

Charterhouse has grown into a major force at the cutting edge of print management leading the way forward with its ideas and initiatives. For many years it has dealt with a long list of blue-chip clients and established a pedigree of print management with the aim to constantly exceed its clients' expectations.

Its aim is to lighten its clients' workload and reduce their cost. From the very first meeting it participates fully with its client's creative team. By understanding a client's objectives at an early stage Charterhouse can draw on its experience and expertise to develop the practical solutions to meet their needs.

One of the keys to Charterhouse's success is the experienced team of print professionals who can provide a personal service on-site so ensuring a quick response and guaranteed results. And yet when it comes to print buying Charterhouse is totally independent, with no in-house press capacity of its own. This means they can select the right printer for the job, the right specialist that fits the timescales and the right cost for the budget. It also means that Charterhouse can get on with doing what it is good at, controlling the quality of the colour, and managing the process from reception to the delivery.

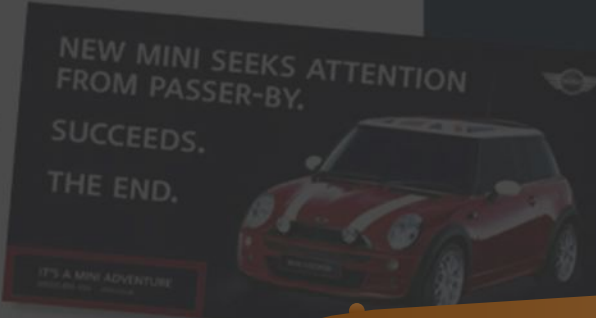
Ten years ago Managing director, Gary Mahony, recognised that the market for print was changing and print management had emerged as the way forward. While in the early 1990s many companies were cutting back on their print buying departments to concentrate on their core activities, Charterhouse adapted to meet the needs for quality advice and professional guidance. Apart from the print management services, it also acts as a consultant to companies with needs for print related products.

One of the company's major strengths is that across all of the account teams there is a very strong print manufacturing background and are all very aware of the strengths and weaknesses of each of the processes. They handle a huge variety of projects, including above-the-line advertising work, point of sale, direct mail, cardboard engineering and in-branding projects with a few exceptions for the technical side of printing. Above all they can provide

Recent examples of Award work



Right and below: Outdoor posters



Charterhouse

The growing demand to control print spending, cut lead times yet maintain quality in a dynamic business environment requires a special skills-set. Charterhouse has developed an enviable reputation for success in a demanding sector.



Recent examples of work

creative solutions to any creative challenges that are placed their way.

Today, Charterhouse has a 17000 sq ft tower and growing teams who handle account work, either from Charterhouse's headquarters in Holford or within its client's offices, working side by side to meet instantly to their clients' production needs. It still maintains an office in the West End in order to be close to a number of its clients, major advertising agencies, which include WCRS, Publicis Dialog, Wicken & Kennedy handling projects for Nike, Honda, Conoco, BMW, Renault and many more.

Charterhouse's work is split between direct clients and advertising agencies. It now has contractual relationships with clients such as Marks & Spencer, Wicken

"The appointment of Charterhouse as our print management company has enabled Wicken to cost effectively control the quality and quantity of all our in-store print."

"Charterhouse has made a valuable contribution to the service and creative standards provided by Publicis Dialog to our customers. Their wide-ranging knowledge base, purchasing standards, production marketing and creative services have exceeded our expectations and helped us meet our deadlines and client briefings."

"We have been working with Charterhouse for over four years. The service they have provided has always exceeded our expectations and they have helped us to reduce our print costs. Due to the Charterhouse's expertise and attention to detail we have been able to produce our print materials on time and to a high standard."

solution to each and every production need. Charterhouse has an extensive array of digital proofers, flexos and step systems in order to be able to manage any job & receive from a design house. When a file comes in, the client's requirements will light the way and approve the client's branding before progressing further. Nothing is left to chance. It also runs the best proofing press, a good example being the use of technology in a new way, for example to check colour on CTP plates. Many clients rely on it for quality checking of their work.

A great deal of time and investment has also been spent on bespoke MIS and e-management systems to track and record the progress of a print job. Charterhouse totally believes in the value of electronic systems but also recognises the importance of the human touch. MIS systems are in place as a substitute for face-to-face interaction with its clients. It is a balance of communicating with its clients off-site, but the personal touch is still the core principle at the heart of the job. Charterhouse works.

Charterhouse has a full network of suppliers and prefers to work in partnership with these suppliers to achieve efficiencies, rather than using their purchasing muscle to force prices down.

In a world where companies are re-examining marketing to reduce costs and improve processes, enhance quality and receive high levels of responsive service Charterhouse are perfectly positioned to deliver to a growing and demanding market.

www.charterhouseuk.com
Gary Mahony, Managing Director

Экономика медиа: концентрация



ВЫСШАЯ ШКОЛА ЭКОНОМИКИ
НАЦИОНАЛЬНЫЙ ИССЛЕДОВАТЕЛЬСКИЙ УНИВЕРСИТЕТ

Сращивание капиталов

■ Сращивание капиталов различных отраслей с медиакапиталом:

■ Медиабизнес (СМИ)

- СМИ
- Книжный бизнес

■ Культурные индустрии

- Звукозапись
- Киноиндустрия
- Театр

■ Индустрия развлечений и зрелищ

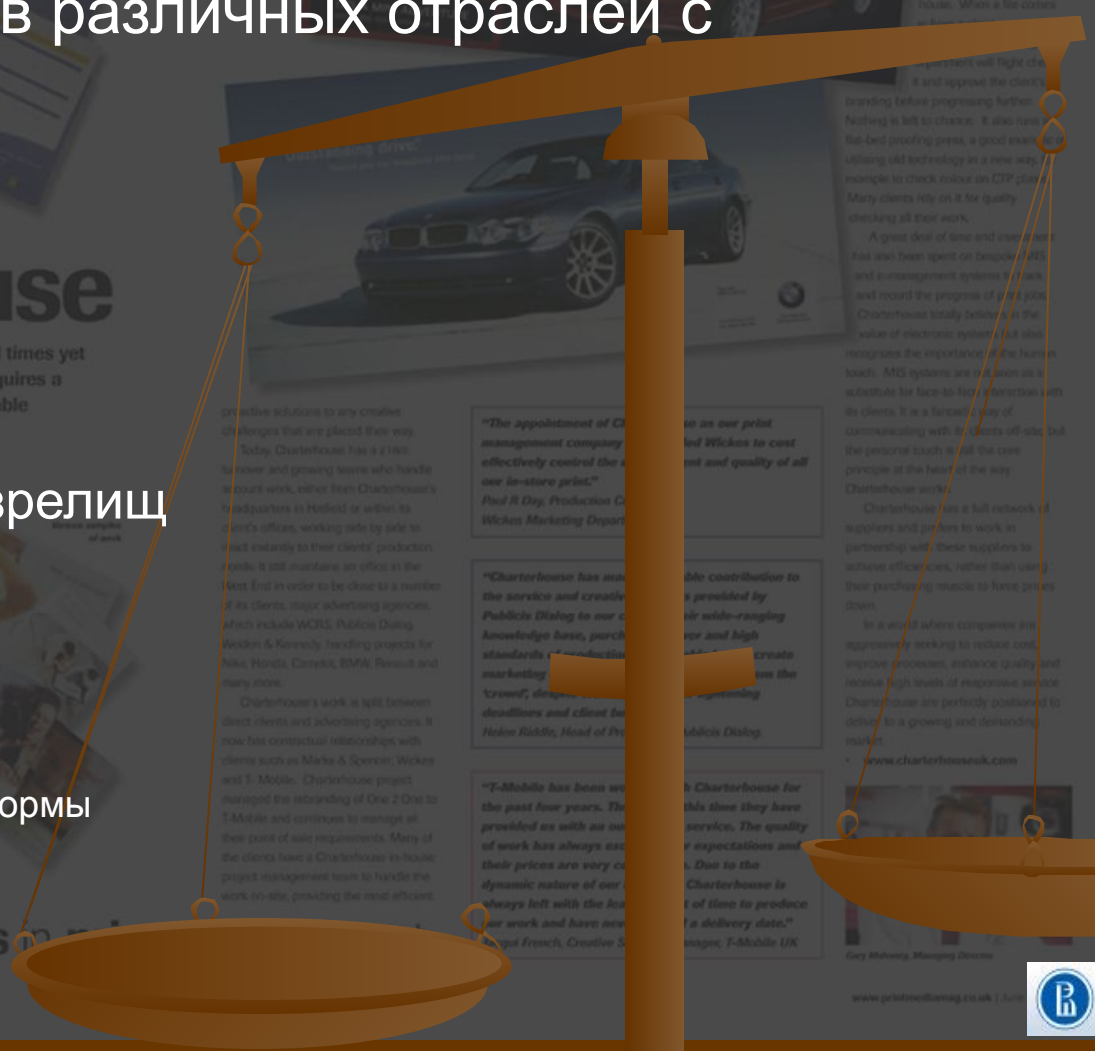
- Спорт
- Развлекательные парки

■ Телекоммуникации

- Мобильная связь
- Интернет
- Кабельные и спутниковые платформы

■ Информатика

- Компьютерные игры



5 «КИТОВ»

Time Warner



News Corporation



Viacom Company



Walt Disney



Bertelsmann



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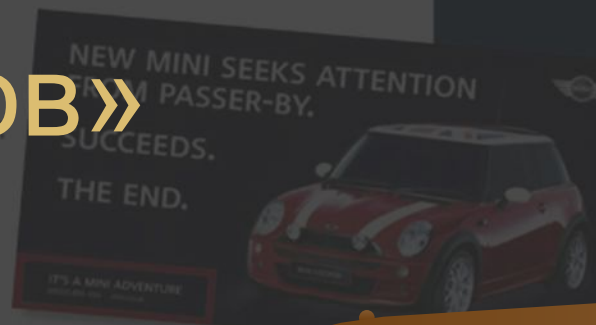
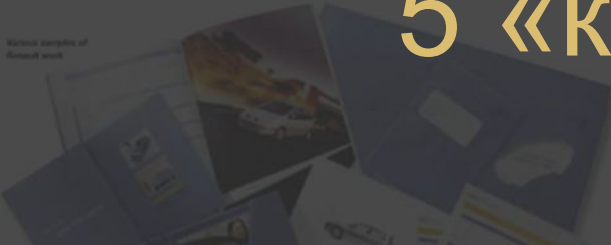
Its aim is to lighten its clients' workload and reduce their cost. From the very first meeting it partners with its client's creative team. By understanding a client's objectives at every stage Charterhouse uses its experience and expertise to provide practical solutions to meet its needs.

One of the keys to Charterhouse's success is the experienced professionals who can provide a service on-site so ensuring a quick response and guaranteed when it comes to print. With Charterhouse's totally integrated in-house press capacity. This means they can select the printer for the job, the right fit for the business and the right budget. It also means that you can get on with doing what is good at, controlling the quality of the print and managing the process from the delivery.

Ten years ago Managing Director, Mark Wicks, recognised that print was changing and print management had emerged forward. While in the early 1990s companies were cutting back on their own activities, Charterhouse was growing. It was obliged to meet the needs of its clients and professional growth from the print management also acts as a consultant to clients with views to print reform.

One of the company's strengths is that across all of its activities it has a very strong print background and are all well equipped with the strengths and weaknesses of the print process. They handle all projects, including sleeve advertising work, point of sale, cardboard engineering, rebranding projects with appreciation for the technical side of printing. Above all they can provide

Recent examples of Award work



solution to each and every production need. Charterhouse has an extensive array of digital proofers, flexos and step systems in order to be able to manage any job it receives from a design house. When a file comes in, Charterhouse will fight the client and approve the client's branding before progressing further. Nothing is left to chance. It also uses the best proofing press, a good example being old technology in a new way, for example to check colour on CTP plates. Many clients rely on it for quality checking of their work.

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www.charterhouseuk.com

"The appointment of Charterhouse as our print management company has enabled Wicks to cost effectively control the quality and quantity of our in-store print." Paul R Day, Production Controller, Wicks Marketing Department

"Charterhouse has made a valuable contribution to the service and creative excellence provided by Publicis Dialog to our clients through its wide-ranging knowledge base, professional standards, creative marketing solutions and ability to meet deadlines and client briefs." Helen Fittles, Head of Publicis Dialog

"Mobile has been with us for the past four years. They have provided us with an excellent service. Their work has always been of a high quality and their prices are very competitive. The dynamic nature of our business means we are always left with the feeling that we have new work and have new challenges to meet." Gary Milway, Managing Director

...exceeding expectations



Еще концерны

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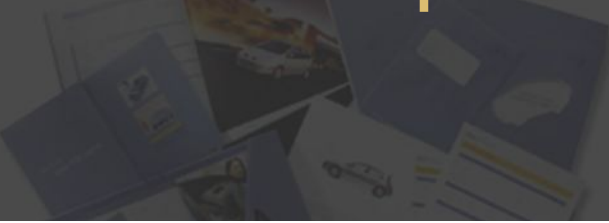
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Ten years ago Managing director, Gary Mahoney, recognised that the market for print was changing and print management had emerged as the way forward. While in the early 1990s many companies were cutting back on their print buying departments to concentrate on their core activities, Charterhouse stepped in to meet the needs for quality advice and professional guidance. Apart from the print management services, it also acts as a consultant to companies with needs for print related products.

