

SUMMARY

TELEVISION IN SPAIN	2
A season full of promises on Antena 3.....	2
A strengthened daytime.....	3
TELEVISION IN NETHERLANDS	4
An autumn of Reality.....	4
TELEVISION IN GERMANY	5
Super RTL posted the most successful six months in its history	5
Ski Jumping rates available	5
The new TV season of RTL II.....	6
RADIO IN THE NETHERLANDS	8
Growing audience for RTL FM and Yorin FM	8
RADIO IN FRANCE	8
TRILOGIK the new radio package in Greater Paris	8
DATA SHEET: Sectorial surveys	9
PORTFOLIO	11

TELEVISION IN SPAIN

A season full of promises on Antena 3

Antena 3 has released its new TV schedule for the Autumn season, combining a range of high profile new shows with long-running successful programmes.

After a huge success in Italy and France “La granja de los famosos” (The farm of celebrities) will hit the Spanish screens from September 2004 onwards. The series charts a group of celebrities who live on a 19th Century farm without electricity or water and surrounded by farm animals. Antena 3 plans to offer overviews on weekly daytime as well as weekly Prime Time and late night shows.

Prime time includes an extensive range of blockbuster movies for the ‘El Peliculon’ Monday night movie. Amongst those scheduled to be shown are Lord of the Rings and Moulin Rouge). “El Peliculon” is the highest watched movie night on Spanish television with, on average an audience share of 25.8% audience share in adults 13-54 ABC 1 from September 2003 to June 2004. In the last season Antena3 has attracted record audience numbers with its prime time comedy series “Aqui No Hay quien viva” and “Mis adorables vecinos” which are scheduled to be shown. A new comedy series is also planned: “El inquilino” (The lodger) about an alien who has to take on the body of a human.

New on Antena 3



MARÍA TERESA CAMPOS host of the new morning magazine



“LA GRANJA DE LOS FAMOSOS” (the farm), entertainment



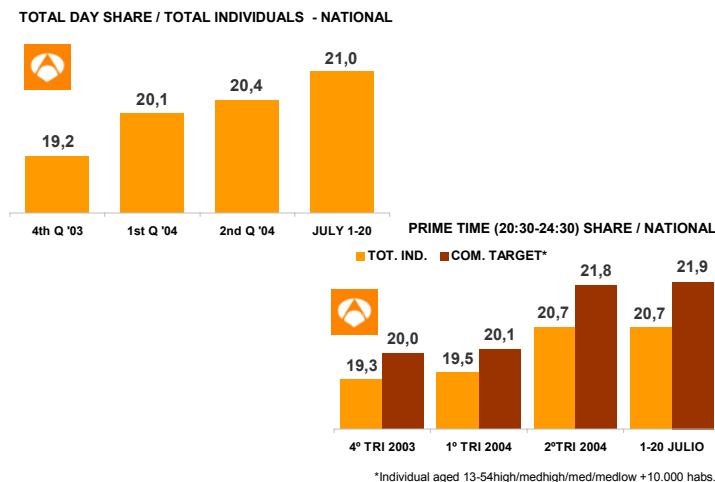
“EL INQUILINO”(the lodger), comedy series

A strengthened daytime

Known as the “Queen of the morning” in Spain, Maria Teresa Campos will be presenting a new talk magazine in a morning slot on Antena 3. Broadcast for the past 8 years on a competitor channel the programme proved to be a great success. Augustin Bravo has empowered Antena3’s morning slot last season with “Hablame de ti” last season is scheduled to move to the afternoon with a new female orientated magazine “A la Carta”. In the lead is the talk show “El Diario de Patricia,” which is back in the late afternoon slot.

The audience share on Antena 3 has significantly grown over the past season. With promising new shows, the arrival of new TV stars and the return of successful programmes Antena 3 is guaranteed of a very good season in 2004/2005.

Antena 3 keeps growing...



TELEVISION IN NETHERLANDS

An autumn of Reality

The upcoming TV season planned for the Netherlands will be rich in reality TV. The successful American and English programmes will initially be broadcast before potentially being adapted locally.

