth depended on greater coordination of the creative process and media planning.

Nick Brien, a veteran media buyer who was installed at McCann Worldgroup in early 2010 to oversee the venerable creative and media network, argued that the answer was not to "put them back together" but to look beyond the silos and collaborate within what has become a much broader ecosystem. "The consumer is, consciously or subconsciously, integrating all the brand experiences they



Nick Brien, Henrique de Castro, Christopher Vollmer, Scott Kurnit

have, whether it's what they saw on TV, what they're searching for, what they're seeing in the store," Brien said. "And [clients] want to have that cohesive process by which that big idea comes to life."

Kurnit argued that the agencies are actually lagging their clients in the demand for greater seamlessness in the marketing plans. In any case, the changes are happening all around media companies and advertisers, so the debate is really over. "I don't think it's old media vs. new media—that's over," said Kurnit. "We're all in the same thing now."

THE MINUTE-BY-MINUTE NEWS CYCLE

*Moderator: Pat Mitchell, President and CEO, The Paley Center for Media
Panelists: Mike Allen, Chief Political Correspondent, Politico; Donald A. Baer, Worldwide Vice Chair, Burson-Marsteller; Karen Hughes, Worldwide Vice Chair, Burson-Marsteller*

There's a good deal of anxiety running through the executive suites of media companies in the US regarding the newly minted 112th Congress. Chief among several key issues at stake are network neutrality and privacy, both of which concern the fundamental openness of the Internet as a platform for innovation and commerce.

But in Washington, anxiety about the changes wrought by the Web and social media runs both ways. The immediacy of communication and the vertiginous pace of the news cycle in our digital world have forced politicians—and the journalists who cover them—to adapt or be left behind.

Public relations masters Karen Hughes and Don Baer of Burson-Marsteller have played both ends of the political-messaging equation, as journalists and later as White House communications directors (Hughes for George W. Bush; Baer for Bill Clinton). But while Baer suggested that the digitally-enhanced, 24/7 press corps made it impossible for politicians to circumvent the press "filter," Hughes observed that social media like Twitter enabled candidates in the 2010 midterm elections to avoid mainstream outlets altogether and connect directly



Mike Allen, Karen Hughes, Donald A. Baer

with voters.

Politico's Mike Allen noted that the constant need to "feed the beast" of what Hughes called a "minute-by-minute news cycle" has altered the relationship between reporters and government officials. He recounted a conversation with a White House official who lamented that reporters are so preoccupied with blogging, tweeting, and otherwise maintaining the flow of information, that they "don't call to have a conversation anymore; they just call for a quick response." Said Allen, "Our organizations have to have the discipline to look down the road and take a breath. If we don't, our audiences will go elsewhere."

Baer and Hughes, who also served as undersecretary of state for public diplomacy, noted that the global proliferation of media had complicated efforts to broadcast a positive image of the US abroad.

"Audiences all over the world are more sophisticated in terms of their consumption," said Baer. "The days of one-to-many, in terms of media transmission, are gone. They are dead."

TIMELINE

for two additional reasons.

First, it's the only IC gathering not to be convened by a local media company. Instead, the Italian government itself generously does the honors, and meetings covering media and

politics are held at the residences and offices of **President Oscar Luigi Scalfaro**, and **President of the Senate Carlo Scognamiglio**. Second, former US Secretary of State—and MT&R Vice Chair—**Henry Kissinger** serves

as moderator for all the discussions. Talks focus on international relations, world trade, global economics, and new ideas. The list of participants includes Viacom's **Frank Biondi, Jr.** and **Sumner Redstone**; **Alan Alda**;

Loreen Arbus; **Ratikant Basu** of India's Doordarshan; and ENI's **Enzo Viscusi**.

Berlin/Bonn, Germany: July 7-9, 1996
The IC follows up its successful first meeting by ambi-

tiously stretching the discussions over two cities through the course of three days. The focus of the meeting is geared toward the East: the emerging Eastern European nations and the former Soviet Union. There is arguably

no better symbol of the seismic changes in the world, and in media, than Berlin, which hosts sessions concerning this part of the world. Bonn IC discussions center on Germany and Western Europe. Highlights of the



conference—generously underwritten by RTL

lor Helmut Kohl and President

Television and its CEO **Dr. Helmut Thoma**—include meetings with **German Chancellor**

Roman Herzog. Kissinger again serves as chief moderator of the festivities. Participants include Verizon's **Ivan Seidenberg**; **Gustavo Cisneros**; Quadrangle Group's **Steve Rattner**; Abril Group's

(Brazil) **Roberto Civita**; and Prasar Bharati's (India) **KS Sarma**.
Madrid, Spain: June 15-16, 1998
After a one-year hiatus, the IC holds its third meeting in Spain, this time graciously hosted

by, among others, **José María Mas** of Antena 3 Television and Spain's **King Juan Carlos**. Dinners are held at the famed national museums, the Arte Reina Sofia and Thyssen Bornemisza. With the IC continuing its

“YOU’VE GOT TO GROW INTERNATIONALLY
IF YOU’RE GOING TO GROW
AS A MEDIA COMPANY.”
—JEFF ZUCKER

SESSIONS

A “MODERN MEDIA EXECUTIVE” LOOKS AHEAD CONVENER SESSION: JEFF ZUCKER, PRESIDENT AND CEO, NBC UNIVERSAL

Interviewer: *Jim Cramer, Host, Mad Money (CNBC)*

On the same day that Comcast announced a major executive reshuffling at NBC Universal ahead of the two companies’ pending \$30-billion merger, NBCU’s exiting CEO, Jeff Zucker, sat down with CNBC’s Jim Cramer to reflect on his tenure and gaze into the future of content distribution.

“I think we created a cable powerhouse at NBCU that’s as good as any out there,” Zucker said, adding that his predecessor, Bob Wright, deserved credit for putting the right assets in place. And given the company’s origins as a domestic broadcast network, Zucker trumpeted NBCU’s expansion outside the US. “You’ve got to grow internationally if you’re going to grow as a media company.”

