



Now Virgin eyes Ecudis slice

FRANCE — Rumours are growing that Virgin Interactive Entertainment is about to buy at least part of leading French Nintendo distributor Ecudis.

The ambitious UK games firm refused to comment, but *CTW Europe* understands that VIE sees distribution and the ability to penetrate retail as the major battleground in what will be a tough 1994 marketplace.

VIE has had a wholly owned operation in France since 1992. It uses the Lyon based Ecudis for its fast-growing Nintendo business.

Ecudis made its name with Ocean's powerful Nintendo

business, and has quickly established a strong reputation. It is believed to turnover around £13 million and — working almost in co-operation with the other main Nintendo distributors, Bandai and Nintendo itself — has blanket coverage of the territory's retail network.

It is understood that the strength of Ecudis is its merchandising and sales team, and it is almost certainly this — rather than any warehousing or traditional wholesaler facilities — that VIE is interested in. It is possible that VIE would take a stake in Ecudis in order to influence that side of the firm's business, or simply carve off the 'on the road' division in its entirety.

The advantage for VIE would be

the removal of a distributor margin, and the ability to block other titles passing through what is clearly a first class system. It would also provide the UK firm with an 'eye on the street' in a very large, but hard to monitor territory.

Unlike the UK, where the vast majority of the market can be covered by selling-in to a dozen or so buyers and the indie-specialising wholesalers, France needs far more activity in the field.

Hypermarkets, which include the likes of Carrefour, Leclerc and Auchan, have a 63 per cent market share of game sales in total and well over 1,000 outlets. But each individual store manager has a buying responsibility and needs to be serviced effectively. The second

tier of games retailers in France (19 per cent) are the 'multi-specialists'. More closely related to UK-style chains, they are dominated by the likes of FNAC, Virgin Retail and Conforama.

VIE's non-Nintendo business currently goes through Sega France and a collection of floppy distributors such as Innelec and Guillemot.

The firm is keen on European growth, and last year opened a German office — a move which has been followed by many UK and US publishers in recent months.

VIE's global turnover for the fiscal year to July is forecast to be around \$200 million. France is expected to represent around 25 per cent of the \$70 million European business.

VNU gets serious with games mags



POWER UNLIMITED: Major marketing support, more launches to follow?

HOLLAND — VNU has signalled its seriousness in the games magazine market by setting up a new subsidiary.

The Dutch media giant has formed VNU Electronic Leisure Publishing. It will handle the six month old multi-format games title *Power Unlimited*, but is also considering further launches.

Power Unlimited covers everything from static consoles to handhelds, PC, Apple Mac and arcade machines. It is currently boasting sales of around 30,000 from a print-run of 65,000.

Selling throughout the Benelux countries, the title has quickly established itself as the leading publication. In a market dominated by Nintendo, its nearest rivals are the brand-specific *SuperPower* (SMP) and *Nintendo Player* (Media Systeme Editions).

Such is VNU's commitment to its sole games title, the firm is planning a £200,000 promotion for *Power Unlimited* in the second quarter of this year — including TV slots.

As well as possibilities in its home territory, the firm is also taking a close look at international publishing opportunities.

Eastern promise boosts Vision's Czech dream

CZECH REPUBLIC — The Eastern European territories are finally starting to open up, with a new Prague based firm widening distribution and launching a multi-format games title.

Called Vision, the firm is only a year old but claims to be witnessing a surge in interest and business for games products. It is currently the exclusive agent for Electronic Arts, MiroProse, Virgin Interactive Entertainment and Sierra, with other labels' products being bought via Centresoft in the UK.

Vision's efforts to develop the territory have seen the opening up of the Czech Republic's first dedicated games store and the

launch of a monthly magazine called *Score* — boasting a print-run of 30,000.

Later this year, the firm intends to appoint a sub-distributor for the closely related state of Slovakia. It also wants to publish the first ever software title fully translated into Czech.