One of the company's major strengths is that across all of the account teams have a very strong print manufacturing background and are all very aware of the strengths and weaknesses of each of the processes. They handle a huge variety of projects, including above-the-line advertising work, point of sale, direct mail, cardboard engineering and rebranding projects with a fine appreciation for the technical side of printing. Above all they can provide

Recent examples of Award work



solution to each and every production need. Charterhouse has an extensive array of digital proofers, flexos and top systems in order to be able to manage any job it receives from a design house. When a file comes in...

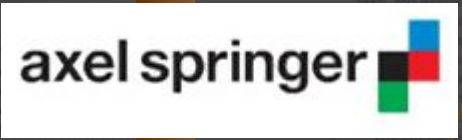
It and approve the client's proof before progressing further. It is left to them. It also means that old technology is a new way to check colour on CTP plant. Clients rely on it for quality. They all their work.

A great deal of time and attention has been spent on developing IT management systems to track around the progress of a print job. Charterhouse's systems track the value of electronic systems and recognise the importance of the human element. From an initial consultation with Charterhouse, the client is kept off-line and the client's own staff are kept in the loop.

NBC Universal
Телевизионный и кинобизнес



Axel Springer
Издательский бизнес



Vivendi Universal
Кино, телевидение, музыка



Pearson
Издательский бизнес, телевидение



CBS Corporation
Телевизионный бизнес

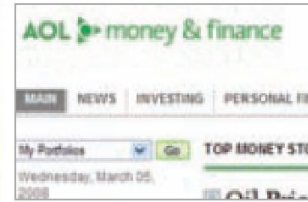
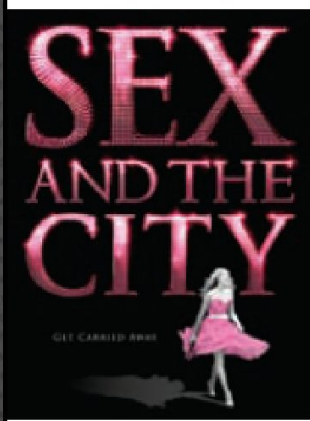


Time Warner

- Создан в 1920-х гг. на базе кинокомпании и журнальной периодики. В начале 2000-х был слит с AOL и превращен в AOL-TW. В 2009 г. разделен снова.

Доход 28,97 млрд. долл. (2011)

Операционная прибыль 5,8 млрд долл. (2011)



...exceeding expectations



Бизнесы AOL TW

□ Networks – кабельные телеканалы (47% доходов):

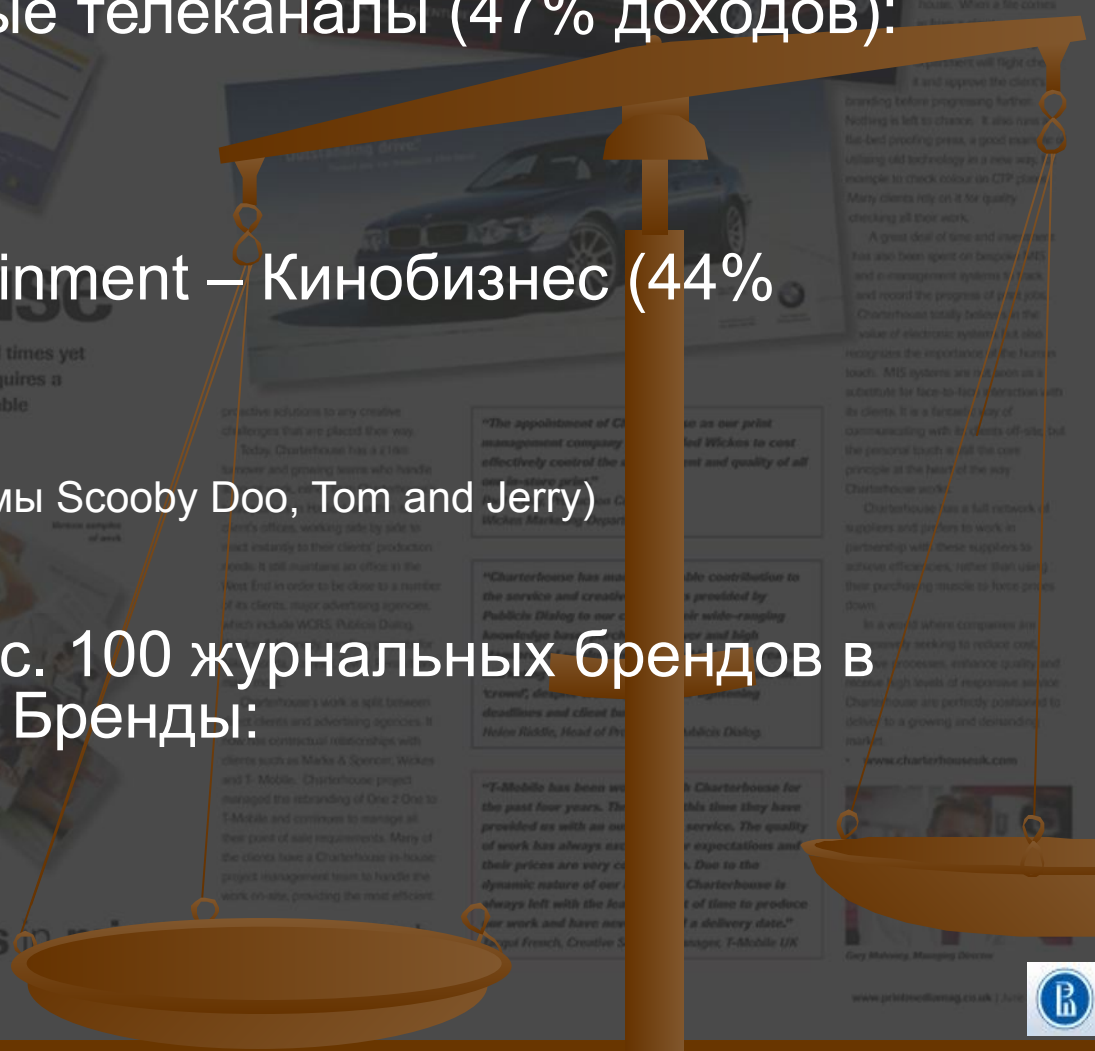
- HBO
- CNN
- Cartoon Network
- Turner Classic Movies

□ Warner Bros. Entertainment – Кинобизнес (44% доходов концерна):

- Warner Bros. pictures
- Warner Home Video
- WB Animation (мультфильмы Scooby Doo, Tom and Jerry)
- WB Consumer products
- New Line Cinema

□ Издательский бизнес. 100 журнальных брендов в мире. 13% доходов. Бренды:

- Time
- People
- Sports Illustrated



News Corporation

- Формировался путем скупки активов медиа в разных странах изначально австралийским магнатом Рупертом Мердоком.
- Распалась на две компании в 2013

Доход 33,4 млрд. долл. (2011)

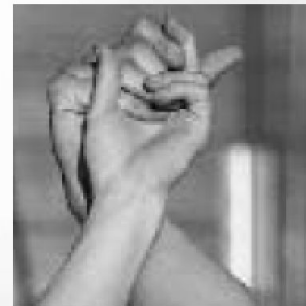
Операционная прибыль 4,85 млрд долл. (2011)



> Informing With A Purpose



> Entertaining With A Passion



> Connecting The World



> Challenging With A Mission



Бизнесы NewsCorp

Печатные медиа (26% доходов)

Газеты Великобритании

- Times
- The Sun
- News of the World

Газеты США

- New York Post
- Wall Street Journal (с 2008)

Газеты Австралии (порядка 60% всей периодики)

- The Australian
- Sidney Daily Telegraph
- Fiji Times

Порядка всего 20 названий

КНИГИ

Charterhouse has developed an enviable reputation for excellence in a demanding sector.

Harper Collins

Кинобизнес. 21% всех доходов. Бренды на базе XX век Фокс:

XX Century Fox

Кабельное телевидение (24% всех доходов)

- Sky
- National Geographic
- STAR

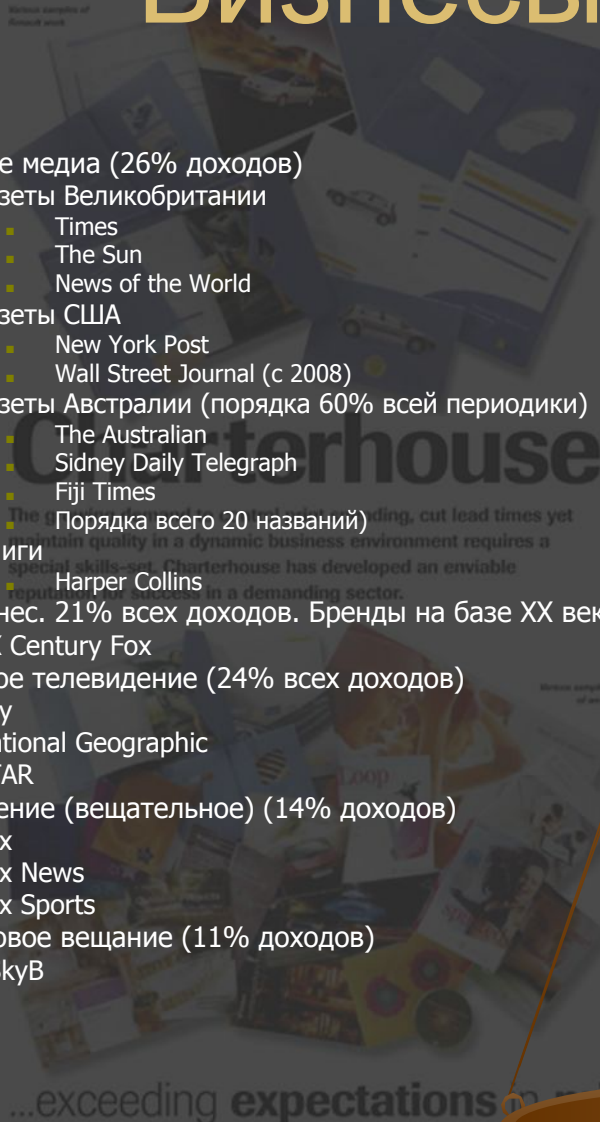
Телевидение (вещательное) (14% доходов)

- Fox
- Fox News
- Fox Sports

Спутниковое вещание (11% доходов)

BSkyB

Charterhouse has grown into a major force at the cutting edge of print management leading the way forward with its clients and initiatives. For many years it has dealt with a long list of blue-chip clients and established a pedigree of print management with the industry. It is now in a position to provide a range of services to its clients, including the management of their print production and distribution, the design and production of their print materials, the management of their print distribution and the management of their print advertising. Charterhouse has a long history of working with the industry's leading brands and is now a leading force in the industry. Charterhouse has a long history of working with the industry's leading brands and is now a leading force in the industry. Charterhouse has a long history of working with the industry's leading brands and is now a leading force in the industry.



Viacom Company

- В 2005 г. из Viacom вышел телевизионный бизнес, образовав отдельную компанию CBS Corp. Во главе с сетью CBS..