Regarding the proliferation of free television programming on digital platforms, something NBCU has pursued aggressively as a stakeholder in Hulu.com, Cramer wondered if the TV business had made the same mistake as the newspaper industry.

“No, I don’t think we’re newspapers,” Zucker said. “Newspapers do need to reinvent themselves. I don’t think television is in that kind of trouble.”

He acknowledged that content producers will eventually circumvent television networks and dis-



Jeff Zucker, Jim Cramer

tribute programming directly to consumers via the Internet. But the veteran TV executive maintained that only strong brands—particularly those that cemented their identities on traditional platforms—will find traction online.

Zucker evaded Cramer’s persistent inquiries as to his post-NBCU career plans, allowing a non-committal “maybe” when asked if the former news producer might return to journalism. But he gave a clearer indication when asked by UBS’s Aryeh Bourkoff about the intersection of content and technology he had witnessed as a “modern media executive” and where he saw himself playing a role in the future.

“That’s where I want to play—at that intersection,” Zucker said. “That’s really where the future is.”

THE COST OF UBIQUITY

Moderator: *Shelly Palmer, Host, Live Digital; and Managing Member, Advanced Media Ventures Group*

Panelists: *Aryeh Bourkoff, Global Head of TMT Banking, UBS; W. Ross Honey, General Manager, Content Acquisition and Strategy, Interactive Entertainment Business, Microsoft; Dave Howe, President, Syfy*

Even just a year ago, listening to a panel discussion about the business of broadband video, you heard a lot about “video snacking.” The idea was: small screens mean small appetites for small bits of content. Well, the omnivorous host of *Live Digital*, Shelly Palmer, says that concept has been blown to pieces.

Moderating a panel session on the ubiquity of content across platforms, Palmer proposed that viewers will watch any content on the “best available screen.” It’s not the size of the screen that matters, he concluded, it’s the availability of the content.

These days, consumers have heaping platefuls of long-form broadband video on screens big and small, and they are watching. Hulu-Plus and Netflix are widely available on portable devices. Web-to-TV services like Boxee, Roku, and Slingbox have started getting traction. And Google TV, Apple TV, and Microsoft’s Xbox Live are upping the stakes for so-called over-the-top video consumption.

In his presentation preceding the panel, Nielsen’s Dave Thomas drove home the extent to which TV viewers demand ubiquity of access. Cable providers

have done much to lay the groundwork, with “TV Everywhere” initiatives that aim to let pay-TV subscribers watch what they want, when they want, and where they want.

The hard part is finding common ground between all the device makers, content networks, and cable operators. As Syfy’s Dave Howe noted, “We streamed our first video series ten years ago, when the technology was hard, but the rights were easy. Now, the rights are hard, but the technology’s dead simple.”

In Palmer’s words, the business models are rather “lumpy”—it’s “I pay, you pay, or someone else pays,” and there’s not a lot of room to expand those options. Producing professional video content isn’t getting much cheaper. And considering that half of Syfy’s shows are viewed via digital-video recorder, which threatens the live, ad-supported model, it means the battles over authentication rights and retransmission fees will become crucial.

Naturally, all the various parties and interests have a huge stake in making the new model equitable. Over time, it probably will work out. As the technology becomes even simpler and more widely adopted, there will be some definite winners and losers in this mix. At the moment, the best bet is on the cable operators. But pressure is mounting on them too, suggesting that broadband video is still anyone’s game.

T I M E L I N E

work to advance the exchange of ideas among the world’s leaders in communications, the group zones in on the growth and future of Spanish-language programming worldwide. Participants include Grupo Clarin’s (Argentina)

Ernestina Herrera de Noble; Tribune’s **John Madigan;** and Radio Television España’s **Fernando López-Amor.**

Paris, France: October 10-12, 1999
The fourth IC meeting focuses on global communica-

tions issues as they affect programming, along with the nascent digital revolution and the impact of technology on globalism and media businesses. (One panel discussion is titled, “The Digital Revolution: A New Model for Eco-

nomic Growth?”) Hosted by Canal+, the meeting also features an address by **President Jacques Chirac,** and a work session at the Louvre. By now, the Council includes representatives from twenty-four countries.

Participants include Canal+’s **Pierre Lescure;** NBC’s **Bob Wright;** French Minister of the Economy, Finance, and Budget **Dominique Strauss-Kahn;** Yahoo!’s **Tim “TK” Koogle;** and Vivendi’s **Jean-Marie Messier.**

London, England: October 15-17, 2000

It is fitting that at a Council meeting centering on the continuing evolution of technologies and their global impact on programming, advertising, and society, the IC

hosts its largest group of delegates to date. Four panel discussions, again hosted by **Henry Kissinger,** explore controlling the flow of information and entertainment to consumers anytime and anyplace, the cost of program-

ming, and maximizing ad spend dollars. **Prime Minister Tony Blair** hosts the considerable group at 10 Downing Street, including Sony’s **Sir Howard Stringer;** WPP Group’s **Sir Martin Sorrell;** the NBA’s **David Stern;**

Elisabeth Murdoch; and Clear Channel’s **Lowry Mays.**

Vienna, Austria: October 28-30, 2001

The International Council sends an important message by going ahead

with meeting six only a month after the tragic events of September 11. While it is most assuredly a time for reflection, and for understanding priorities, it is also vital to imagine and shape a better future. Taking place in Austria,

one of the world’s most competitive television markets, now caught in a swirl of great changes, panels cover the political and economic environment, directions in programming, global expansion, and intellec-

“OLD MEDIA VERSUS NEW MEDIA—
THAT’S OVER. WE’RE ALL IN
THE SAME THING NOW.
—SCOTT KURNIT

SESSIONS

THE NEW NEWS ENTREPRENEURS THE NEXT BIG THING

Moderator: *Jeff Jarvis, Publisher, Buzzmachine.com; Director, Tow-Knight Center for Entrepreneurial Journalism, CUNY*

Presenting: *Fwix, Darian Shirazi, CEO; GoMap Riga, Kristofs Blaus, Cofounder; Pulse (Alfonso Labs), Akshay Kothari, Cofounder; Seeing Interactive, Lloyd W. Armbrust II, CEO; SpeakerText, Matt Mireles, CEO; StatSheet, Greg Foster, Board Member; Stroome, Nonny de la Peña and Tom Grasty, Cofounders*

In the past year, there has been a significant pick up in the number of acquisitions and venture capital fundings in the media space. In the coming year, the Paley Center will provide a forum for digital entrepreneurs to meet established industry leaders with the Next Big Thing, a new event series showcasing startups in media, entertainment, and technology.