The reality US show starring Donald Trump "The Apprentice" starts the 3rd of September on RTL 4 and will be called "Trumps Troonopvolger". Another success program is coming on RTL4 : Popstar the Rival starts the 25th of September. A new format, that has nothing to prove regarding its previous performances across Europe, appears on RTL4: "Wife Swap" ("Jouw vrouw, mijn vrouw"). It starts in October, after the diffusion of the British episodes.

In the autumn Yorin will offer the 2nd edition of the Dutch version of "The Bachelor" , as well as the 1st season of "De Farm" with Dutch and Flemish contestants surviving in a remote farm. Both shows will be shot on location in the splendid South African landscape. Yorin will broadcast this year a large range of Reality TV programs in their original version too, such as America's next top model, The Osbournes 2, The Simple Life (with Paris Hilton), My Big Fat Obnoxious fiancé, Gordon Ramsay's Hell Kitchen.



TELEVISION IN GERMANY

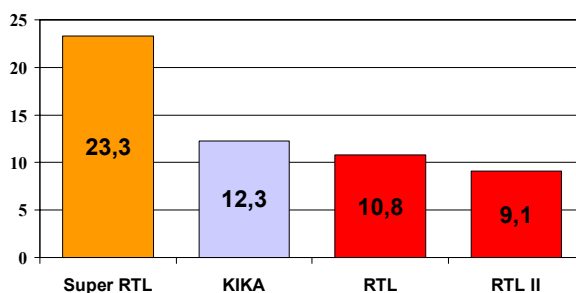
Super RTL posted the most successful six months in its history

During the first semester of 2004, Super RTL the German channel dedicated to Children and Mothers recorded a 23.3 percent market share against children 3- 13. This is the best ever audience share.

Disney programmes, cartoons, TOGGO Music and the new show “**Die Entdeckerzone**” are the cornerstone of Super RTL’ s programming strategy. They were key contributors to this record audience: “Die Entdeckerzone” achieved a 32% share making it the most popular science programme for Children. In the meantime, **Toggo music** proved that kids are also interested in music. Its 23 percent market share makes the programme the most successful music show dedicated to children in Germany.



Children audience share (%)
All day / January- June 2004



Source: AGF/ GFK PC#TV, Panel (D+EU), Mon-sun., 03:00 – 03:00, Child.3-13

Ski Jumping rates available

RTL has transformed Ski Jumping into one of the top Sports Events on German television. German viewers have been fascinated by the Ski Jumpers in past seasons. Ski Jumping attracts up to 8 million viewers of afternoon broadcasts.

09/09/2004

The next season promises to be just as successful as the former. 14 Live events will be broadcast from the 28. of December 2004 to the 23. of January 2005; The ski Jumping programmes will mostly be broadcast on weekend afternoons, which is ideal to reach the target group of young men. *Contact your local IP NETWORK office to get more info on the new Ski Jumping season on RTL..*



The new TV season of RTL II.

RTLII reinforces its position as TV trend setter for young adults.

RTLII launched the first season of Big Brother in 2000 and despite early scepticism it proved to be a huge success. In its 5th season, RTLII will transform the concept into a year-long daily soap with increased response from German Viewers.

RTL II has also built itself a reputation as the home of the most innovative prime time Docu-soap formats. "Frauentausch", a Wife swap-like concept, which has been an amazing success for the station. Amongst several human-interest series we can mention an upcoming magazine on babies entitled "Pampers TV" and a factual documentary on plastic surgery.

RTL II has broadcast a full range of property and decoration programmes such as "Die Puzteufel" (How clean is your house?). A new docu-game soap is also scheduled to be aired entitled „Mission Traumhaus: Deutschlands verrückteste Baustelle“ („Mission Dreamhouse: The building site“) where teams compete against to renovate a dream home.

The programme grid is also largely opened to fiction that appeals to young (male) adults such as the Sc- Fi series Stargate series and its upcoming spinoff "Stargate Atlantis" alongside the third series of 24.

09/09/2004

Daytime viewing will include US sitcoms (such as Full house or Jesse) and manga cartoons in the afternoons. The new series “WB KIDS” will be launched, which comprises of daily screenings of Warner Bros classic cartoons.



RADIO IN THE NETHERLANDS

Growing Audience Shares for RTL FM and Yorin FM

RTL FM and Yorin FM announced that they have achieved a significant increase in audience shares. From May-June 2004 both radio stations achieved an upturn and recorded a joint share of 5.6 percent of Adults 10+ (source: Intomart GFK, 07:00 – 24:00 Monday – Sunday).