Доход 14,19 млрд. долл. (2011)

Операционная прибыль 3,71 млрд долл. (2011)



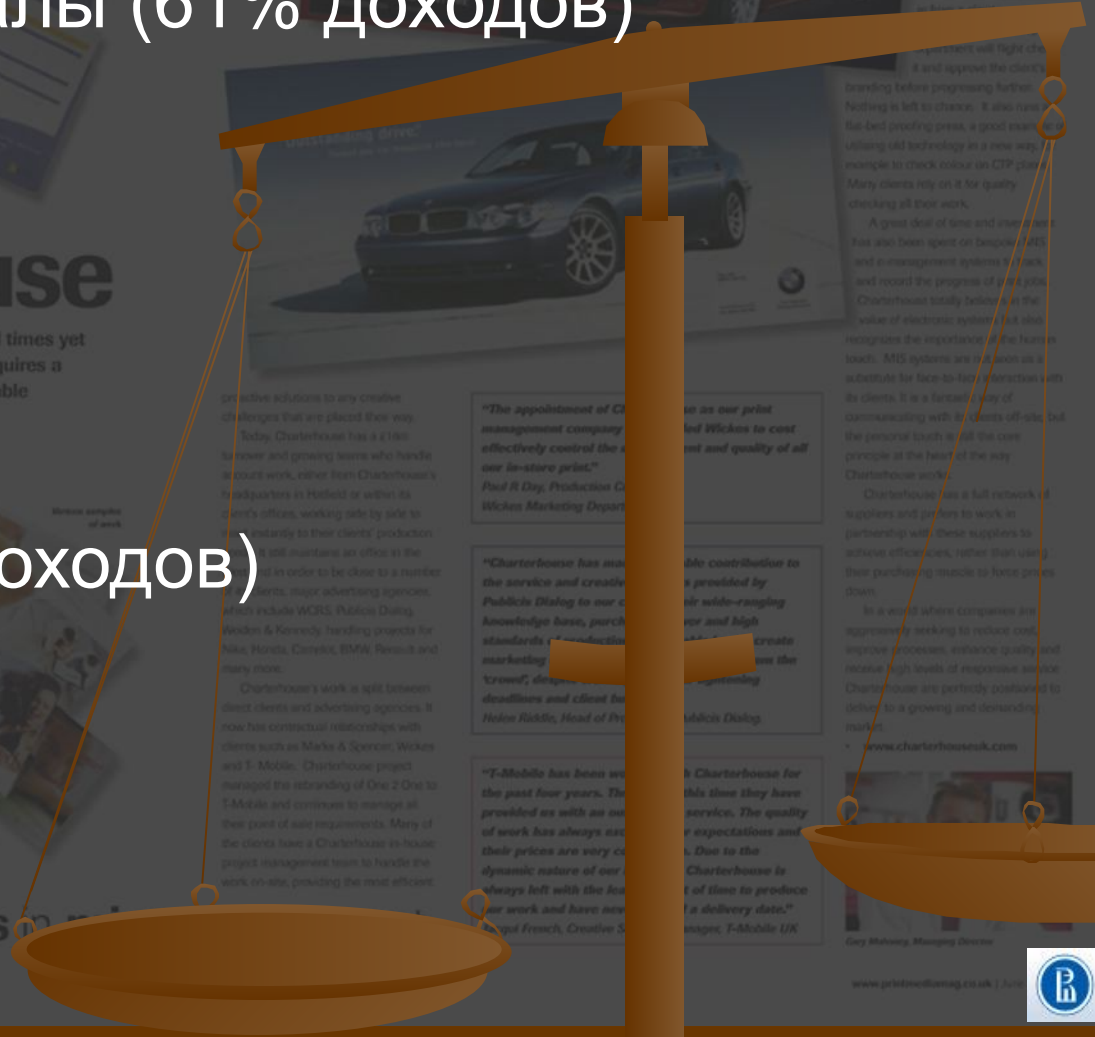
Бизнесы Viacom

■ Кабельные ТВ-каналы (61% доходов)

- MTV
- VH1
- Comedy Central
- Rhapsody
- Nickelodeon
- Virtual Worlds
- Bet Networks

■ Кинобизнес (39% доходов)

- Paramount pictures
- Dreamworks



Charterhouse has grown into a major force at the cutting edge of print management leading the way forward with its ideas and initiatives. For many years it has dealt with a long list of blue-chip clients and established a pedigree of print management services that are highly respected by its clients.

Very first meeting it participated in with its client's creative team. Understanding a client's needs at an early stage Charterhouse can draw on its experience and expertise to provide practical solutions to its clients.

Due to the key to success is the experienced team of print professionals who can provide a service on site to ensure response and guaranteed results. Also, when it comes to print Charterhouse is fully up to date in all areas print production. This means they can advise on the best printer for the job, the right inks for the business and the budget. It also means they can get on with doing what you want while controlling the quality and managing the process to the delivery.

Ten years ago Martin Mahoney recognised that print was changing and print management was becoming an essential part of the business. Charterhouse was set up to meet the needs of his clients and professionals from the print management services. It also acts as a consultant with clients to provide advice on their own activities. Charterhouse adapted to meet the needs of its clients and professionals from the print management services. It also acts as a consultant with clients to provide advice on their own activities. Charterhouse adapted to meet the needs of its clients and professionals from the print management services. It also acts as a consultant with clients to provide advice on their own activities.

Below example of recent work

...exceeding expectations

Charterhouse

to control print spending, cut lead times yet dynamic business environment requires a special skills-set. Charterhouse has developed an enviable reputation in a demanding sector.

Business example of work

Charterhouse will maintain an office in the UK in order to close to a number of clients, major advertising agencies, which include WCRS, Publicis, Ogilvy & Mather, Wieden & Kennedy, handling projects for Nike, Honda, Conoco, BMW, Renault and many more.

Charterhouse's work is split between direct clients and advertising agencies. It now has contractual relationships with clients such as Marks & Spencer, Wicks and T-Mobile. Charterhouse project managed the rebranding of One 2 One to T-Mobile and continues to manage all their point of sale requirements. Many of the clients have a Charterhouse in-house project management team to handle the work on-site, providing the most efficient

NEW MINI SEEKS ATTENTION

THE END.

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A great deal of time and investment has also been spent on bespoke CMS and e-management systems to track and record the progress of a print job. Charterhouse totally believes in the value of electronic systems that also recognise the importance of the human touch. MS systems are in place as a substitute for face-to-face interaction with its clients. It is a large body of communicating with its clients off-site, but the personal touch is still the core principle at the heart of the job. Charterhouse works.

Charterhouse has a full network of suppliers and prefers to work in partnership with them to ensure to achieve efficiencies, rather than using their purchasing muscle to force prices down.

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www.charterhouseuk.com

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"T-Mobile has been with Charterhouse for the past four years. The service provided has always met our expectations and their prices are very competitive. Due to the dynamic nature of our business Charterhouse is always left with the best of work and have never let us down." Gary Mahoney, Managing Director



Walt Disney

■ Создана в результате слияния ABC Corp (крупнейшего телевещателя) и киностудии Walt Disney Pictures в 1996 г.

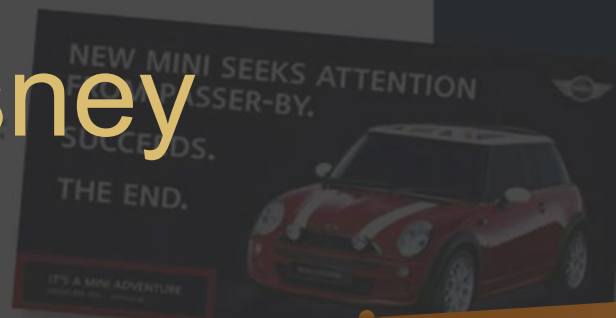
Доход 40,89 млрд. долл. (2011)

Операционная прибыль 8,82 млрд долл. (2011)

Charterhouse

The growing demand to control print spending, cut lead times yet

...exceeding expectations



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"T-Mobile has been with Charterhouse for this time they have provided us with an excellent service. The quality of their work has always exceeded our expectations and their prices are very competitive. Due to the dynamic nature of our business Charterhouse is always left with the freedom to work and have new ideas. Always a pleasure to work with." - Guy Milway, Managing Director

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Бизнес Walt Disney

■ Кинобизнес и музыкальный (16% доходов)

- Walt Disney Pictures
- Pixar animation studios
- Touchstone Pictures
- Hollywood Pictures
- Miramax Films (продана в 2011)
- Walt Disney Records
- Hollywood Records
- Lyric Street Records

■ Телевизионный бизнес (46% доходов)

- ABC Network
- ABC news
- Disney Channels
- Disney Network
- ESPN

■ Парки развлечений (11 шт.) (29%)

■ Потребительские товары – игрушки (7%)

Bertelsmann

■ Единственный семейный концерн, оставшийся таковым. Единственный неамериканский концерн в списке.

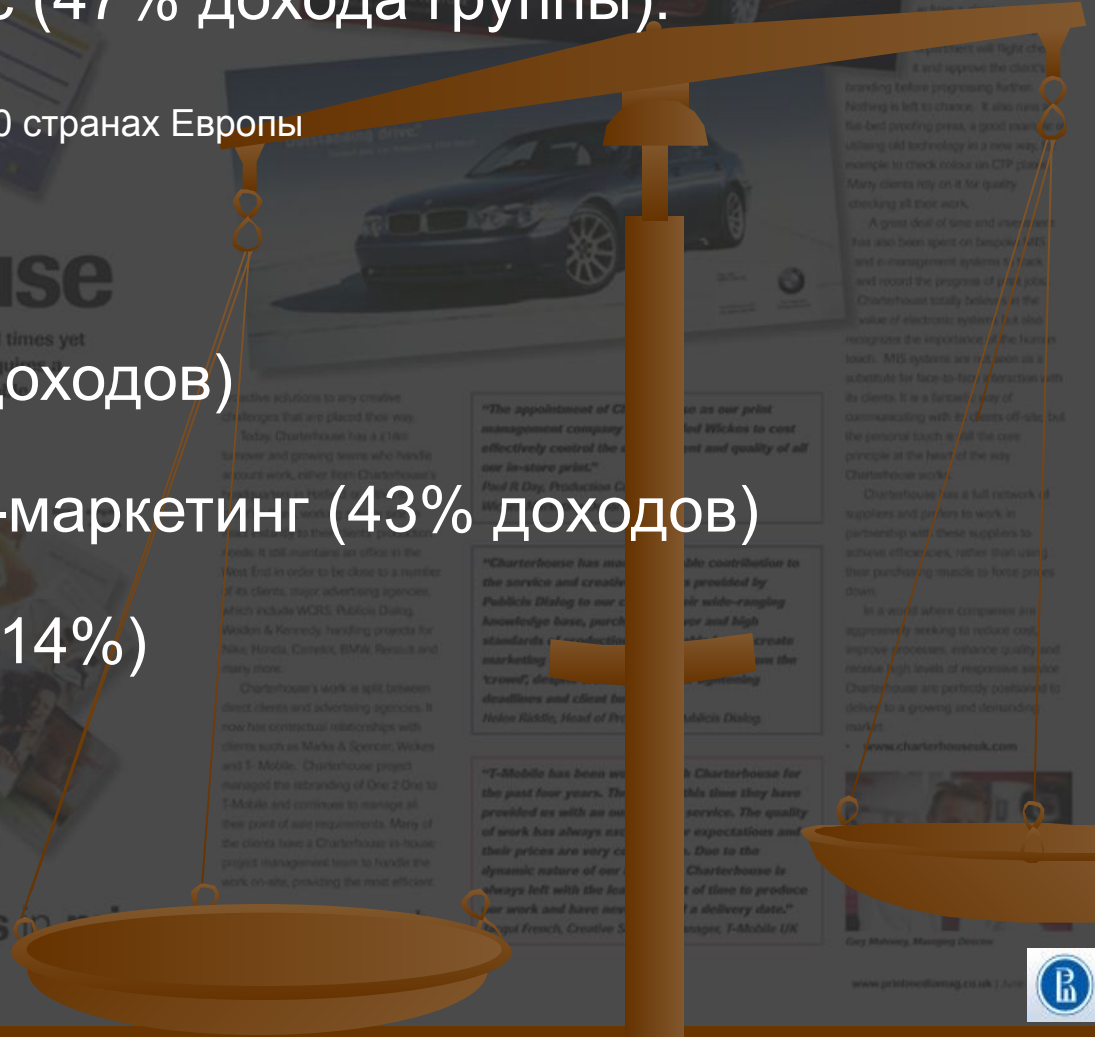
Доход 12,3 млрд. евро. (2011)

Операционная прибыль 1,443 млрд евро. (2011)



Бизнесы Bertelsmann

- Телевизионный бизнес (47% дохода группы):
 - RTL-Group
 - Канал RTL, RTL+ в Германии и 10 странах Европы
 - Канал M6 во Франции
 - 30% Рен-ТВ
 - Радио RTL
 - Fremantle Media
- Печатные СМИ (19% доходов)
 - Gruner + Jahr (500 изданий)
- Дистрибуция и директ-маркетинг (43% доходов)
 - Arvato
- Издательский бизнес (14%)
 - ИД Random House



Крупнейший сегмент мировой экономики на финансовых рынках

- Конгломераты культурной и коммуникационной индустрий занимают первые места по рыночной (биржевой) капитализации.
- Абсолютно специфическое положение Майкрософт. Он на первом месте в списке, хотя не производит материальные составляющие. На втором месте производитель оборудования Cisco с капитализацией в два раза ниже, занимая уже 24 место по капитализации.
- Высокая спекулятивная составляющая.
- Повышенный price earning ratio (отношение стоимости акций и дивидендов). У Майкрософта 24 (у Газпрома такой же).