In a preview of the new series, seven startups focusing on news and information presented their products to International Council attendees. The session’s moderator, Jeff Jarvis, began by pointing out that the future of journalism—indeed, of media in general—is entrepreneurial. To be sure, the entrepreneurs on the panel demonstrated a knowledge of the market challenges that was as deep as any of the media all-stars who took the stage before and after.

Presentations included platforms for location-



Nonny de la Peña

based news and information aggregation (Fwix and GoMap Riga), online advertising for local newspapers (Seeing Interactive), and collaborative video editing (Stroome). SpeakerText, a video transcription platform, aimed to make online video—what CEO Matt Mireles called “the dark matter of the Web”—more searchable and easily shared.

Two startups in particular sparked passionate debate about how news content is created and monetized.

StatSheet, which uses algorithms and sports statistics to automatically generate sports news stories, suggested a future of automated journalism (the company even refers to its network of sites devoted to US college sports teams as its “Robot Army”). But presenter Greg Foster argued that such automation would enable human journalists to focus on quality reporting and analysis that algorithms can’t replicate.

Pulse, a news reader application developed by a

pair of Stanford University grads, touched on the perennial debate between those who favor sharing online content and those who advocate locking it in a walled garden (what Jarvis calls the “link economy” versus the “ink economy”).

The app, which is available for the iPad, iPhone, and Google Android system, drew kudos from Apple’s Steve Jobs last June at his company’s Developer Conference for its clever way of organizing news feeds in a stylishly compact way. However, a few hours after Jobs praised it, Apple told the company Pulse was being removed from the App Store after the *New York Times* complained that it was infringing on its copyright.

Though the matter was quickly settled and Pulse was back in the App Store the very next day, the app’s 23-year-old cofounder Akshay Kothari was still a little nonplussed about the whole thing. “We thought we were promoting them,” Kothari said. “But they did not.”

Jarvis, who typically champions the “link economy,” played devil’s advocate, asking Kothari if he was some kind of freeloader, benefiting from the work of established media brands without paying a license fee or having a revenue-share agreement.

“One link that’s shared from Pulse can get clicked tens of thousands of times,” he said. “We’re helping [the big media companies]. We’ve only been in the App Store for five months, and we already have some partners who see value in our distribution because we’re bringing people back to their Web site.”

Tom Rosenstiel, the founder and director of the Project for Excellence in Journalism, a nonprofit organization based in Washington DC, wondered



Akshay Kothari

whether users will gravitate to a brand or a piece of content. He questioned what makes Pulse or the devices it appears on so valuable to users—is it the content it offers or the way it presents it? “Does that differ according to platform?” Rosenstiel asked. “Is it a case of mobile versus PC versus something that hasn’t been invented yet?”

And what does it all mean for the advertising revenues? While the bulk still comes from the print side, the growth is in digital.

“A lot of this comes down to the media companies providing a conversation with a marketer,” answered StatSheet’s Foster, a former VP of corporate development at Turner Broadcasting. “When I was at Turner, I thought my job was to inform and entertain, and if you’re a marketer, you can ride on my coattails, but we don’t need a deeper conversation. With digital, you simply need to have a deeper conversation.”

TIMELINE



tual property in the digital age. Austrian state broadcaster ORF serves as host and both **Chancellor Wolfgang Schlüssel** and **President Thomas Klestil** meet with the group, which also gets to see a performance of

Wagner’s classic opera *Die Walküre*. Participants include Austrian host and Director General **Gerhard Weis**; Mediaset’s (Italy) Fedele Confalonieri; France Television’s **Marc Tessier**; NTV’s (Russia) **Boris Jordan**; and

Grupo Salinas’s (Mexico) **Ricardo Salinas Pliego**.

Beijing, China: November 5-7, 2002 For the first time, the IC gathering heads to Asia, and the growing media superpower that is

China. Eighty media executives from around the world—the biggest gathering yet—meet in Beijing for the conference hosted by **Bruno Wu’s** Sun Media Group and SINA.com. Choosing China is fitting: The nation has

experienced rapid economic growth, with significant strides made in its media industry—vital for a country poised to host the Olympic Games several years down the road. And though interaction with international

media has expanded by this point, the growing infrastructure still comes as a welcome surprise to a familiar IC figure: **Dr. Kissinger**, who helped open up the country to foreign relations in 1971. “When I first came here, there

were only two TV channels and very few stations,” he said. “Now it has so many of them . . . I have to work hard to get a better understanding of the Chinese media market.” The IC helps everybody do so, with panels



covering the radically changing media world, the evolution of state-sponsored television, and advertising in the post-dot-

“THE INTERNET IS NOT
A ZERO-SUM GAME.”
—NIKESH ARORA

SESSIONS

PROTECTING LIVING BRANDS

CONVENER SESSION:
**PHILIPPE DAUMAN, PRESIDENT
AND CEO, VIACOM, INC.**

*Interviewer: Pat Mitchell, President and CEO,
The Paley Center for Media*

Viacom’s Philippe Dauman certainly saw signs of a rebirth in media. The company’s cable networks were enjoying a seven percent increase in ad revenues, its MTV network has been riding high on the ratings success of reality series *Jersey Shore*, and its EPIX movie channel recently struck a \$1-billion deal with streaming service Netflix.

In a luncheon interview with the Paley Center’s Pat Mitchell at New York’s iconic 21 Club, Dauman pointed to MTV’s transformation from a music video channel into a successful series programmer as evidence of the need to evolve and reinvent.