"Once we have nationwide distribution, the major limitation to the size of our market is the fact that only a proportion of the population is conversant enough in English to read and understand a 50 page manual," commented Vision director Nick Pendrell.

A full rundown of the emerging games markets in the Czech Republic, Slovakia and Hungary is featured on pages ii and iii of CTW Europe.

Elite opens up German office

GERMANY — Elite is opening up its first office outside the UK, with a new base in Karlsruhe.

The move comes after several years of disappointing activity in Germany, with distributors increasingly being unable to cope with the investment levels required — particularly on cartridge titles — to make a product reach its potential in the territory.

After a series of one-off deals last year, Elite has decided to start selling direct to retail from April 1st. The Karlsruhe HQ will provide a solely sales function at first, back-

ed up by marketing support controlled from the UK.

The new office will be run by Jens Gamperl, and will be responsible for all Elite's Nintendo and floppy business throughout Germany, Switzerland and Austria, plus the Codemasters Sega product recently signed up.

"We've come to the conclusion that Germany is a country with 80 million people, and it's not really a market that can be looked after by someone with a couple of O Levels going there twice a month. You've got to be on the ground and do things properly," commented Elite director Brian Wilcox to *CTW Europe*.

EMS adds on French double

FRANCE — Emerging games distributor Euro Marketing Services has signed up deals with Accolade and Infogrames.

The firm, set up late last year by former MicroProse France and Activision Europe boss Thomas Ormond, is kicking off its Infogrames relationship with the exclusive handling of The Smurfs across Nintendo and Sega formats. The first version, Gameboy, will be released by the end of March.

At the same time, EMS has started supplying Accolade titles to retail, and will be taking on *Pele*, *Bubsy 2*, *Speed Racer*, *Barkley Basketball* and *Brett Hull Hockey*.

EMS specialises in sales, distribution and marketing of Nintendo and Sega software throughout France and the Benelux countries. The firm announced late last year that it had taken on the expanding video game catalogue of the Software Toolworks and Mindscape brands.

Tronics opens Estonian route

ESTONIA — Software and peripherals distributor Toptronics has made an ambitious move into a corner of the former Soviet Union.

The firm, which is the official agent for over a dozen leading games firms in Finland, has opened up a subsidiary in Tallinn, Estonia.

It is being pitched as a fully functioning marketing and distribution organisation, with local staff. It will handle all Toptronics' existing labels, plus several new product ranges. Shipments will be on a daily basis through TNT, with an estimated turnaround of 24-48 hours.

"This is a great opportunity for Toptronics. Estonia and other former Soviet Union republics are rather like the 'Wild West' without any rules. Due to this fact, we have decided to handle all warehousing and shipments from Finland," commented boss Timo Lehmuskoski.

Gametek takes third Euro HQ

GERMANY — Fresh from its successful US flotation, Gametek is opening up its third European HQ.

The firm raised around \$20 million from its public offering of 49 per cent of the company last week, and immediately earmarked a slice of it for European investment.

Thus, an office in Dusseldorf becomes operational this month — complementing the HQs already performing well in the UK and Paris. It will be headed up by John Williams, who has been with the firm since October and previously had spells at Codemasters and Konix.

Gametek's European business consists of its own Nintendo and floppy/CD products, plus sundry affiliated labels. The firm's global turnover is forecast to hit some \$60 million for the fiscal year to July 31st — with Europe contributing at least 15 per cent.

Sony takes Tradewest European business

Sony has expanded its European empire, signing a long term exclusive distribution agreement with US publisher Tradewest.

The deal covers a number of Sega and Nintendo products already in development as well as some externally licensed titles.

The first two titles to be covered by the deal will be *Battletoads — Double Dragon* for Mega Drive, SNES and Gameboy and an entertainment package provisionally entitled *Fun 'n' Games* for Mega Drive and SNES.