Классификация по обороту

- Мы видим, что по обороту компании культурных и коммуникационных индустрий существенно ниже собственной капитализации (спекулятивная составляющая – компании переоценены).
- Оборот Майкрософт составляет 42 млрд. долларов (139 место), однако его капитализация составляет 232 млрд. долларов (3 место).
- Причина – высокое соотношение прибыль/оборот (у Майкрософта 28%). У компаний из нефтяной отрасли, например, оно существенно ниже (10-15%)

Индустрии содержания

- Индустрии содержания (медиа и культуры) в списке по оборотам занимает отнюдь не первое место.
- Список компаний индустрий содержания, расположенных на 200-500 местах по обороту:

Название

Charterhouse

The growing demand to control print spend whilst yet maintain quality in a dynamic business environment requires a special skills-set. Charterhouse has developed an enviable reputation for success in a demanding sector.

Оборот

Место

Comcast

25,7

260

News Corp

25,3

266

Vivendi

25,7

270

Bertelsmann

24,2

281

Lagardere

18,1

396

...exceeding expectations



Финансирование процессов поглощения

- Происходило преимущественно из средств, привлеченных на финансовых рынках.
- Финансовые полюсы поддерживали менеджеров культурных индустрий в этих сделках с целью получить краткосрочные спекулятивные выигрыши.
- В большинстве случаев процессы поглощения не приводили к изменению операционных показателей эффективности. В первую очередь – чисто финансовый заработок.
 - Vivendi и Universal
 - Time Warner и AOL
 - Walt Disney и ABC
 - В России - РБК

Спиралевидная логика

- Чаще всего слияние двух коммуникационных и медиакомпаний приводит к тому, что курс акций получившегося образования становится выше, чем каждой из компаний по отдельности. Это способствует все новым и новым сделкам. Курс акций ABC до слияния с Walt Disney составлял 17 долларов. После — 124 доллара.
- Разделение ролей между менеджерами и агентами финансового сектора: растворение и размывание капитала на руку менеджменту, а финансисты в выигрыше за счет роста курса акций.

Кумулятивная логика

- Чем больше индустриальные агенты вовлечены в стратегии внешнего роста и финансовые рынки, тем больше вырастают их финансовые аппетиты, что в свою очередь приводит к их оцениванию и рейтингованию ведущими рейтинговыми агентствами как «финансово привлекательных»
- Финансовая привлекательность оценивается по комплексу показателей, но важно понимать, что из-за массового несоблюдения в этой сфере законов конкуренции и олигополистического положения компаний, сложности процедуры экономического анализа и двойных интересов (бизнеса и властных) эти индустрии становятся излюбленным объектом для спекуляций.

Слияния зачастую не приносят ощутимых индустриальных результатов

- В результате слияния AOL и Time Warner обещанной синергии так и не было достигнуто. Организационные проблемы – невозможность объединить управление и слишком разные интересы.
- Риски финансовых расходов и потерь на сделки (в 2003 Viacom потратила на сделку с CBS 776 миллионов долларов, т.е. 21,4% операционного дохода).
- Большие финансовые риски могут сильно пошатнуть операционные показатели. В 2002 после того, как пузырь высокотехнологичных компаний рухнул, потери AOL-Time Warner составили 100 млрд. долл. (два годовых оборота компании). Необходимость вливаний. Возможные риски маржин-коллов.

Понятие контроля (как формы собственности)

- Менеджеральный контроль – капитал распылен среди большого количества акционеров так, что ни один из них в одиночку влиять на управление. В этой ситуации на состав совета директоров и на операционное управление влияют в первую очередь менеджеры корпорации.
- Семейный контроль – один человек или семья владеет большим пакетом контролирующих акций.
- Публичный или общественный контроль – капитал в основном принадлежит государству или общественному институту.
- Контроль на основе взаимопомощи – контролирующий пакет принадлежит фонду или «трасту», у которого нет коммерческих интересов.

Способы финансирования операций роста

- ✦ Выделяют три основных способа финансирования операций роста:
 - ✦ Операции над капиталом (эмиссия акций или обмен акциями).
 - ✦ Заемные средства (привлеченные либо в виде банковских кредитов, либо облигаций, выпускаемых на финансовые рынки).
 - ✦ Самофинансирование
- ✦ Эти три способа финансирования более ли менее соответствуют типам контроля. Группы с общественным или семейным контролем не имеют тех же возможностей внешнего роста, что группы с менеджеральным контролем: последние могут более просто производить допэмиссии акций, тогда как группы с семейным контролем, если хотят сохранить контрольный пакет у главных собственников, ограничены в масштабах таких операций.
- ✦ Высокая спекулятивная составляющая и интерес к индустриям медиа, культуры и коммуникаций на финансовых рынках приводят к предпочтению менеджерального контроля.



Контроль со стороны финансовых полюсов

- Преобладание финансовой логики над индустриальной приводит к тому, что агенты финансовой сферы становятся настоящими хозяевами индустрий культуры и медиа:
- За счет высоких долговых обязательств последних
- За счет того, что становятся мотором роста денежного потока cash flow
- Влияние на управление компаниями
- За счет того, что от них зависит внешний рост
- За счет стирания финансовых границ (на мировых финансовых рынках средств больше, чем в национальных индустриях).

Олигополия за счет рыночной власти

- Усиление сближения компаний за счет финансовой логики приводит к возникновению конгломератов и рост олигопольной собственности, играющей против правил конкуренции.
- Полюсы получают преференции и выгоды, которые правильнее было бы назвать «рыночная власть».
- Теория 5 сил Майкла Портера.



Что окружает любую компанию? Конкурентные силы Майкла Портера



Изменение логики: от логики конгломератов к логике «фильер» (направлений)

- На протяжении 1990-х гг. мы наблюдали стратегию беспорядочной диверсификации в разные сегменты контента при артикулировании данных стратегий со стратегиями крупных телекоммуникационных компаний и производителей оборудования (Sony, AOL TW, Vivendi Universal).
- В начале 2000-х мы наблюдаем процесс «чистки периметра» - конгломераты избавляются от многих активов.

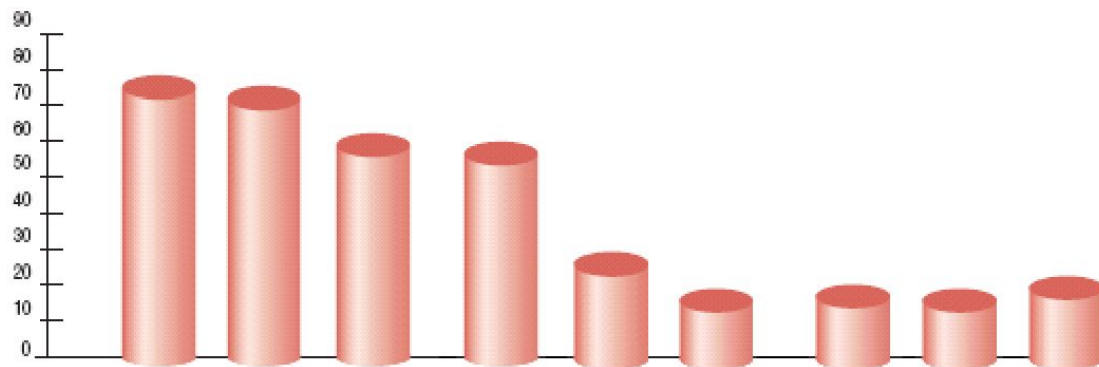
■ Продажа активов как финансовый способ получить ликвидность для погашения долгов с тем, чтобы сократить задолженность и получить «хороший рейтинг», чем привлечь новых инвесторов.

■ Однако в первую очередь задача такой логики – рационализация позиционирования корпораций с целью сократить количество сфер деятельности. Полюсы выбирают оптимальные стратегические пути.



Пример Вивенди

- Первичный курс – на беспорядочные поглощения медиа и коммуникационных компаний.
- Периметр: платное ТВ (оператор), платное ТВ (производитель), экология и водоснабжение, кино, звукозапись, издательский бизнес, интернет-компании.
- Существенное падение курса акций.

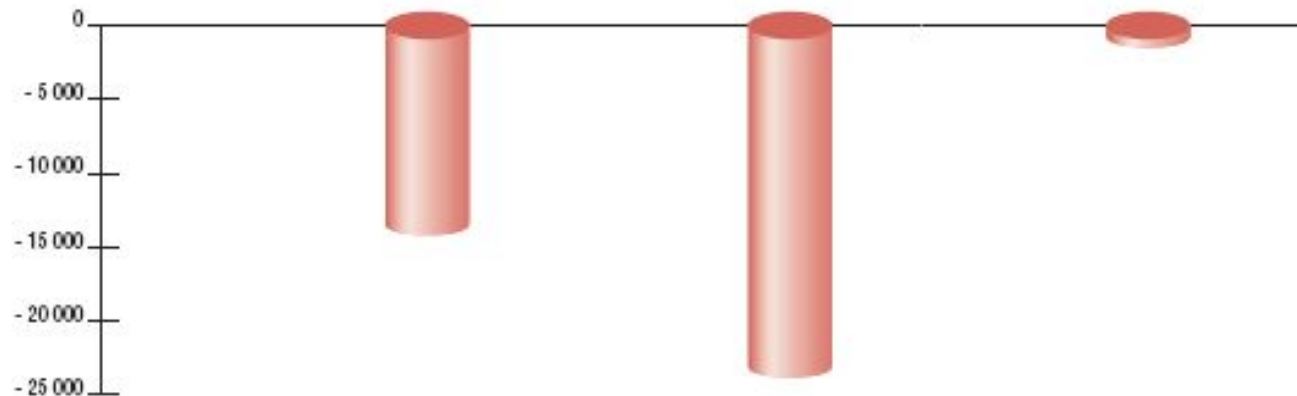


	2001			2002			2003		
	январь	июнь	декаб	январь	июнь	декаб	январь	июнь	декаб
Курс акций долл. США	75,04	70,65	58,71	55,83	27,27	15,70	16,68	16,29	19,08



Пример Вивенди

- Высокий корпоративный долг (около 35 млрд. долл.), низкая прибыль. Рекорд по потерям.
- Чистка периметра



	2001	2002	2003
Чистая прибыль (млн. евро)	(13 597)	(23 301)	(1 143)



Сосуществование



- Диверсифицированные конгломераты сосуществуют с компаниями, действующими в одной сфере и всего на нескольких, но наиболее привлекательных рынках.
- Диверсифицированные компании существуют (гипотеза Миеге) в тех странах, где очень широкий национальный рынок (США), и они же работают на зарубежную аудиторию. Однако в небольших странах на их место приходят компании мононаправленные.

Смена стратегии – крах мультимедиа?

- Мультимедиа тизация объясняла диверсификацию. Однако в реальности мы видим постепенное фокусирование компаний на определенных направлениях.
- Существенное сокращение активов AOL TW и Vivendi
- Разделение Viacom в 2005
- Уход Диснея из Интернета
- NBC Universal – акцент на аудиовизуальный бизнес
- Разделение News Corporation на две компании



Корпоративный периметр 2002

	Broadcasting	Audiovisual production	Movie	Periodical press	Book sector	Music	Cable-satellite e-mobile	Internet-aggregation
Production		 	 			 		
Package	 			  	 	  	  	
Distribution	  			  		  	  	

Production

Package

Distribution














Корпоративный периметр 2015

	Broadcasting	Audiovisual production	Movie	Periodical press	Book sector	Music	Cable-satellite e-mobile	Internet-aggregation
Production	21ST CENTURY FOX	21ST CENTURY FOX	21ST CENTURY FOX					
Package	21ST CENTURY FOX			News Corp	News Corp media worldwide	vivendi Walt Disney	21ST CENTURY FOX BERTELSMANN media worldwide	
Distribution	21ST CENTURY FOX			News Corp	News Corp media worldwide	vivendi	21ST CENTURY FOX	vivendi News Corp



Российские медиагруппы (2008)

Вещание	Аудиовизуальное производство	Кино	Периодика	Книгоиздание	Музыка	Кабельное/спутниковое	Телекоммуникации/мобильная связь	Интернет-агрегация
								
								
								

branding projects with a fine reputation for the technical side of printing. Above all they can provide

...exceeding expectations

designs left with the best for work and have new ideas for French, Creative S

of time to produce a delivery date." T-Mobile UK

Gay Miley, Managing Director



Российские медиагруппы (2011)

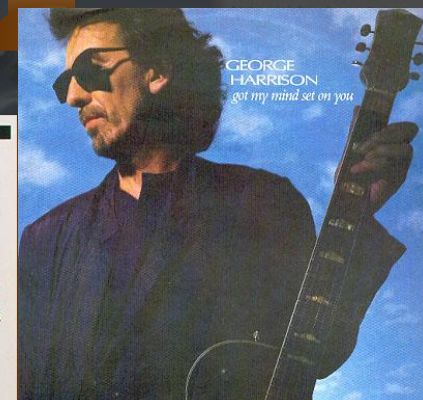
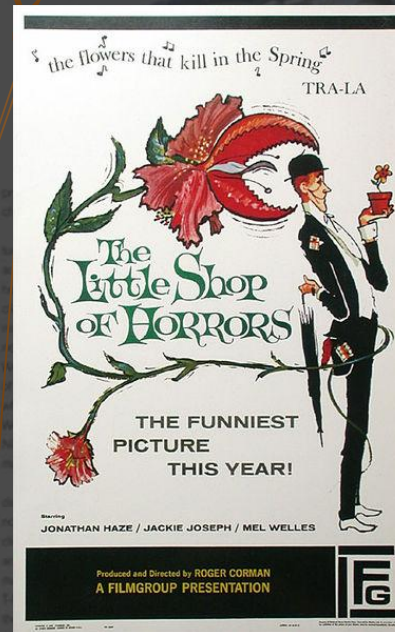
Вещание	Аудиовизуальное производство	Кино	Периодика	Книгоиздание	Музыка	Кабельно/спутниковое	Телекоммуникации/мобильная связь	Интернет-агрегация

Как создавались промышленные капиталы медиа

- Историческое происхождение менеджеров: в массе своей – журналисты.
- В начале 1990-х не было рекламного рынка, поэтому СМИ продолжали материально зависеть от государства.
- Зарубежная «гуманитарная помощь» - совместные проекты с иностранцами.