“These are living brands,” he said of MTV Networks, which also includes Nickelodeon, Comedy Central, VH1, and Spike TV. “The MTV brand is not the same one from five years ago.”

Addressing familiar concerns that online video will drive cable subscribers to cancel their service, Dauman appeared to agree with Nielsen’s Dave Thomas, whose presentation that morning characterized so-called “cord cutting” trends as largely mythical. Dauman explained that Viacom declined to renew its programming relationship with video streaming site Hulu because the model wasn’t right, though Viacom executives continue to consider it.

Dauman also discussed the decision to sell Har-



Philippe Dauman

monix, the maker of the once high-flying Rock Band video game franchise. “The recession and the competition from Guitar Hero left us with a lot of costs and little revenue,” he said. “Plus, we don’t have the expertise to compete in the game console business, though we are a leader in casual online gaming.”

But the big question concerned Viacom’s planned appeal after losing its \$1 billion copyright infringement lawsuit against Google and YouTube. (The company filed its appeal of the June ruling in early December 2010.) Although he acknowledged the legal setback, Dauman feels Viacom achieved a victory for the wider media industry.

“A year after we filed the lawsuit, YouTube started to do filtering of unauthorized content,” Dauman said. “They didn’t have that. We played a part in helping the ecosystem evolve. The reason we were at the forefront is because we own our content and our audience is disproportionately young.”

GOOGLE’S CULTURE

OF “YES”

CONVENER SESSION: **NIKESH ARORA,
PRESIDENT, GLOBAL SALES OPERATIONS
AND BUSINESS DEVELOPMENT,
GOOGLE**

*Interviewer: Chrystia Freeland, Editor-at-Large,
Thomson Reuters*

Even as Google has expanded in the past decade well beyond its search-engine origins to become a major player in online video, display advertising, mobile operating systems, and now, with Google TV, people’s living rooms, search still remains at the heart of its business.

But search and exploration are not merely integral to Google’s advertising business—they are core existential values for a company whose interest in developing a driverless car strikes many as a symptom of “mission creep.”

It’s about what Google’s Nikesh Arora calls a “culture of saying ‘yes’”: “The more times you say, ‘yes,’” he told Reuters’s Chrystia Freeland, “the more likely you’re going to have people innovating and coming up with great ideas.”

But where Google sees endless horizons for extending its reach, others believe that there are areas of vulnerability. Maybe Mark Zuckerberg means it when he says that Facebook’s forthcoming messaging system isn’t necessarily a “Gmail killer.” And maybe TV programmers and cable operators don’t want to give Google TV a chance. It doesn’t mat-



Nikesh Arora, Chrystia Freeland

ter what other company’s plans are where Google is concerned, Arora said.

“The Internet is not a zero-sum game,” he said—the world of the Web is too spread out, too diffuse, too populated to be dominated. Arora speculated that within the next five to eight years, roughly eighty percent to ninety percent of people’s time will be spent on Web-based media products. While he would count Google and Facebook among the fifteen or twenty players who will power the bulk of consumers’ media consumption, no one company will claim the head of the table.

That’s not to say Google will be content to take a backseat to any other company, particularly on the advertising front. Given the company’s hegemony over search ads and its increasing share of display, Google will be well-positioned to benefit from the day when there’s little differentiation among ads that appear on TV, the Web, smartphones, or everywhere else.

TIME LINE

com age. At a state dinner, China **President Jiang Zemin** also addresses the participants—a list that includes Chinese luminaries **Zhao Huayong**, President, China Central Television; **Tian Congming**, President, Xinhua

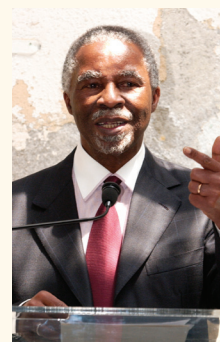
News Agency; and **Ma Chaojun**, President, Beijing Radio, Film and Television Group. Other execs include CBS’s **Leslie Moonves**; Viacom’s **Mel Karmazin**; Star Hong Kong’s **James Murdoch**; **Hubert Burda**; BBC’s **Greg**

Dyke; and **Haim Saban**.

Cape Town, South Africa: October 24-26, 2004

It is indeed a highlight of the eighth conference for delegates to visit the cell on infamous Robben Island

where Nelson Mandela was held prisoner through much of his 27-year term. Again, the choice of conference site speaks to history, coinciding with the tenth anniversary of democratic government and the end of apartheid. In a



meeting cosponsored by South African Broadcasting Corp. and Primedia Ltd., the agenda covers everything from how South Africa fits into the world from a geopolitical perspective, to a study of technology and

consumer behavior, to the civic role of media in fostering democracy and public trust. This last panel, appropriately, takes place at The John Craig Hall on Robben Island. At a luncheon, South Africa **President Thabo**

Mbeki speaks to the participants, including **Barbara Walters**; Pan-African Advisory Group’s (South Africa) **Iraj Abedian**; Microsoft’s **Craig Mundie**; **William C. Paley**; News Corp’s **Marty Pampadur**; SBS Broadcast-

ing’s **Markus Tellenbach**; and Seven Network’s (Australia) **Kerry Stokes**.

Montreal, Canada: October 23-25, 2005

The ninth conference—and the first one held in

North America—is notable for zeroing in on, as one panel title sums up, “Preparing for the ‘Anytime, Anywhere’ Consumer and the Shifting Distribution Landscape.” “Traditional broadcast business models are under

stress,” writes conference cohost **Leonard Asper** of CanWest Global in the days leading up to the event. “The biggest concern for all broadcasters is to remain visible to consumers in an ocean of new competition, and

“IT’S NOT ALL ABOUT ADS, IT’S ABOUT CONNECTING PEOPLE TO THE THINGS THEY CARE ABOUT, INCLUDING BRANDS.”
—DAVID FISCHER

SESSIONS

WHAT ARE HALF A BILLION FRIENDS WORTH?