Sony Electronic Publishing's director of business development Nick Garnell offered: "Tradewest has an outstanding track record for producing innovative professionally created games. Sony are pleased to be associated with Tradewest, especially as the titles involved are of such high quality."

Tradewest's president Byron Cook added: "This agreement gives us the opportunity to deliver products in the European market by taking advantage of Sony's superior international sales and marketing skills and their diverse distribution channels."



CTW EUROPE: THE HUNGARIAN MARKET

HUNGARY FOR SUCCESS?

Claimed to be the high-flyer of the new breed of Eastern European states, Hungary has already attracted sales and marketing activity from Sega and Nintendo, and the computer games market is finally opening up too. Herein, GABOR FEHER of leading magazine *Guru* and STUART DINSEY offer an invaluable synopsis of the market...

Since the first boom in home computing and games software a decade ago, a massive, maturing market has developed across Western Europe.

Clearly, historical trade restrictions in Eastern European territories meant that markets like Hungary — although sizeable in terms of potential — were all but

closed off completely.

Naturally, the games firms themselves concentrated on developing business in the UK, France, Germany and suchlike — although some hardware did make it across the borders into what was then known as the Eastern bloc.

Computer Games Market

In the early days, retailers importing computers weren't experienced and really concentrated on the sale of the limited number of machines they had brought in. Software quantities were very small, and tended to be productivity or business based rather than games.

But the consumer's desire to relax and play was there, and since the people couldn't buy games

they found another, illegal, avenue — they bought pirated software.

Some people sold copied games and some just exchanged them or lent them out for further free duplication. The only games actually sold in shops were the ones developed from within Hungary. There weren't many of these, but they were relatively high quality.

In 1989, Hungary became the first of the many Socialist countries to start political and economic reforms — freeing itself of control from Moscow.

The state gained a new name, Hungarian Republic, and trade with the west became far easier. Of course, the pirating of software continued, but professional companies — who know the legal position and want to grow the games market here — have begun to emerge.

In 1992 a multi-format magazine called *Guru* was launched. It was the first title dedicated to games, and attempted to provide quality editorial and reviews, as well as educate the public about piracy. Its rivals are *Chip* and *Computer Panorama*.

Last year *PC Guru* arrived too, beginning life as a bi-monthly and then going monthly. A specialist consoles title is also being considered for launch later in the year.

From a slow beginning, the market really began to move forward last year. More shops opened up, it may not sound many but there are now six shops in Budapest that sell computer games. They all import from the US or from the German retailers.

Since the market only really started in 1993, you can't expect it to become big overnight, but the games sold increase month by month. The truth is that budget games suit the market best, but selling full price games is by no means impossible — Pixel Graphics Computers, for example, bought 50 copies of *Rebel Assault* (a PC CD-ROM game) to sell before Christmas. They sold out in just two hours.

In the next few days, *Rebel Assault* then sold another 100-150 copies. Maybe this is not a very big number, but it is very encouraging, and things can only grow from here.

Hungarian Market Contacts

<i>Guru</i> (games magazine)	Tel: + 361 183 7299
Acomp Computers Ltd (Amiga CD32, CD-ROM)	Fax: + 361 251 2385
WIN Computer (PC games)	Fax: + 361 117 2834
Ke-Szo (PC games)	Fax: + 361 111 8268
Novotrade 2C (Sega, Amiga, C64, PC games)	Tel: + 361 140 2954
Pixel Graphics (PC games)	Fax: + 361 153 0627
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Primex RT (Sega)	Tel: + 36 62 342654
Videoton (Sega)	Tel: + 361 122 3447
Stadlbauer (Nintendo)	Tel: + 361 181 1525
Skala (retailer)	Tel: + 361 185 2222
Porst (retailer)	Tel: + 361 122 2694

CTW EUROPE: CZECH REPUBLIC

THE TWO-IN-ONE TERRITORY

CTW Europe continues its look at Eastern Europe with an in-depth analysis of the current games market in the Czech Republic and its closely related neighbour Slovakia. With a combined population of over 15 million and a burgeoning local network of retailers and distributors, the potential is huge. NICK PENDRELL reports...