Иностранная поддержка

- 2x2 и Superchannel (клипы)
- ТВ6 и Turner Broadcasting (кино, классика Голливуда и выпуски Си-Эн-Эн)



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...exceeding expectations



Индустриальные капиталы

■ Три причины:

- «Похудевший» государственный бюджет в начале 90-х и галопирующая инфляция привели к финансовым трудностям СМИ, которые продолжали по старой памяти финансироваться из госбюджета.
- К 1994 сформировался финансово-промышленный капитал, близкий власти (в основном – на первой волне приватизации)
- В 1994-1995 г. в СМИ появляется резко негативная оценка действий центральной власти (из-за войны в Чечне и экономических трудностей). Политические условия очень негативные: в Думе коммунисты и ЛДПР, выступления региональных лидеров. Администрации Ельцина было выгодно передать СМИ в руки крупного капитала, близкого власти.

Первые медиаолигархи

- В 1993 Гусинский и его банк «Мост-банк» открывает свою газету «Сегодня» (гл. редактор – М. Бергер). Тесная связь со структурами мэрии г. Москвы («Мост-банк» - привилегированный банк прав-ва Москвы). Операция «Мордой в снег».

- Гусинский писал, что газета обходилась в 6 млн. долл. в год, а поскольку это хобби, он не собирался назначать во главе газеты хорошего менеджера, чтобы не «расходовать менеджеров» на проект, который по определению хобби.

Когда я открывал газету, откровенно говоря, она была ничем другим, кроме как инструментом влияния, на 100% инструментом влияния на чиновников и общество. Я основал газету специально для этих целей. Если чиновник выходил за рамки, я мог бороться с ним при помощи газеты, например сообщить, что он просил деньги... (Цитата Гусинского Д. Хоффману).



Березовский

- Конкуренция с Гусинским за счет принадлежности к противостоящей Лужкову группе (использование Коржакова).
- Прямое коммерческое участие в медиа: «Логоваз» был одним из акционеров ООО «Реклама-холдинг» (первый селлер канала «Останкино»).
- Идея сосредоточения продаж в одних руках (монополизация продаж – прием, отработанный с «Автовазом»).



Захват ОРТ

- В 1994 Березовского знакомит с Ельциным Валентин Юмашев (муж дочери президента). История с изданием книги Ельцина.
- Изначально Березовский, убеждая Ельцина приватизировать частично канал «Останкино», использовал аргумент, что до выборов осталось менее 2 лет, и необходимо орудие пропаганды.
- Березовский хотя и признавался, что преследовал в краткосрочной перспективе только политический интерес, рассчитывая на долгосрочный коммерческий, в 2001 году после продажи акций «1 канала» утверждал, что продал канал до того, как «он начал приносить доход».

Приватизация ОРТ и создание империи

- 45% в прямой собственности госкомимущества
- 6% - у ИТАР-ТАССа и ТТЦ. Директор ТАСС Игнатенко – соратник Березовского.
- 29 ноября 1994 г. Ельцин подписывает указ 2133 о создании ОРТ, по сути предполагавший без какого-либо конкурса приватизацию первого государственного телеканала по заранее утвержденной схеме.
- Покупка «Огонька» и «Независимой газеты»



Следствие приватизации

- Первый этап приватизации (ваучерная) не принес инвестиционных результатов.
- Второй этап приватизации – залоговые аукционы - совпал по времени с выборами Б.Н. Ельцина (1995-1997).
- У государства не было наличных «живых» денег. Они в свою очередь находились в руках крупных банков («Менатеп» и «Мост» обслуживал счета Московского правительства, «Онэксим» - международные валютные операции). Идея заключалась в том, что государство брало у банков кредит под залог акций государственных предприятий. По сути размер кредита был таким, что ни о каком возврате средств не могло идти речи. То есть – сознательная схема уступки собственности.

Charterhouse has grown into a major force at the cutting edge of post management leading the way forward with its clients and initiatives. For many years it has dealt with a long list of blue-chip clients and maintained a pedigree of post management with the aim to consistently exceed its clients' expectations. Its aim is to lighten its clients' workload and reduce their cost. From the very first meeting it participates fully with its client's creative team. By understanding a client's objectives at an early stage Charterhouse can draw on its experience and expertise to find the most cost-effective solution to meet their needs. One of the keys to Charterhouse's success is the experienced team of post professionals who can provide a personal service on-site to ensuring a quick response and guaranteed results. Anywhere it comes to post, Charterhouse is totally reliable, working with its clients' press capacity of 40,000. This means they can select the right partner for the job, the right specialist for the business and the right cost for the budget. It also means that Charterhouse can get on with doing what it is good at, controlling the quality of the output and managing the process from reception to the delivery.

Two years ago Managing Director, Guy Marney, recognised that the market for post was changing and post management had emerged as the way forward. While in the early 1980s many companies were cutting back on their print buying departments to concentrate on their core activities, Charterhouse stepped in to meet the needs for quality advice and professional guidance. Apart from the post management services, it also acts as a consultant to companies with needs for post related products. One of the company's major strengths is that across all of its accounts teams have a very strong print manufacturing background and are all very aware of the strengths and weaknesses of each of the processes. They handle a huge variety of projects, including above-the-line advertising work, point of sale, direct mail, cardboard engineering and re-branding projects with a fine appreciation for the technical skills of printing. Above all they can provide

...exceeding expectations



Модель

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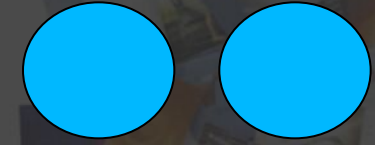
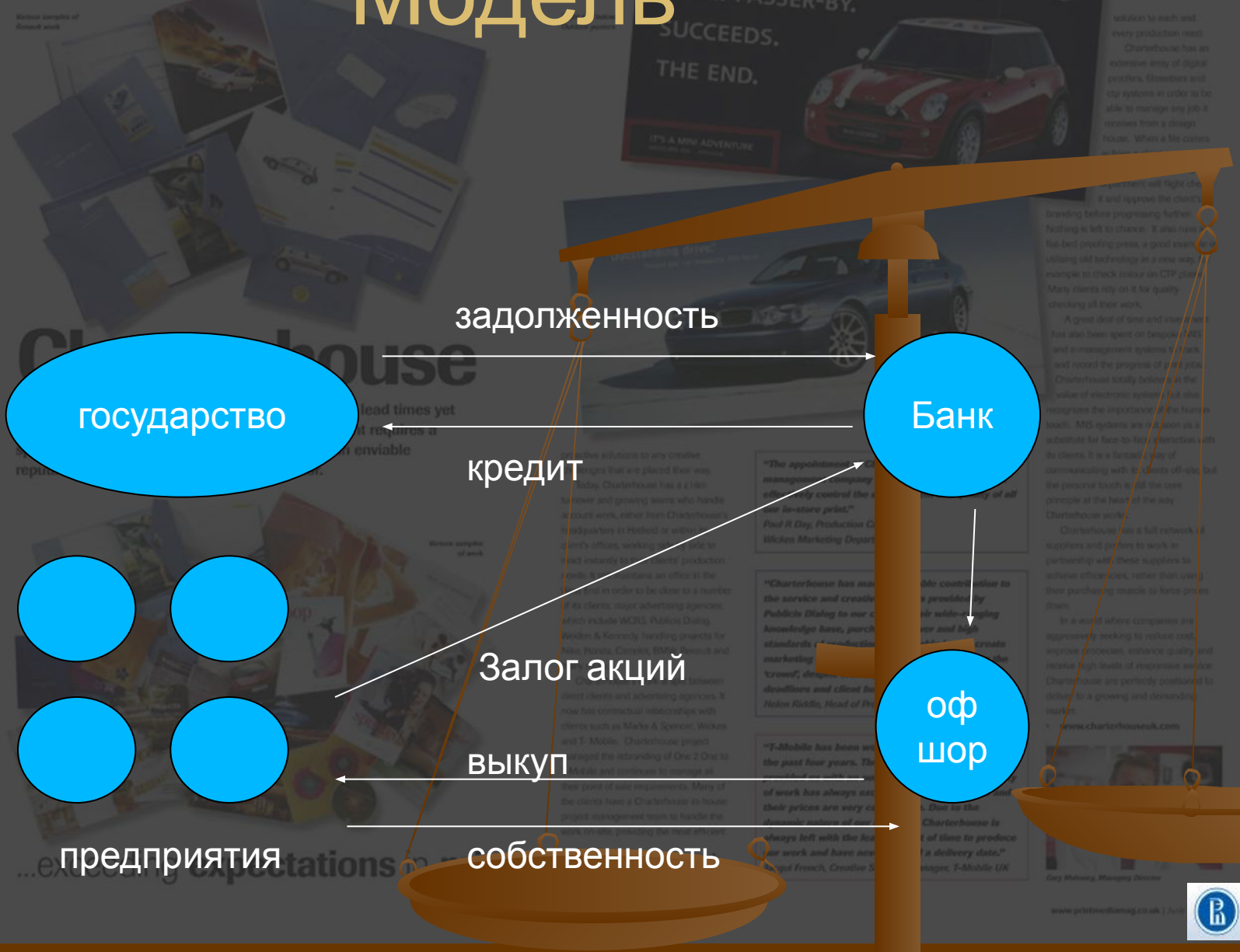
Its aim is to lighten its clients' workload and reduce their cost. From the very first meeting it participates fully with its client's creative team. By understanding a client's objectives at an early stage Charterhouse can draw on its experience and expertise to develop the practical solutions to meet their needs.

One of the keys to Charterhouse's success is the experienced team of print professionals who can provide a personal service on-site to ensuring a quick response and guaranteed results. And yet when it comes to print buying Charterhouse is totally independent, with no in-house press capacity of its own.

This means they can select the right partner for the job, the right specialist that fits the timescales and the right cost for the budget. It also means that Charterhouse can get on with doing what it is good at, controlling the quality of the colour, and managing the process from reception to the delivery.

Ten years ago Managing director, Gary Mahony, recognised that the market for print was changing and print management had emerged as the way forward. While in the early 1990s many companies were cutting back on their print buying departments to concentrate on their core activities, Charterhouse stepped in to meet the needs for quality advice and professional guidance. Apart from the print management services, it also acts as a consultant to companies with needs for print related products.

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предприятия

задолженность

кредит

Залог акций

выкуп

собственность

Банк

офшор



Начало залоговых схем

- 30 марта 1995 г. Потанин, Ходарковский и Смоленский предлагают схему правительству в обмен на кредит 1,8 млрд. долл.
- 30 августа 1995 г. Ельцин визирует указ о залоговых аукционах.
- Победители были известны заранее. Власть прекрасно была осведомлена о схеме. Для нее это был способ избавиться от «красных директоров» и обменять собственность на собственность близких олигархов.
- Система двух ключей: доступ к собственности (до выборов) и возможность сохранить собственность (после выборов). Автор — Чубайс.



Создание новой элиты

■ По сути этап залоговых аукционов можно назвать периодом создания новых элит, когда государство создает сверху новую политико-олигархическую элиту.