Moderator: David Kirkpatrick, Author, The Facebook Effect, and Columnist, The Daily Beast
Panelists: Wendy Clark, SVP, Integrated Marketing and Communication, Coca-Cola; David Fischer, VP of Advertising and Global Operations, Facebook; Steve Hasker, President Media Product Leadership and Advertiser Solutions, The Nielsen Company

In his remarks at the opening of the International Council meeting, Hearst CEO and Paley Center Chairman Frank Bennack joked that if he heard the phrase “social media” one more time, he would scream. But for marketers like Wendy Clark of Coca-Cola, the explosion in the use of social media, particularly Facebook, is reason to scream for joy.

That’s because Facebook, in the estimation of the *Daily Beast’s* David Kirkpatrick, whose book *The Facebook Effect* chronicled the company’s origins, is perhaps the most targetable media channel in history, with users that volunteer all sorts of valuable information that marketers can mine. And when they “like” a brand on Facebook, they become what Coca-Cola’s Clark calls “hand-raisers”—engaged consumers who collaborate with marketers in strengthening the brand (Coca-Cola

“hand-raisers” on Facebook currently number north of twenty-one million).

This so-called “earned media”—as opposed to paid advertising—is what marketers are finding so valuable in the social Web. “It’s not all about ads,” said Facebook’s David Fischer. “It’s about connecting people to the things they care about, including brands.”

That’s not to say such marketing is free. While it may not have a “media expense,” Clark said, “it has a significant resource expense,” in terms of the staff and time devoted to maintaining a Facebook page or responding to Twitter messages from an active consumer base.

Beyond marketing, Clark foresees Facebook and other social networking sites as a



Steve Hasker, Wendy Clark, David Fischer, David Kirkpatrick

way to bring in more direct sales. “People could end up buying Cokes with Facebook credits,” she says. “If they could develop that, that would reduce the barriers to selling our product.”

That’s something local newspapers and directories, those chiefly disrupted by social media, could never have imagined providing, noted Nielsen’s Steve Hasker. But with the local advertising landscape still up for grabs, traditional media like newspapers and broadcasters, with large, established followings, may yet benefit from the forces that have so challenged their legacy ad models.

As companies play more and more in the social space, however, they will need to tread carefully around growing privacy concerns and find ways to engage consumers without appearing too invasive. The lines of what consumers will and won’t accept are fluid, Kirkpatrick said.

While the proportion of ad spending devoted to social media is still small, said Hasker, the access such networks provide to an audience of engaged, connected consumers will only grow more valuable. “From a marketer’s perspective,” he said, “it is a place where experimentation is well and truly worthwhile.”

AOL’S ACQUIRED CONTENT STRATEGY

A CONVERSATION WITH TIM ARMSTRONG, CEO, AOL

Interviewer: Betty Liu, Anchor, Bloomberg TV

Reflecting on the roughly \$9 billion AOL spent on a range of acquisitions prior to his arrival as CEO in 2009, Tim Armstrong said much of that money could have been spent in a more focused, targeted way.

The company has been on an acquisition tear lately, buying the TechCrunch blog, how-to video site 5min, and social media software startup Thing



Tim Armstrong

T I M E L I N E

to remain relevant to the advertisers who provide our revenues.” Highlights from the event include **Kay Koplovitz** moderating “The View from the Financial Markets” panel, other panels on digital piracy and the future of

advertising, and an address from **Prime Minister Paul Martin**. BellGlobemedia/CTV CEO **Ivan Fecan**; Publicis North America’s **Susan Gianino**; Advance.net’s **Steve Newhouse**; SanomaWSOY’s (Finland) **Jaakko**

Rauramo; and NBC Universal’s **Richard Cotton** are among the participants.
Istanbul, Turkey: September 14, 2006
The tenth IC event, coinciding with the thirtieth anniversary of the Museum of Television & Radio

(former name of The Paley Center for Media), focuses on globalization, a fitting topic given the setting in one of the world’s most majestic, historic locations. The event offers a fine mix of culture and discussion. On the one

hand, the whole group lodges at the famed Ciragan Palace, a gala dinner is held at Dolmabahce Palace, meeting sessions take place at Esmâ Sultan and optional tours of the Byzantine Cistern & Istanbul Archaeology Museum are of-

fered. On the other hand, discussion topics include how to reach the millennial generation and, most pointedly, “Media as an Agent of (Mis)understanding (Between the Muslim and non-Muslim World).” Among the stellar

list of participants: prominent businesswoman **Arzuhan Yalçındag**, who established the joint venture CNN Türk with AOL Time Warner; BBC’s **Mark Thompson**; ITV’s **Charles Allen**; Atlantic Records’

Ahmet Ertegun; and NBC Universal’s **Bob Wright**.

Silicon Valley, United States: June 13-15, 2007
It is appropriate that this IC conference carries the theme of “Convergence: What’s

Next?,” given the myriad changes to the IC event and the organization. Eight days before the conference, the Museum of Television & Radio is renamed The Paley Center for Media, with the IC meetings evolving

to a much larger scale, held over a three-day period of panels, discussions, and events. The meeting is held for the first time in the United States, and is hosted by Google, Yahoo!, and Sun Microsystems in Silicon

Valley. Speaking pointedly to the theme, cohost **Eric Schmidt** of Google says, “People will say, ‘I want all of my world, all of my media, and I want it now.’” While one panel covers how search is revolutionizing

SESSIONS

Labs last fall. And it is investing aggressively in local news network Patch. It's all part of a strategy focused strictly on content and tools to build ads around it.

"The vast majority of Internet usage at this point is related to content, and we are building significant brands," he said. "We're the largest Internet company that has a universal strategy in terms of partnering with other companies."

Speaking of partners, Armstrong dismissed rumors about a possible merger with Yahoo!, saying that it was considered before he arrived at the company and then dropped.

"I'm not going to comment on Yahoo!," he said. "If we can find a way to expand the reach of our content and our advertising, we'll look at it. But the stuff in the press about Yahoo, there is nothing active now."

So were the press reports about the latest talks accurate? asked dogged Bloomberg anchor Betty Liu. Said Armstrong with a sly smile: "It depends what you've been reading."