Since its start a year ago RTL FM is making a name for itself in the market and recorded a 3.4% market share in Adults 20- 49. The radio station broadcasts hits of yesterday and today along with the best of Dutch music. Yorin FM is has also risen to 4.9% in its core target group of Adults 20- 34. Yorin has just introduced a new “modern pop-rock” music programme and profits from the arrival of famous DJs and anchormen.

RADIO IN FRANCE

TRILOGIK the new radio package in Greater Paris



TRILOGIK is a new radio package that reaches 1.6 million Parisian adults aged between 25- 49 in one week.

TRILOGIK is a perfect combination of three complementary FM music stations:

- RTL 2 an adult contemporary station which airs airing pop-rock music, which targets working adults 25- 49
- Fun radio that reaches Adults 15- 49 thanks to its dance-groove- hits music line-up and famous on air radio hosts.
- MFM- the gold station- broadcasts music from the year 1975 to nowadays with priority to French artists. MFM's core target is Women aged 25- 49.

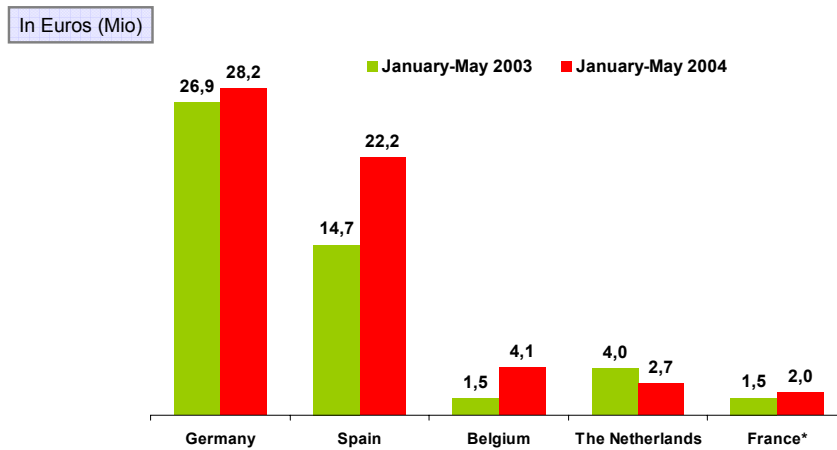
TRILOGIK allows you to reach 37% of Adults 25- 49 within one week and 50% within 3 weeks. This is an easy to buy package as there is one booking for the 3 radio stations, which proves cost effective with a 20% discount granted on the normal rate card price.

DATA SHEET: Sectorial surveys

Through the vast marketing resources of our media, we are able to tap into a wealth of information to create an **exclusive choice of international surveys that suit advertisers & advertising agency requirements**.

Don't hesitate to contact your local IP NETWORK office to get a list of available presentations!

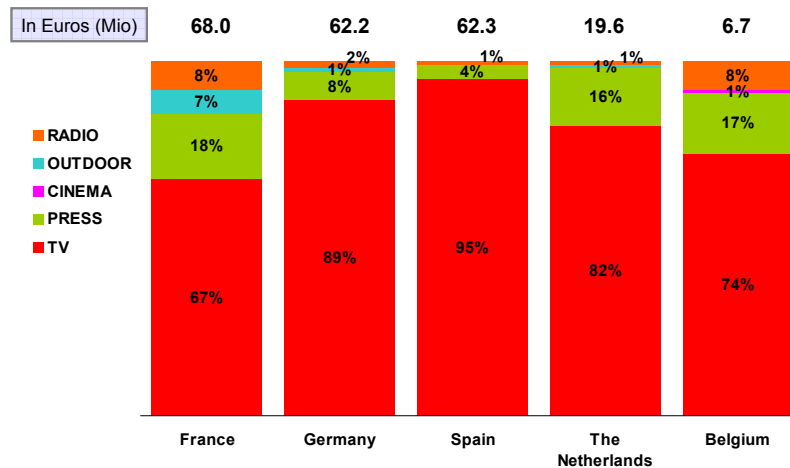
Media expenditure- Pain Killers sector



* OTC advertising is allowed in France for all non prescription non reimbursable medicines in all media