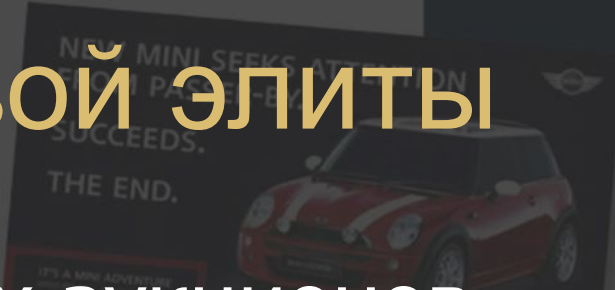
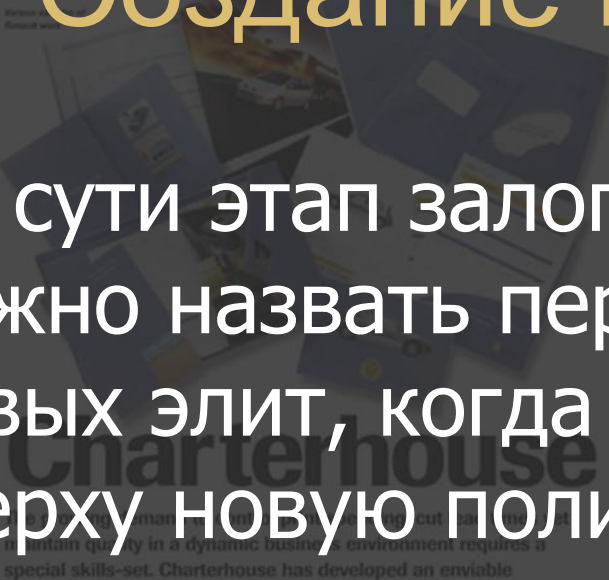
■ «Буржуазная бюрократия» (Нуреев), в которой успех в бизнесе напрямую связан с позицией во власти.

Charterhouse has grown into a major force at the cutting edge of print management leading the way forward with its ideas and initiatives. For many years it has dealt with a long list of blue-chip clients and established a pedigree of print management with the aim to constantly exceed its clients' demands. It is an aim to lighten the workload of its clients and to save them the very best of its people to its client's creative team. By understanding a client's objectives at an early stage Charterhouse's experience and expertise can provide practical solutions to its clients.

Due to the key to Charterhouse's success is the experienced team of print professionals who can provide a service to its clients as a team response and guarantee when it comes to print. Charterhouse is totally independent, with no in-house press capacity. This means they can act as a partner for the client, the business and the budget. It also means that Charterhouse can get on with doing what is good at, controlling the quality of managing the process from the delivery.

Ten years ago Managing Director, Gary Mahoney, recognised that the market for print was changing and print management had emerged as a new business. When the client's print buying departments to research on their own activities, Charterhouse stepped in to meet the needs of clients and professionals from the print management also acts as a consultant with needs for print related products.

Due to the company's major objective is that across all of the services they have a very strong print background and are an strength and weaknesses of each of the processes. They handle a huge variety of projects, including above-the-line advertising work, point of sale, direct mail, cardboard engineering and in-plant projects with a fine appreciation for the technical side of printing. Above all they can provide



solution to each and every production need. Charterhouse has an extensive array of digital printers, flexos and top systems to make us able to manage any job it comes from. When a file comes in, we will light it up and approve the client's printing before progressing further. Nothing is left to chance. It also means that creating press is a good example to check out on CTP plan. Many clients rely on it for quality management of their work.

It is a key to Charterhouse's success is the experienced team of print professionals who can provide a service to its clients as a team response and guarantee when it comes to print. Charterhouse is totally independent, with no in-house press capacity. This means they can act as a partner for the client, the business and the budget. It also means that Charterhouse can get on with doing what is good at, controlling the quality of managing the process from the delivery.

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"The appointment of Charterhouse as our print management company has enabled Wicks to cost effectively control the print process and quality of all our in-store print."

Red It Day, Production Group, Wicks Marketing Department

Knowledge base, particularly in the area of print management, has been a key to Charterhouse's success for many years. The provided us with an excellent service, exceeding our expectations and their prices are very competitive. Due to the dynamic nature of our business, we are always left with the feeling that we have new ideas and have new ideas.

Charterhouse has a full network of suppliers and partners to work in partnership with. It is a key to Charterhouse's success is the experienced team of print professionals who can provide a service to its clients as a team response and guarantee when it comes to print. Charterhouse is totally independent, with no in-house press capacity. This means they can act as a partner for the client, the business and the budget. It also means that Charterhouse can get on with doing what is good at, controlling the quality of managing the process from the delivery.

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Политическая мобилизация

- Во время визита в 1996 в Давос Березовский и Гусинский договорились о временном перемирии для того, чтобы не дать коммунистам прийти к власти.
- Давосский «пакт»: Березовский, Гусинский, Ходорковский, Потанин, Виноградов (Инком), Смоленский и Фридман.
- «Центр защиты частной собственности» во главе с Чубайсом (по сути – идеологическая организация для выборов). Олигархи идут на прием к Ельцину.

«Борис Николаевич, то, что происходит в вашем предвыборном штабе во главе с Сосковцом, в вашем окружении, - это уже почти крах. Именно эта ситуация заставляет одних бизнесменов идти договариваться с коммунистами, других - упаковывать чемоданы. Нам договариваться не с кем. Нас коммунисты на столбах повесят. Если сейчас кардинально не переломить ситуацию, через месяц будет поздно»

Ельцин Б.Н., «Президентский марафон».



Система пропаганды

- Игорь Малашенко был информационным идеологом штаба.
- Мобилизация всех информационных ресурсов.
- Гусинский будет жалеть о такой ангажированности: «Мы сами у себя вызвали истерику. Мы все решили вдруг, что наша миссия — не допустить коммунистов к власти» (Хоффман).



...exceeding expectations



Раздача «подарков»

- Гусинский получает весь эфир на 4 канале (по сути, росчерком пера, Б.Н. Ельцин закрыл вещание канала ради другого канала – без всяких конкурсов).
- Березовский получает пост секретаря Совета Безопасности.
- Потанин будет назначен вице-премьером и примет участие в аукционе «Связьинвеста».
- Государство поддержит СМИ в период кризиса:
 - Кредит Газпрома НТВ
 - Кредит ВЭБа ОРТ



Разрастание империй

- Березовский купит «Коммерсантъ» и ТВ-6.
- Потанин – «Эксперт» и «Комсомольскую правду», «Известия» и радиостанции.
- Гусинский в 1995 купил «Эхо Москвы», позднее – «НТВ+» и ТНТ.
- ВИ, занимавшееся имиджем Ельцина в период кампании, также получает свои преференции: контракты с ОРТ и РТР. Позднее – назначение Лесина во главе Минпечати.

Создание полюсов

- Полюс Юрия Лужкова: приватизация МГТС и передача в руки старинного друга Лужкова В. Евтушенкова. Создание АФК «Система», запуск МТС. Телеканалы ТВЦ и НТВ обеспечивали поддержку партии «Отечество-Вся Россия» и ее ставленникам – Лужкову и Примакову.
- Полюс партии «Единство»: «Коммерсант», ОРТ, «Огонек», «Независимая газета», ТВ-6 – Березовский.
- Идиотизм ситуации в том, что после изгнания и Березовского и Гусинского обе партии сольются в одну «ЕР».



Структурная логика

- Олигархи возникли при непосредственном участии государства путем выдачи им государственной собственности. В определенный момент государство почувствовало легитимность забрать ее обратно (я дал – я отниму).
- Собственность не была следствием борьбы за нее, а привилегией.
- Медiasобственность подчинялась той же логике. Она не была следствием повышения экономической эффективности и выживания в условиях рынка.
- Отличие от государств Центральной Европы: к аукционам допускались иностранные собственники, пресса не получила ни копейки (ни злого) помощи от государства. В результате неэффективные редакции обанкротились и закрылись, либо были проданы с молотка более эффективным хозяевам.

Захват НТВ

- Весной 2000 В. Гусинский попадает на несколько дней в тюрьму якобы за махинации компании «Русское видео»
- После освобождения уезжает в Испанию и публикует «секретный 5 протокол», который его вынудили подписать в обмен на свободу. По протоколу он за 300 млн. долл. продавал акции НТВ и «Моста» Газпрому.
- Газпром уже потребовал наложить арест на акции «Моста» в обеспечение кредита.
- Прокуратура возбуждает снова дела против Гусинского за «вывод активов» и арестовывает активы «Медиамоста». Газпром в свою очередь требует изъятия другой части акции как гарантии за то, что обеспечивающие кредит акции будут возвращены. У Газпрома получается контрольный пакет, и он меняет менеджмент.

Захват НТВ

■ Гусинского дважды арестовывали (в Греции и Испании), дважды его отказывались экстрадировать. В 2004 Страсбургский суд признал Россию виновной в незаконном аресте и давлении на Гусинского.

■ Новым председателем совета директоров НТВ стал А.Р. Кох, а гендиректором – инвестбанкир Борис Иордан.

■ Уход редакционного коллектива во главе с Е.А. Киселевым на ТНТ, затем – на ТВ-6, где его приютил уже находящийся в изгнании Березовский.

■ Перекупка кадров («предательства», «открытые письма» и т.д.)



НТВ.RU

Charterhouse has grown into a major force at the cutting edge of print management leading the way forward with its clients and employees. For many years it has built up a strong list of client relationships and established a pedigree of successful management with the aim to consistently exceed client expectations. Its aim is to lighten its clients' workload and reduce their cost. From a very first meeting it participates fully in its client's creative team. By understanding a client's objectives of every stage Charterhouse can draw on its experience and expertise to develop the most suitable to meet their needs.

One of the keys to Charterhouse's success is the experienced team of print professionals who can provide a personal service on-site to ensuring a quick response and guaranteed results. Also when it comes to print, Charterhouse is a fully integrated service. It has an in-house press capacity of its own. This means they can select the right partner for the job, the right specialist for the business and the right cost for budget. It also means that Charterhouse can get on with doing what it's good at: controlling the quality of the colour, managing the process from reception to the delivery.

Ten years ago Managing Director, Matthew, recognised that the print world was changing and print management had emerged as the way forward. While in the early 1990s many companies were cutting back on their print buying departments to concentrate on their core activities, Charterhouse decided to meet the needs for quality advice and professional guidance. Apart from the print management services, it also acts as a consultant to companies with needs for print related products.

One of the company's strengths is that across all of the activities there is a very strong print manufacturing background and are all very aware of strengths and weaknesses of each of the processes. They handle a huge variety of projects, including above-the-line advertising work, point of sale, brand re-imagining, cardboard engineering and re-branding projects with a first appreciation for the technical side of printing. Above all they are proud

...exceeding expectations

Конец эпохи «эффективных собственников»

- После теракта на Дубровке Б. Йордан покинет свой пост гендиректора телекомпании НТВ и Газпром-медиа.
- Причина в том, что изначально Йордану была обещана возможность выкупить компанию, в 2002 г. об этом обещании забыли. А освещение теракта вызвало в Кремле бурю критики.
- На место Йордана пришел Н. Сенкевич. Первое решение – закрытие программы «Намедни» за интервью со вдовой Зелимхана Яндарбиева Маликой. Парфенов выступит с открытым письмом с описанием акта цензуры, его уволят за нарушение этики.
- Позднее – Сенкевич отправится на повышение, а гендиректором станет В. Кулистиков.

Захват ТВ-6 и создание ТВС

- После «добивания» НТВ принимаются за ТВ-6. Сценарий тот же: миноритарный акционер «Лукойл-Гарант» подает иск в суд о ликвидации компании в связи с тем, что «корпорация вела свою хозяйственную деятельность с многочисленными нарушениями. Телекомпания "ТВ-6 Москва" в последние годы является убыточным предприятием, "несмотря на достаточные материально-техническую и информационную базу деятельности, наличие профессионального коллектива журналистов, а также поддержку акционеров».
- Создание ТВС (реакция на фразу Путина о талантливом коллективе журналистов): колхоз олигархов: Бендукидзе, Чубайс, Абрамович, Киселев, Мамут, Дерипаска.

1998

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Recent examples of Award work



Березовский

49%

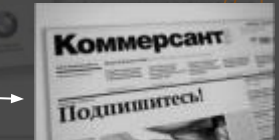
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Государство



Gary Mahoney, Managing Director

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2012



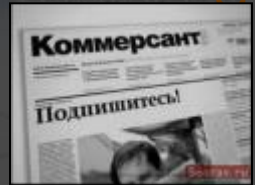
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Государство



Усманов



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The growing demand to control print spending, cut lead times yet maintain quality in a dynamic business environment requires a special skills-set. Charterhouse has developed an enviable reputation in the demanding sector.