Lowell McAdam

OPEN FOR BUSINESS

A CONVERSATION WITH LOWELL McADAM, PRESIDENT AND COO, VERIZON COMMUNICATIONS

Interviewer: *Stephanie Mehta, Executive Editor, Fortune*

Lowell McAdam didn't say whether or not Verizon would be the next licensed carrier to sell Apple's iPhone after AT&T's exclusivity deal expires. But he didn't issue any strong denials either.

However, McAdam, who is expected to rise to CEO when the current Verizon head Ivan Seidenberg retires, did venture into the debate over open versus closed systems. Producing a Samsung Galaxy, a tablet device powered by Google Android, from his pocket, he said that Google's challenge to Apple dominance in the mobile space offers important lessons about platform strategy.

"The big advantage Android has for media companies is that they allow much more openness, where companies get to customize their content with a greater degree of latitude than Apple allows," he told Fortune's Stephanie Mehta. Apple, of course, defends its tight controls by arguing that it ensures that apps will simply work better. But Apple has ceded some of the ground to Android in doing so. As a result, McAdam said that more apps are being developed for Android right now, closing the numerical lead Apple currently has.

"Apple was so restrictive about who had access, that it opened the door for Google," he said. And [Google CEO] Eric Schmidt ran through it with a freight train. It's going to be very difficult for Apple to close that."

THE ACCIDENTAL INTERNATIONALIST

A CONVERSATION WITH DAVID J. STERN, COMMISSIONER, NBA

Interviewer: *Richard Sandomir, Columnist, The New York Times*

National Basketball Association Commissioner David Stern considers himself an internationalist. By that, he means "someone who got thrown in the mix and realized globalization was going to have some legs."

Stern, who has run the NBA for more than thirty years, found himself in the mix back in 1983, when he got a knock on his door from an executive inquiring about buying games for broadcast in Italy. Back then, the NBA had a deal with CBS that allowed the network to resell only the games they aired. In 1983, that amounted to only three.

So, when the executive asked if the NBA sold games for broadcast abroad, Stern replied, "Of course, we sell them!" What do you charge? the executive asked. Well, what do you pay CBS? Stern countered. \$5,000 a game? That's our rate, too! replied Stern. With that, the NBA was in the international business.

Things didn't really click for the NBA's international expansion until 1991, when the league struck its first deal with China. Initially, there was no ad revenue to share, but Stern bet that early entry into China would pay off. Today, the NBA has deals with



David Stern

fifty different entities there, and the league is making money. Other slow starts in the UK, Spain, and Russia are working well too.

The league's digital expansion has enabled it to tap into a global youth market. "Attitudinally, this is a young person's sport," and that has helped the NBA build its business abroad, in spite of cultural barriers. "Even in places like the UK, our research tells us that, among 12-24 [year olds], we're the number two sport behind soccer," he said. "If you count up all the teams, we have sixty million followers on Twitter and ten million on Facebook. It's keeping us young."

TIMELINE



distribution, another takes on the growing topic of how

social networking is changing business. Says **Dan Schein-**

man, SVP and GM of Cisco Systems, Inc., "I would tell you at the end of the day, community beats search, and that community is going to be more powerful as a way to find what we care about than search." Among

the IC participants: CBS Interactive's **Quincy Smith**; YouTube's **Chad Hurley**; Yahoo!'s **Jerry Yang**; MySpace's **Josh Berman**; California Governor **Arnold Schwarzenegger**; Yahoo!'s **Terry Semel**; and Sun Mi-

croSystems' **Jonathan Schwartz**. **London, England: June 20, 2008** Another first for the International Council: Given the growth in scope for the conferences, it is decided to add a second, smaller event each year.

The first of these marks the IC's return to London eight years after its successful trip. With considerable shifts in the media landscape, the agenda on this full June day includes topics such as regulation, innovation,



and the challenges that Muslim and non-Muslim relations pose to the development and growth of media in many companies around the world. Featured speakers include Vodafone's **Arun Sarin**; **Yang Lan**, businesswom-

an and talk show host often referred to as "the Oprah of China"; WPP's **Sir Martin Sorrell** and WPP Chairman, **Ambassador Philip Lader**; NTV's (Russia) **Sergey Piskarev**; Bebo's **Joanna Shields**; and the

Moby Group's (Afghanistan) **Saad Mohseni**.

New Delhi and Bangalore, India: November 16-19, 2008

The traditional, larger events of the IC are here expanded to four

SESSIONS

A SELLER'S MARKET

Moderator: Anna Carugati, Group Editorial Director, World Screen

Panelists: Don Browne, President, Telemundo; Joe Calabrese, Chair, Entertainment, Media and Sports Practice, O'Melveny & Myers; Annie Wegelius, Director of Programs, Sveriges Television

Providing a perfect segue into her panel session on the international programming market, *World Screen's* Anna Carugati noted that she happened to be working with the Italian group that approached David Stern about rebroadcasting NBA games in 1983.

Back then, the European TV business, taking its first steps into a deregulated marketplace, was dependent on content acquired from other places. That hunger for international programming remains, said Annie Wegelius of Sweden's Sveriges Television, now driven by the explosion of digital channels and demand for "anything decent" coming out of the global market.

That's good news for US-based Spanish-language broadcaster Telemundo. President Don Browne recalled the company's decision to reinvent itself as a producer of original content, enabling it to cut acquisition costs and drive revenue by selling its programming overseas.

Echoing a point emphasized by PricewaterhouseCoopers's Marcel Fenez in his global overview,



Annie Wegelius, Don Browne, Joe Calabrese, Anna Carugati

O'Melveny & Myers's Joe Calabrese said that a live event is one of the surest bets you can make. The singularity of a live broadcast or simulcast gives it unique value, Calabrese said, "And the people who are controlling the rights are doing pretty well."

"I THINK WE ALL AGREE THAT MEDIA HAS THIS TREMENDOUS EFFECT OF PLANTING IDEAS THAT LATER GROW INTO THINGS. WE TAKE THAT RESPONSIBILITY VERY SERIOUSLY."