Of the three most westerly former Eastern Bloc countries — Poland, Czechoslovakia and Hungary — Czechoslovakia was the country with the most restrictions imposed on it by the Communists following the Prague Spring uprising of 1968.

As a result, after the Communists were deposed and democracy was re-instated in November 1989, Czechoslovakia had an even harder task than its neighbours to restore the country to its former glories. It was, after all, the sixth most industrialised nation in the World in the 1930s, with a standard of living higher than that of Switzerland.

Four years later, the country has made remarkable progress under the leadership of former playwright and dissident, Vaclav Havel, when compared to its neighbours — with relatively low inflation, a stable exchange rate, low unemployment, a positive balance of payments and a stable, popular Government.

On January 1st 1993, the Czech Republic, with a population of 10.5 million, separated amicably from Slovakia, which has a population of 5 million. Although Slovakia is now a totally autonomous country, it has and will have for the foreseeable future, very strong economic and cultural links with the Czech Republic — comparable to the relationship which exists between the UK and Eire.

Video Games

Sega was the first of the two major consoles to be imported into the Czech Republic, starting in October 1992. The first importer was Datart, an Anglo-Czech company which is also a major importer of electrical goods. Datart is a non-exclusive distributor for Sega, obtaining product from the Japanese trading house Nissho Iwai.

In mid-1993, Datart started to receive competition from Itoh, another Japanese trading house which began to import Sega games and hardware through its own subsidiary in the territory. Due

to the fact that Datart had been in the market for a longer period and the fact that it has a number of its own stores in Prague and other key cities, it is likely that Datart still controls more than 75 per cent of the total Sega business in the Czech Republic.

Nintendo reached the Czech market in early 1993. The company representing it is MPM, which is the Czech Republic's leading producer, importer and distributor of plastic model kits. MPM licenses Nintendo products from the Austria-based distribution firm, Stadlbauer Marketing, which holds the official Nintendo distribution rights for all of Central Europe.

As CTW Europe readers will already have realised, accurate sales figures for consoles are very difficult to obtain. This is even more marked in the Czech Republic, where many consoles are likely to have been brought in from Germany and Austria.

However, Datart estimates that there are currently around 8,000 units each of Master System and Mega Drive in the territory, against 2,000 units each of NES and SNES, which appears to be realistic.

As for handhelds, the Gameboy probably has a slight edge over Game Gear, with an estimated installed base of 4,000 units — around a thousand ahead of its colour screened rival. As for software, Datart believes that the generally accepted ratio of three games per console is valid for the territory.

As for 1994 sales projections, both the Sega and Nintendo importers are bullish, with Nissho Iwai targeting sales of 20,000 units across all Sega formats for 1994. But in the absence of any major marketing campaigns planned for the year — due to the relatively high cost of TV advertising — even Datart would probably admit that these figures seem somewhat optimistic.

Computer Games

Before the revolution, limited numbers of games computers began to be imported onto the

Czech and Slovak markets, with most major machines beginning to appear — including Amigas, Atari STs, C64s, Spectrums and a locally produced Spectrum clone known as Didaktik.

After the pro-democratic events of late 1989, both Atari and Commodore appointed local agents. This resulted in the Amiga becoming the leading games machine in the territory, mirroring the situation across the rest of Europe. Even so, it is unlikely that there are more than 10,000 Amigas installed in homes.

As for software, the market was for a long time 100 per cent pirate — as was (and still is) the situation across much of Europe. Pirated versions of virtually all games are easily available, with many games available from the pirates even before their official release dates. The pirated games are downloaded from bulletin boards and sold for Kc10 (23p) per 1Mb.

Legitimate games were first made available in a small way when Ultrasoft, based in Bratislava, the capital of Slovakia, began to import legitimate software in late 1991. Ultrasoft has since become the authorised representative for Ocean, US Gold and Domark. The company imports games for all major formats — including Amiga, ST, C64 and PC. It also produces games itself for the Spectrum/Didaktik.