2 офшора

...exceeding exper



1998

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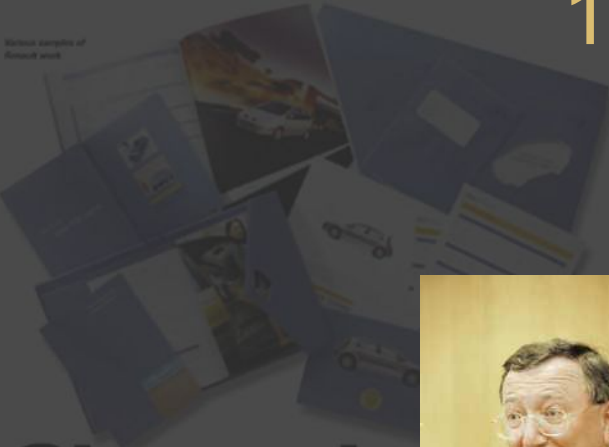
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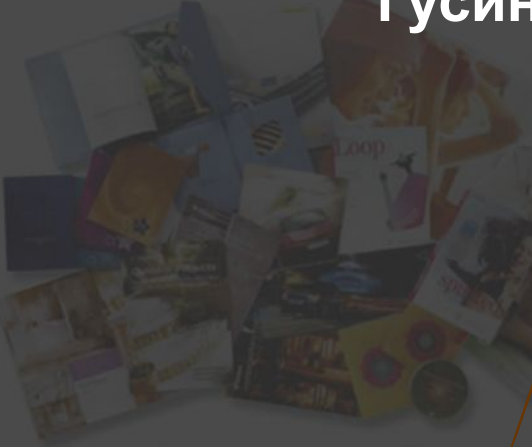
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Recent examples of Award work



Charterhouse

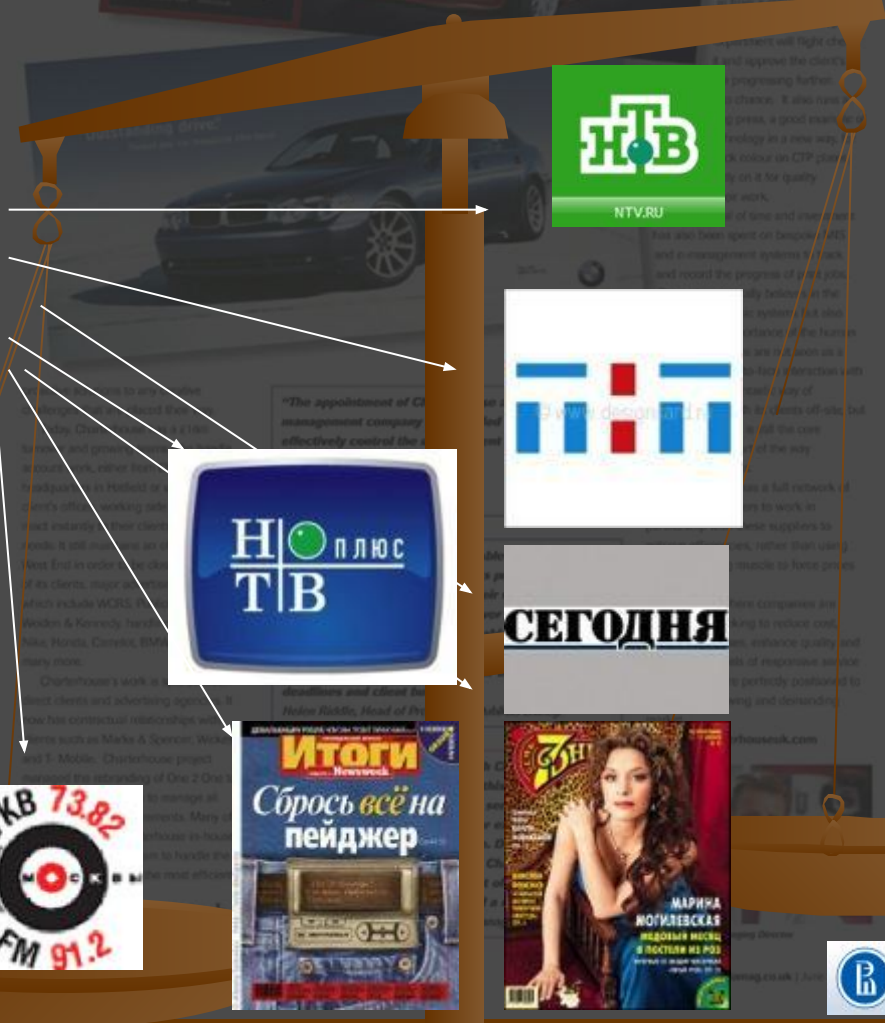
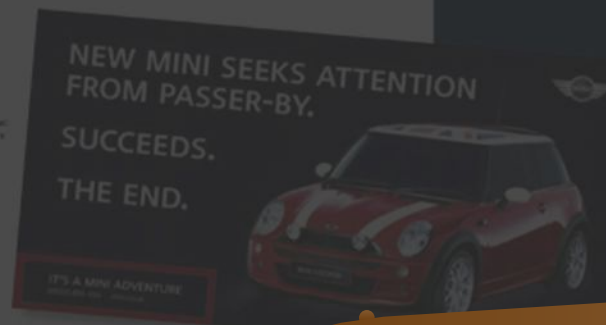
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Гусинский



2012

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Recent examples of work



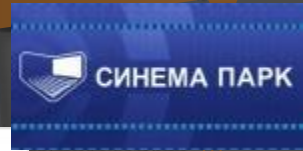
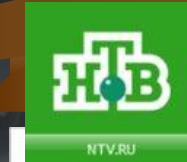
ГАЗПРОМ-МЕДИА

Charterhouse



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Ковальчук



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One of the company's major strengths is that across all of the account teams there is a very strong print manufacturing background and are all very aware of the strengths and weaknesses of each of the processes. They handle a huge variety of projects, including above-the-line advertising work, point of sale, direct mail, cardboard engineering and rebranding projects with a few exceptions for the technical side of printing. Above all they can provide

Recent examples of Award work



The growing demand to control print spending, cut lead times yet maintain quality in a dynamic business environment requires a special skills-set. Charterhouse has developed an enviable reputation for success in a demanding sector.

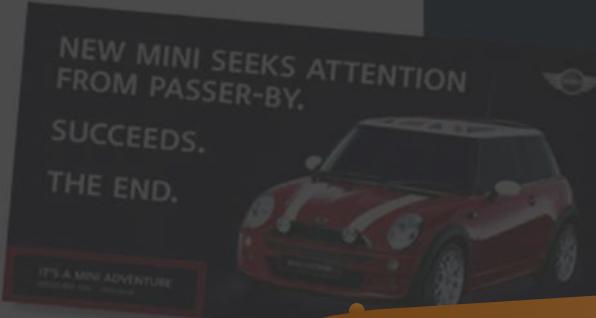


...exceeding expectations in print



100%

100%



solution to each and every production need. Charterhouse has an extensive array of digital proofers, flexos and top systems in order to be able to manage any job & receive from a design house. When a file comes in...

...problems will fight the client and approve the client's before progressing further. It is left to them. It also runs proofing press, a good example of technology in a new way. To check colour on CTP plates they rely on it for quality of their work. A great deal of time and attention has been spent on buying CTP management systems to track the progress of a print job. Charterhouse totally believes in the use of electronic systems and also has the expertise of the latest HD systems are in motion as a way to face-to-face interaction with clients. It is a fantastic way of dealing with the clients off-site, but that's not the case. It's at the heart of the industry.

Charterhouse works with a full network of suppliers and printers to work in partnership with these suppliers to achieve efficiencies, rather than using their purchasing muscle to force prices down. In a world where companies are beginning to make it to reduce costs, improve processes, enhance quality and increase high levels of responsiveness Charterhouse are perfectly positioned to deliver in a growing and demanding market.

www.charterhouseuk.com
Gary Mahony, Managing Director



2012

Charterhouse has grown into a major force at the cutting edge of print management leading the way forward with its ideas and initiatives. For many years it has dealt with a long list of blue-chip clients and established a pedigree of print management with the aim to constantly exceed its clients' expectations.

Its aim is to lighten its clients' workload and reduce their cost. From the very first meeting it participates fully with its client's creative team. By understanding a client's objectives at an early stage Charterhouse can draw on its experience and expertise to develop the practical solutions to meet their needs.

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One of the company's major strengths is that across all of the accounts there have a very strong print manufacturing background and are all very aware of strengths and weaknesses of each of processes. They handle a huge range of projects, including above-the-line advertising work, point of sale, direct mail, cardboard engineering and in-boarding projects with a fine appreciation for the technical subtleties of printing. Above all they can provide

Business examples of financial work



CTC-Media

The growing demand to control print spending, cut lead times yet maintain quality in a dynamic business environment requires a special skills-set. Charterhouse has developed an enviable reputation for success in a demanding sector.

39%

26%

35%



Ковальчук



Nasdaq Биржа



КОСТАФИЛЬМ



100%

100%

100%

100%

NEW MINI SEEKS ATTENTION FROM PASSER-BY.
SUCCEEDS.
THE END.



solution to each and every production need. Charterhouse has an extensive array of digital proofers, flexos and rip systems in order to be able to manage any job it receives from a design house. When a file comes in, the team will fight it out and approve the client's branding before progressing further. Nothing is left to chance. It also means the best printing press, a good example of using old technology as a new way to check colour on CTP plates. Many clients rely on it for quality, creating all their work.

A great deal of time and attention has also been spent on desktop CMS and e-management systems to track and record the progress of a print job. Charterhouse totally believes in the value of electronic systems and also recognizes the importance of the human touch. MS systems are often seen as a substitute for face-to-face interaction with its clients. It is a false way of communicating with its clients off-site, but the personal touch is what the core principle at the heart of the job. Charterhouse works.

Charterhouse has a full network of suppliers and partners to work in partnership with. These suppliers to deliver efficient services rather than using their purchasing muscle to force prices down.



1998

Charterhouse has grown into a major force at the cutting edge of print management leading the way forward with its ideas and initiatives. For many years it has dealt with a long list of blue-chip clients and established a pedigree of print management with the aim to consistently exceed its clients' expectations.

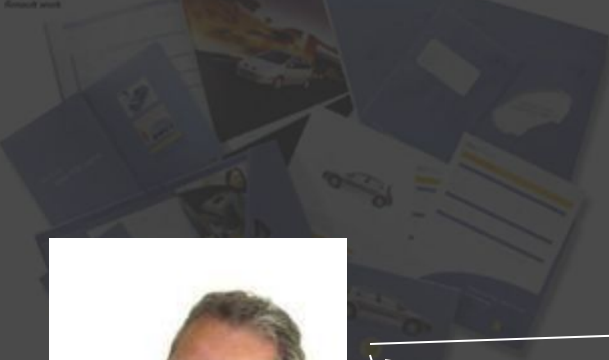
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Ten years ago Managing Director, Gary Mahoney, recognised that the market for print was changing and print management had emerged as the way forward. While in the early 1990s many companies were cutting back on their print buying departments to concentrate on their core activities, Charterhouse adapted to meet the needs for quality advice and professional guidance. Apart from the print management services, it also acts as a consultant to companies with needs for print related products.

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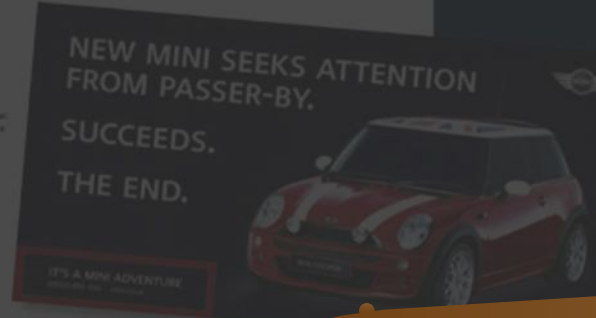
Recent examples of Award work



Derk Sauer



The Moscow Times
www.vector-logos.com



solution to each and every production need. Charterhouse has an extensive array of digital proofers, simulators and step systems in order to be able to manage any job & receive from a design house. When a file comes in, the team will fight ch...

and approve the client's branding before progressing further. Nothing is left to chance. It also means the best proofing press, a good example of old technology in a new way, is available to check colour on CTP plates. Many clients rely on it for quality, creating all their work.

A great deal of time and attention has also been spent on business process and management systems. Check...

"The appointment of Charterhouse as a print management company...

...a growing and demanding market...

Charterhouse for this time they have services. The quality expectations are... Due to the Charterhouse is of time to produce a delivery date. UK magazine, T-Mobile UK

Gary Mahoney, Managing Director

www.printmanagement.co.uk | London



Charterhouse has grown into a major force at the cutting edge of print management leading the way forward with its clients and initiatives. For many years it has dealt with a long list of blue-chip clients and established a pedigree of print management with the aim to consistently exceed its clients' expectations.

Recent examples of Charter work

Its aim is to lighten its clients' workload and reduce their cost. From the very first meeting it participates fully as its client's creative team. By understanding a client's objectives at every stage Charterhouse can draw on its experience and expertise to develop the most suitable solutions to meet their needs.

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The growing demand to control print spending, cut lead times and maintain quality in a dynamic business environment requires a special skills-set. Charterhouse has developed an enviable

2012

Independent Media



Media

SanomaMagazines

Independent Media Sanoma Magazines

SanomaMagazines



solution to each and every production need. Charterhouse has an extensive array of digital products, processes and top systems to make us able to manage any job & exceed from a design point. When a file comes



The Moscow Times

www.vectorlogos.com



is required to meet the needs for quality advice and professional guidance. Apart from the print management services, it also acts as a consultant to companies with needs for print related products.