— RICARDO SALINAS

CONNECTING WITH IDEAS

CONVENER SESSION:

RICARDO SALINAS, CHAIRMAN, GRUPO SALINAS

Interviewer: Pat Mitchell, President and CEO, The Paley Center for Media

As the head of a company that touches nearly every aspect of Mexican life, from banking and automobiles to television and wireless telecommunications, Ricardo Salinas, of the Mexican conglomerate Grupo Salinas, embraces the power of media to effect social change.

Talking with Pat Mitchell about the violent drug war in Mexico—and what he sees as the news media's undue fixation on civilian deaths—Salinas lamented that the war has taken the focus away from pressing social issues like education and health. "I'm very concerned about the importance of media in forming and shaping a nation's ideas," he said.

In addition to reaching Mexicans via TV Azteca, the country's number two broadcaster (as well as Mexican-Americans via Azteca America), Grupo Salinas has invested heavily in Iusacell, which controls the largest amount of wireless spectrum in Mexico. Salinas relished the social and educational possibilities of connecting 160 million Mexicans to broadband.

"I think we all agree that media has this tremendous effect of planting ideas that later grow into things," Salinas said. "We take that responsibility very seriously."



Ricardo Salinas

TIMELINE

days, allowing the group to meet both in Delhi, India's political capital, and Bangalore, its technology center. The theme of the meetings—"India: Challenges of the Next Media Frontier"—is covered in a series of talks and panels

focusing on the local developments and growth in a burgeoning Indian market that constantly faces new frontiers. As Paley Center President and CEO **Pat Mitchell** puts it, "The opportunities of the future and the challenges of

the past make India an ideal setting to show how media can embolden a people and a planet." Hosted by Zee Entertainment, NDTV, and Wipro Technologies, and co-organized by the Federation of Indian Chambers



of Commerce and Industry (FICCI), the meeting's panels boast titles such as

"Introduction to the Indian Media Landscape," "Investing in Indian Media/

India Investing Beyond its Borders," "Reaching the Youth Market," and the far-thinking topic "How Media is Improving the Quality of Life Worldwide." Participants and attendees include hosts NDTV's **Dr.**

Prannoy Roy; Zee Entertainment's **Subhash Chandra**; and Wipro's **Azim Premji**; plus former UN Under-Secretary **Shashi Tharoor**, **Henry Kissinger**, Australian Broadcasting Corporation's **Mark Scott**; Google In-

dia's **Shailesh Rao**; and UTV's **Ronnie Screwvala**.

Berlin, Germany: June 7-8, 2009

For 2009, the Paley Center extends the mid-year conference to two days, and goes back to offering the flagship

three-day event in the fall. For the spring, the IC focuses on Europe and the sometimes-conflicting relationship between public and privately held companies. Key speakers include News Corp's (Europe and Asia) **James Mur-**

doch; RTL Group's **Gerhard Zeiler**; and Bloomberg's **Andy Lack**. Panel discussions cover the borderless programming of formats, with two sessions on Central Europe concentrating on the state of the region's media

landscape and the "delicate dance between politics and media."

New York City, United States: November 18-20, 2009

For the first time, the IC meets at the Paley Center's New

“ONE PRINCIPLE ALWAYS PREVAILS:
IF YOU’VE GOT THE BEST PRODUCT,
YOU WIN, AND IF YOU DON’T, YOU DON’T.”
—FRANK A. BENNEACK, JR.

SESSIONS

NAPSTER COFOUNDER WANTS TO SAVE THE MUSIC INDUSTRY A CONVERSATION WITH SEAN PARKER, COCREATOR, NAPSTER; FOUNDING PRESIDENT, FACEBOOK

Interviewer: David Kirkpatrick, Author, The Facebook Effect; Columnist, The Daily Beast

What Big Problems remain in the media business, problems that demand solutions? That’s the question digital entrepreneur Sean Parker believes Internet and digital-media executives should be asking themselves.

For Parker, the Big Problem today is the same one he set out to address a decade ago when he cofounded the music-sharing service Napster: media distribution in the digital age.

“We recognized that the copyright industries were going to undergo a serious transformation and the notion that content without a container to sell it in was a destabilizing, disruptive thing,” he told David Kirkpatrick of The Daily Beast. “We didn’t realize that the record companies wouldn’t find that was inevitable.”

While the advent of Apple’s iTunes established a platform for legal downloading, digital music sales are flat. “Unless there are bold new approaches to the distribution of music,” Parker said, “then the recorded music business as we know it may cease to exist.”

The solution? Spotify, a European music-streaming service for which Parker is an investor and



Matthew Hiltzik, Sean Parker, David Stern

advisor. Currently in late-stage negotiations with major labels to make the service available in the US, Spotify offers access to music in the cloud within a closed system.

Although Spotify offers a free tier, it is betting music fans will pay a subscription fee for unlimited access from any device. And while such access to a cloud-based music library would seem to discourage actual ownership, Parker believes the social tools for recommending and discovering new music will encourage consumers to continue paying per-download to build their collections.

As the founding president of Facebook, and a crucial source for Kirkpatrick’s *The Facebook Effect*, Parker understood early on the long-term potential of the social network, perhaps even more than the creator, Mark Zuckerberg. Given that capacity for anticipating behavioral shifts and big-picture changes in the media industry, Parker’s bet on Spotify just might deliver on the hidden promise of Napster: to save the music industry.

THE 120-YEAR-OLD STARTUP CONVENER SESSION WITH FRANK A. BENNEACK, JR., CHAIRMAN, THE PALEY CENTER FOR MEDIA, AND VICE CHAIRMAN AND CEO, HEARST CORPORATION

Interviewer: Pat Mitchell, President and CEO, The Paley Center for Media.

At first glance, Hearst Corp. would appear to be the epitome of establishment media in all its forms, from newspapers to magazines to local TV stations. But for Paley Center Chairman Frank Bennack, on his second tour of duty as Hearst’s CEO, the 120-year old media giant is a laboratory for constant innovation and reinvention.

In 2002, when Bennack stepped down from the post he had held since 1979, he was able to say that eighty percent of Hearst’s earnings were from businesses that the company didn’t have when he first took over. That ethos guides him still.