The Czech Republic gained its first fullscale games distribution operation in February 1993, with the formation of Vision, an Anglo-Czech company based in Prague. Unlike Ultrasoft, Vision decided to specialise in PC games, along with a few of the best Amiga titles. The company believed that top-of-the-range PC titles would be harder for the pirates to copy, and PC owners would be more likely to afford games costing Kc 1300-1800 (£30-£40) — which represents one week's salary for the average Czech.

Vision's decision has proved to be correct, with 85 per cent of its sales coming from PC products. Obviously, compared to other

European territories, sales of computer games are modest, with Vision's best selling titles — such as *Ultima Underworld II*, *Great Naval Battles* and *X-Wing* — selling 300 or so copies.

Importantly, though, the market for computer games is doubling every three months, as more and more retailers begin to stock them. Vision has since become the authorised Czech representative for Electronic Arts, MicroProse, Sierra On-Line, Virgin Interactive Entertainment and Millenium.

There are currently no Czech-specific versions of computer games being produced in the territory for PC and Amiga, although Vision is hoping to test at least one title for the pre-Christmas market this year.

Magazines

Czechoslovakia's first computer games magazine was *Excalibur*, which was launched in mid-1992. It was multi-format, covering PC and Amiga as well as limited editorial on Atari, Sinclair

and C64. From mid-1993, the smaller formats were replaced by coverage of Sega and Nintendo.

In December 1991, Slovakia gained its own computer games magazine, called *Bit* — published by the local Slovak importer and distributor Ultrasoft. This magazine covers PC and Amiga titles, as well the smaller formats like Atari and Spectrum/Didaktik.

The newest magazine in the Czech Republic is *Score*, launched by a company affiliated to Vision. *Score* is a glossy multi-format magazine modelled after the best of the UK and German magazines. The magazine was launched in December 1993, aimed at a more sophisticated adult market than the two competing titles.

Today, *Score* has a circulation of around 25,000 per month, with *Excalibur* at around 15,000 and *Bit* at around 10,000.

For further information on Vision and the Czech and Slovakian markets, contact Nick Pendrell on + 42 2322960 (Tel) or + 42 2322874 (Fax).

Simply adapted press ads are raising consumer awareness

Piracy

In November 1993, a law was passed concerning computer software piracy. It stated that unauthorised copying, lending or hiring software is against the law. The day after, *Magyar Nemzet* — one of the biggest daily papers in Hungary — gave a large amount of coverage to the new rules, claiming that the Government had already started training policemen to understand and track software theft.

Media

The Hungarian media is growing rapidly, vastly increasing the communication links between manufacturers and consumers. The territory also has a major advantage in that it is the most relaxed and peaceful country amongst the 'new' Eastern European states.

Much of the public is now tuning into MTV or German satellite stations like RTL. Average wages are, obviously, lower than in the UK or Germany, and that is why budget games suit the market better. The most popular titles are English language.

Significantly, Sega and Nintendo began advertising in Hungary last year. Both now have sponsored programmes on national TV too. The *Guru* magazines also have a 'games of the month' slot on a TV show, plus a computer section within in the Hungarian teletext service.

Sega

As in the Czech Republic and Slovakia, Japanese firm Nissho Iwai Corporation is at the heart of Sega's activity.

Its video games operation

started around three years ago, quickly establishing a relationship with the large Hungarian firm Videoton — which bought some stock, but originally had difficulty in gaining success. In 1993, however, business improved dramatically and marketing-led strategies are now working well.

Nissho Iwai's Sega business transcends across Hungary, the Czech states, Russia and Poland.

Its strongest partners are Al-Step Ltd, Primex RT, Novotrade 2C and Videoton. In September, Nissho achieved around \$500,000 worth of business for the Christmas sell-in. More than half of this was hardware-based.