One of the company's major strengths is that across all of its accounts teams have a very strong print manufacturing background and are all very aware of the strengths and weaknesses of each of the processes. They handle a huge variety of projects, including short-run time advertising work, point of sale, direct mail, cardboard engineering and retailing projects with a few exceptions for the technical side of printing. Above all they can provide



Charterhouse has grown into a major force at the cutting edge of print management leading the way forward with its ideas and initiatives. For many years it has dealt with a long list of blue-chip clients and established a pedigree of print management with the aim to constantly exceed its clients' expectations.

Its aim is to lighten its clients' workload and reduce their cost. From the very first meeting it provides its client's creative team with understanding a client's every stage. Charterhouse's experience and expertise provide practical solutions to its clients.

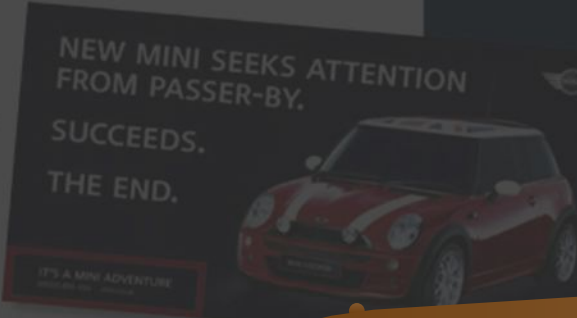
One of the keys to its success is the experienced professionals who can service on-site so ensure response and guarantee when it comes to print. Charterhouse is totally on-site to ensure press stops. This means they can act as partner for the job, they fix the timelines and the budget. It also means they can get on with doing it, controlling the quality of managing the process to the delivery.

Ten years ago Managing Director, Maloney, recognized that the print was changing and print management had emerged as the way forward. While in the early 1990s many companies were cutting back on their print buying departments to concentrate on their core activities, Charterhouse was established to meet the advice and professional from the print manager who acts as a consultant with needs to print in the future.

One of the companies that Charterhouse has a very strong background and well-established strengths and weaknesses. They have projects, including advertising work, periodical, cardboard and rebranding projects with a few exceptions for the technical skills of printing. Above all they can provide

Below examples of recent work

1998



Потанин



100%

51%

50%

49%

КОМСОМОЛЬСКАЯ ПРАВДА



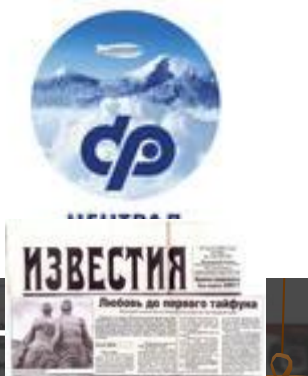
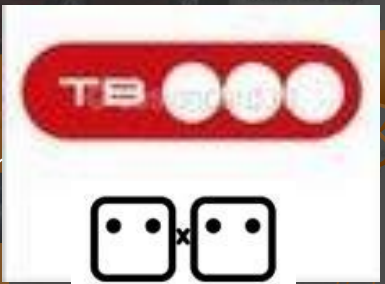
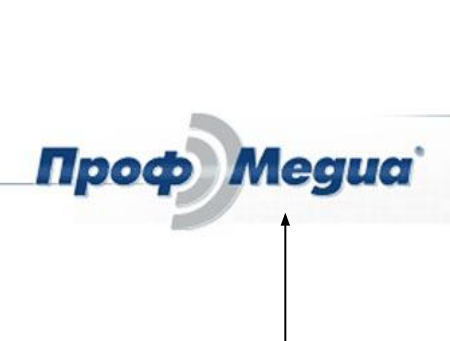
РУССКИЙ ТЕЛЕГРАФ



Charterhouse has grown into a major force at the cutting edge of print management leading the way forward with its ideas and initiatives. For many years it has dealt with a long list of blue-chip clients and established a pedigree of print management with the award-winning record to clients' satisfaction. Its aim is to lighten its workload and reduce their very fine margins it pertains to client's creative team. By understanding a client's business Charterhouse is able to offer the experience and expertise to provide solutions to meet it. One of the keys to Charterhouse's success is the experienced professionals who can provide a service on site so ensuring response and guaranteed when it comes to print. Charterhouse is totally independent in its business capacity. This means they can select the printer for the job, the right specialist that fits the timelines and the right cost for the budget. It also means that Charterhouse can get on with doing what it is good at, controlling the quality of the colour, and managing the process from reception to the delivery.

The growing demand to control print spending, cut lead times yet maintain quality in a dynamic business environment requires a special skills-set. Charterhouse has developed an enviable reputation in the leading sector.

2013



Продано в 2013

Продано в 2010

Продано в 2008



Продано в 2010



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Recent examples of Award work



Лесневская

РАО ЕЭС

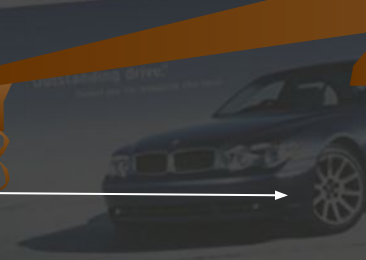


1998

30%

70%

NEW MINI SEEKS ATTENTION FROM PASSER-BY. SUCCEEDS. THE END.



solution to each and every production need. Charterhouse has an extensive array of digital proofers, flexos and step systems in order to be able to manage any job & receive from a design house. When a file comes in...

...clients will fight the ink and approve the client's branding before progressing further.

"The appointment of Charterhouse as our print management company has enabled Wicks to cost effectively control the quality and quantity of all our in-store print."

"Charterhouse has made a significant contribution to the service and creative excellence provided by Publicis Dialog to our clients. Their knowledge base, purchasing standards, creative and marketing skills have exceeded the 'wow!' dimension regarding deadlines and client feedback."

"T-Mobile has been with Charterhouse for this time they have provided us with an excellent service. The quality of their work has always exceeded our expectations and their prices are very competitive. Due to the dynamic nature of our business Charterhouse is always left with the freedom to work and have new ideas. T-Mobile UK"



2013

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Ten years ago Managing director, Gary Mahoney, recognized that the market for print was changing and print management had emerged as the way forward. While in the early 1990s many companies were cutting back on their print buying departments to concentrate on their core activities, Charterhouse stepped in to meet the needs for quality advice and professional print management services from the print management sector.

Over the years Charterhouse has built up a reputation for success in a demanding sector. In 2013, Charterhouse was awarded the 'Print Management' award by the Print Industry Association (PIA) for the second year running. This recognition is a testament to the company's commitment to excellence and its ability to deliver high-quality print management services to its clients.

Business examples of Charterhouse work



Национальная медиа группа



Ковальчук



100%

95%

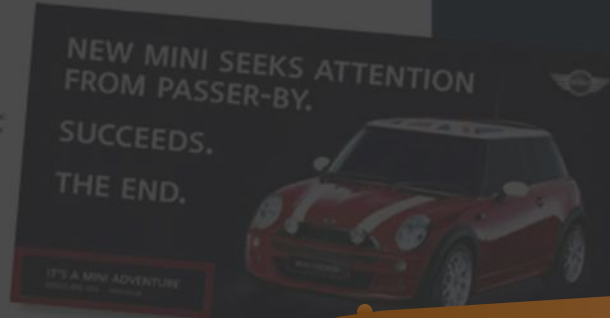
5%

75%

98%

26%

25%



Новые империи

CHARTERHOUSE ● ● ● FEATURE

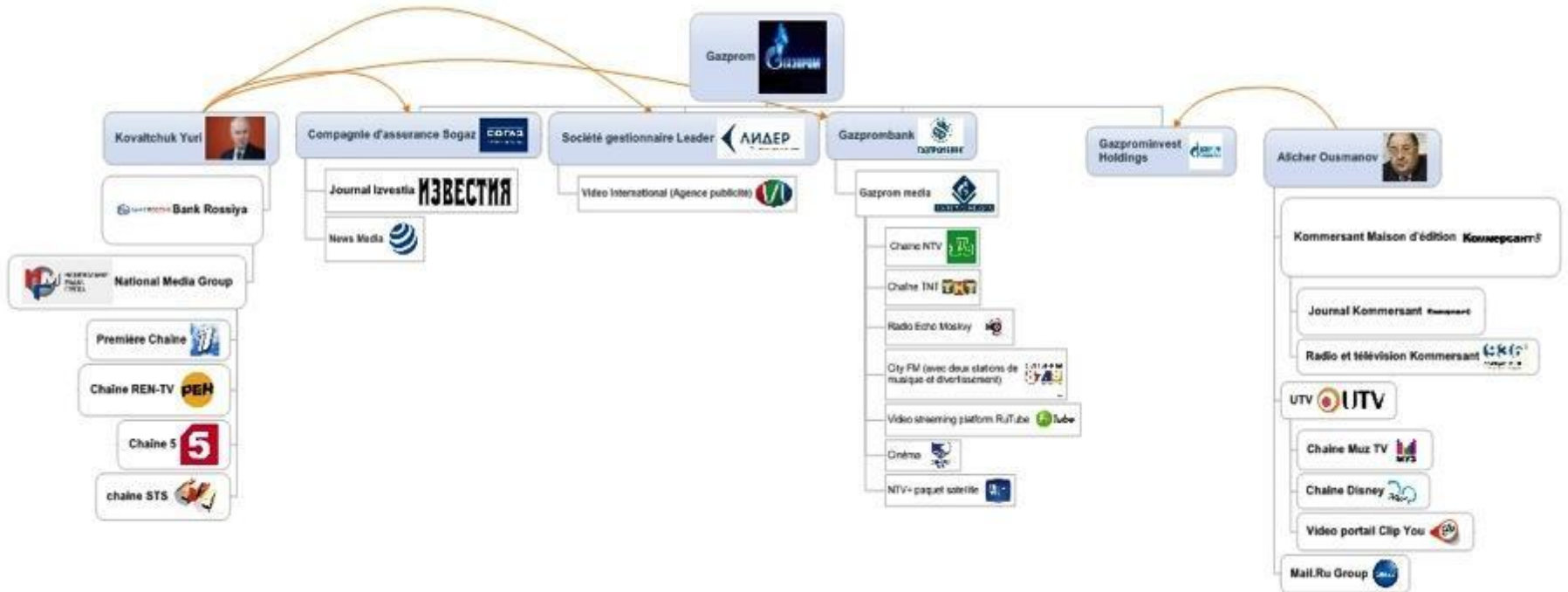
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Recent examples of Award work

NEW MINI SEEKS ATTENTION
...SUCCEEDS.
THE END.
IT'S A MINI ADVENTURE



solution to each and every production need. Charterhouse has an extensive array of digital products, processes, structures and top systems in order to be able to manage any job it receives from a design house. When a file comes in, the team will fight to it and approve the client's branding before progressing further.



working projects with a few...
appreciators for the technical side of...
printing. Above all they can provide

...exceeding expectations in

our work and have new...
of French, Creative S

"a delivery date,"
images, T-Mobile UK

Gary Murray, Managing Director



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from its core activities, Charterhouse has expanded its services to include a range of other services, including advertising and marketing, design, and creative services. Charterhouse has a full network of suppliers and partners to work in partnership with these suppliers to achieve efficiencies, rather than using their purchasing muscle to force prices down.

As a result, Charterhouse has become a leading force in the industry, creating value for its clients and providing a high level of responsive service. Charterhouse are perfectly positioned to meet the needs of its clients and to provide a high level of responsive service.

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Below example of Award work

Right and below: Outdoor posters

Старая элита



The growing demand to control print spending, cut lead times, maintain quality in a dynamic business environment requires special skills-set. Charterhouse has developed an enviable reputation for success in a demanding sector.



Новая элита



MTG
MODERN TIMES GROUP



Собственность в ТВ

Первый мультиплекс	Второй мультиплекс
Первый	Рен ТВ
Россия 1	Спас
Россия 2	СТС
НТВ	Домашний
Пятый канал	ТВ 3
Культура	Спорт +
Россия 24	Звезда
Карусель	Мир
ОТР	ТНТ
ТВЦ	Муз ТВ

Прямой контроль

Непрямой контроль

Частные



Издательские дома (всего)

ИД	Ауд.	%	Изд.
Burda	16566	28,7	25
HFS и ИМГ	13557	23,5	10
Bauer Media	11631	20,1	15
Independent Media	10090	17,5	12
АиФ	7145,9	12,4	1
Семь дней	6970	12,1	4
Комсомольская правда	6902	11,9	4
За рулем	6717	11,6	4
Популярная пресса	5261	9,1	3
Пронто-Москва	3813	6,6	2

Иностранный капитал активен там, где нет политики

Интересы собственников

- Не всегда имеют экономический характер: (Газпром-медиа, имея вполне успешное московское радио «Эхо Москвы», открывает другую городскую станцию, чтобы воровать само у себя аудиторию).
- Смещение в сторону третьего типа. Второй уже не нужен, когда олигархи в достаточной степени «итак лояльны».