“You’re constantly running a startup,” observed the Paley Center’s Pat Mitchell.

Indeed, the company, which had a “new media” division before there was new media, has launched a number of internal digital initiatives, including an App Lab for developing applications for tablets and mobile devices. And it recently appointed an advertising director focused on tablet media.

If the Internet element of Hearst’s print business and what comes in from readers exceeds fifty per-



Frank A. Bennack, Jr.

cent, says Bennack, “we’re gonna have a very good business.” And he’s already seeing movement in that direction. “We’re probably around twelve percent today. We’re asking the reader to pay more, and the core readers will do that. As to the devices, maybe one-third of all circulation will be on devices within five years. But the ability to bring advertising there is critical.”

Rectifying the mistakes publishers made in the early days of the Internet is part of what drives Hearst’s commitment to innovation. But in the end, it’s not the latest technology that will save the established media companies. “One principle always prevails: If you’ve got the best product, you win,” Bennack said. “And if you don’t, you don’t.”

T I M E L I N E

York headquarters, and is convened by the heads of the major US media companies: **Frank Bennack**, CEO of Hearst and chairman of the Paley Center; Time Warner’s **Jeff Bewkes**; Viacom’s **Philippe Dauman**; CBS’s

Leslie Moonves; Verizon Communications’ **Ivan Seidenberg**; Disney Media Networks’ **Anne Sweeney**; and NBC Universal’s **Jeff Zucker**. Over 150 executives attend. Keynote speakers include **Henry Kissinger**;

Ted Turner; AOL’s **Tim Armstrong**; FCC Chairman **Juli- lius Genachowski**; and **Dick Parsons**, chairman, Citi- group and former chairman and CEO of Time Warner. The meeting also features the debut of the ThinkSocial

Awards, an initiative to recognize social media companies promoting positive change around the globe.

Monte Carlo, Monaco: June 9, 2010
Coinciding with the 50th anniversary

of the Monte Carlo Television Festival, the IC’s mid-year meeting focuses on the viewing experience of the future. Convened by **Paolo Garimberti** of RAI (Italy), **Christine Ockrent** of Audio- visuel Extérieur de la France, **Markus**

Schächter of ZDF (Germany), and **Dick Wolf** of Wolf Films, sessions explore new trends in programming and delivery, with input from, among others, producer and director **Barry Levinson**, **Annie Wegelius** from

Swedish Television, and **Ynon Kreiz** of Endemol. The day closes with a cocktail reception at Monaco Palace hosted by **HSH Prince Albert II**.

New York City, U.S.: November 17-19, 2010

For its seventeenth meeting, the IC returns to the Paley Center’s New York home for a three- day program conceived around the theme “The Rebirth of Media World- wide.” Conveners including **Ricardo Salinas Pliego** of

Grupo Salinas, **Mehmet Ali Yalçındag** of Dogan Yayin Holding, **Nikesh Arora** of Google, and **Dr. Prannoy and Radhika Roy** of NDTV join some 160 attendees from 16 countries for intimate conversations in the Paley

Center’s Kissinger Global Conference Room and New York’s famed 21 Club. Featuring panels on advertising, program- ming, and content delivery, and keynote sessions with **Frank Ben- nack**, NBA’s **David**

Stern, and Napster co-founder **Sean Parker**, among others, IC2010 also provides occasion to announce the launch in 2011 of the Paley Center’s forward-looking “Next Big Thing” series showcasing digital startups.



Becky Quick, Marc Graboff



Christopher Vollmer, Nick Brien



Gus Hauser, Jeff Bewkes, Herb Granath



Matt Mireles



Jeff Jarvis, Frank A. Bennack, Jr.



Kristofs Blaus

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- Pat Mitchell**
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Jim Cramer, Jeff Zucker



Sean Parker



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ABOUT THE PALEY CENTER FOR MEDIA

The Paley Center for Media

The Paley Center for Media, with locations in New York and Los Angeles, leads the discussion about the cultural, creative, and social significance of television, radio, and emerging platforms for the professional community and media-interested public. Drawing upon its curatorial expertise, an international collection, and close relationships with the leaders of the media community, the Paley Center examines the intersections between media and society. The general public can access the collection and participate in programs that explore and celebrate the creativity, the innovations, the personalities, and the leaders who are shaping media. Through the global programs of its Media Council and International Council, the Paley Center also serves as an independent setting where media professionals can engage in discussion and debate about the evolving media landscape. Previously known as The Museum of Television & Radio, the Paley Center was founded in 1976 by William S. Paley, a pioneering innovator in the industry. For more information, please visit www.paleycenter.org.



The Media Council at the Paley Center for Media

A dynamic think tank for the digital age, Media Council brings together senior-level industry executives for provocative discussion, enlightening reflection, and no-holds-barred debate about the trends and issues influencing the media. For more information about the Paley Center's Media Council and the upcoming schedule in New York and Los Angeles, please visit www.paleycenter.org/mediacouncil.

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ABOUT NEXT BIG THING



The Next Big Thing is a new series of quarterly gatherings designed to showcase new entrants and disruptors in the media, entertainment, and technology spaces by bringing them together with established leaders and investors in those industries. The series will launch with sponsorship from AdKeeper, the new venture from entrepreneur and Paley Center trustee Scott Kurnit, and Velociter, the strategic investment arm of Mediabrands.

A mix of elevator pitches, open debate, and cocktail conversation, the Next Big Thing will provide a forum for rising innovators and entrepreneurs to meet the pioneers and pillars of the media industry. Each gathering will feature short presentations and product demos by new entrepreneurs outlining their businesses and strategies for success followed by intimate discussion with a select audience drawn from the Paley Center's Media Council, and other leaders and innovators in the new media, technology, and venture capitalist communities.

For more information, please visit www.paleycenter.org/nextbigthing.

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Gus Hauser is the founding sponsor of the International Council and Media Council at The Paley Center for Media and vice chairman of the institution. Rita Hauser is president of The Hauser Foundation.



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