The emphasis was on the Master System, followed by the Mega Drive, with a very small amount of Game Gear — because there is no TV adaptor due to Hungarian TV technicalities.

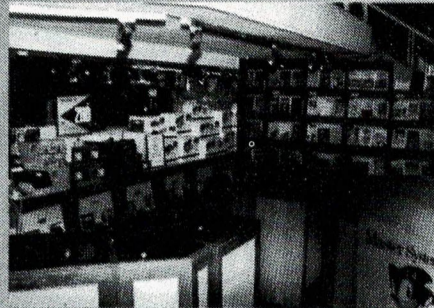
According to Sega, Hungary is just one per cent of its European business at present. Some 30,000-50,000 hardware units are forecast to be sold in this year. Throughout Christmas the firm was head to head with Nintendo.

As far as software is concerned, the immaturity of the market effects the games per machine ratio. It is as high as 10:1 in Japan and possibly 5:1 in the leading Western European markets. But in Hungary, it is more like 3:1.

But there is also a considerable number of 'invisible' import sales. Software comes in from Austria, with consumers paying no tax as they cross the border.

Retailers like to order small stocks of game titles, but frequently, thus avoiding the need for a large inventory risk. Over Christmas, lead titles like *Aladdin* were consistently in a stock-out situation.

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Kiegészítők

NOVOTRADE: Games distribution Hungarian-style

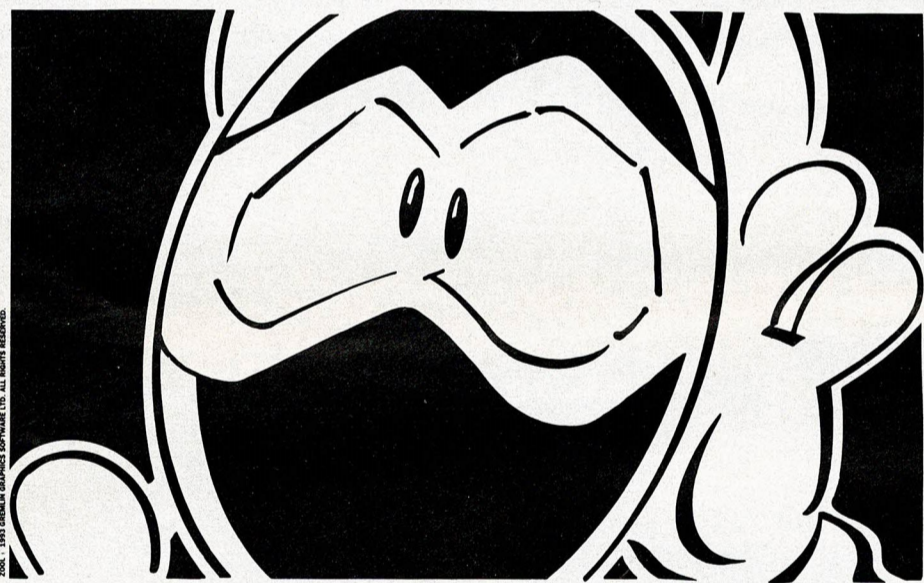
Nintendo

Represented by Stadlbauer, Nintendo has been operational in Hungary since 1991. Sales have been tripling year-on-year since, with a total installed Nintendo hardware base of around 50,000 units at present — partly from of-

ficial sales activity, and partly via imports. It claims to be market leader in the territory.

The theory, according to Stadlbauer, is that sales can continue to grow rapidly but the tripling cannot go on. Promotional activity will, obviously, increase but the market is effectively held back by the pace of economic growth.