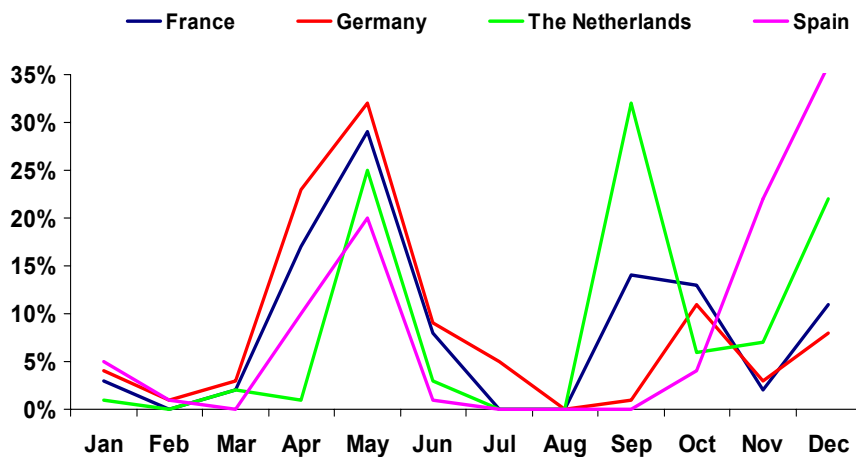
Source: France : TNS Media Intelligence / Germany : Nielsen S+P / The Netherlands : BBC / Belgium : MDB / Spain : Infoadex

Media split 2003- Delicatessen sector



Source: France : TNS Media Intelligence / Germany : Nielsen S+P / The Netherlands : BBC / Belgium : MDB / Spain : Infoadex

Seasonal media expenditure 2003- Vacuum cleaner sector



40% of total investments in April- May and 19% in December

Source: France : TNS Media Intelligence / Germany : Nielsen S+P / The Netherlands : BBC / Belgium : MDB / Spain: Infoadex

Top 5 advertisers by country 2003- Perfume sector

In Euros (000)

France			NETHERLANDS			GERMANY		
ADVERTISERS	TOTAL	TV Share	ADVERTISERS	TOTAL	TV Share	ADVERTISERS	TOTAL	TV Share
Chanel	20 185	32%	Hugo Boss	4 763	100%	Hugo Boss	9 428	89%
Christian Dior	18 249	26%	Cacharel	4 065	77%	Chanel	8 158	55%
Lancome	14 866	38%	Lancome	3 350	69%	Emporio Armani	7 632	86%
Hugo Boss	13 272	100%	Armani	2 634	81%	Lacoste	4 158	86%
Kenzo	10 169	25%	Chanel	2 534	60%	Attraction	3 948	87%
SPAIN			BELGIUM					
ADVERTISERS	TOTAL	TV Share	ADVERTISERS	TOTAL	TV Share			
Hugo Boss	27 327	85%	Chanel	2 110	48%			
Lancome	9 385	61%	Hugo Boss	1 810	99%			
Dior	9 278	62%	Cacharel	1 759	77%			
Lacoste	8 406	91%	Dior	1 739	32%			
Chanel	7 892	49%	Lancome	1 409	56%			

Source: France : TNS Media Intelligence / Germany : Nielsen S+P / The Netherlands : BBC / Belgium : MDB / Spain: Infoadex

PORTFOLIO

TELEVISION

Austria

RTL, Super RTL, RTLII, VOX

Belgium

RTL-TVI, Club RTL, Plug TV, VTM, Kanaal 2, Jim TV

Germany

RTL, RTLII, Super RTL, VOX, n-tv, RTL Shop

Hungary

RTL Klub

Luxembourg

RTL Tele Letzebuerg

The Netherlands

RTL4, RTL5, RTLZ, Yorin

Poland

Polsat

Slovenia

SLO1, SLO2

Spain

Antena3

Switzerland

RTL, RTLII, VOX, Super RTL

RADIO

Belgium

BEL RTL, Fun Radio, Radio Contact, Contact 2, Nostalgie, BFM, TOP Radio

France

RTL, Fun Radio, RTL2, Sud Radio, Wit Fm, Mfm

Luxembourg

RTL Letzebuerg, Eldoradio

The Netherlands

Yorin Fm, RTL Fm