If it is agreed that there are three million households in Hungary, only around 100,000 are affluent enough to buy Nintendo or Sega systems with readily disposable income. Around 900,000 would have to save to eventually make the purchase, whilst — at present — some two million simply couldn't afford a machine. □



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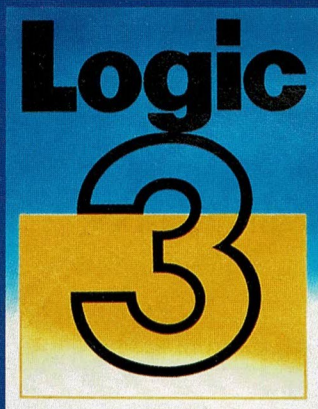
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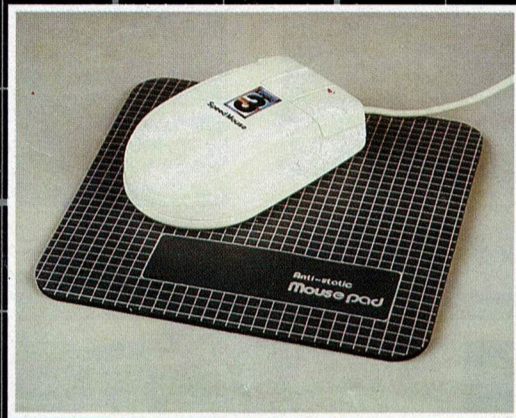
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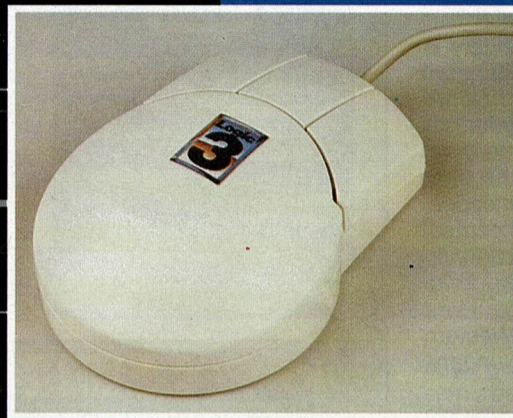
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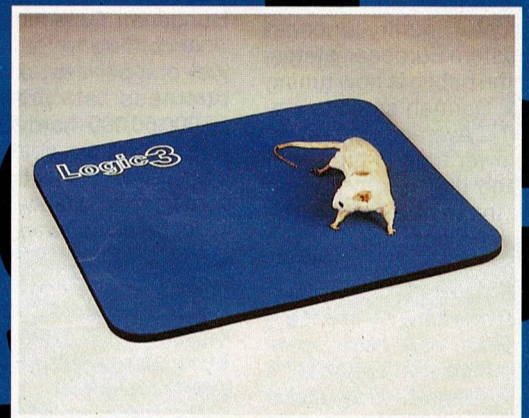
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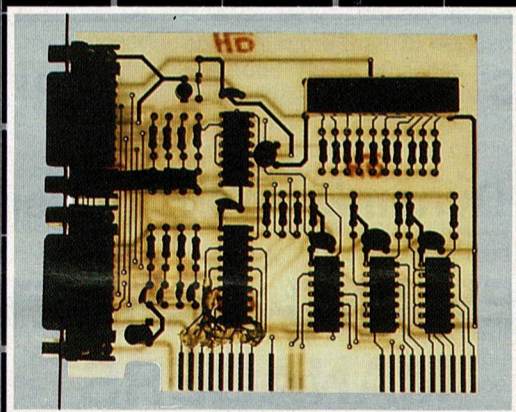
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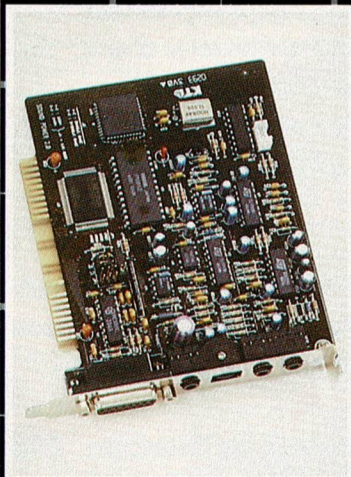
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