# SCREEN INTERNATIONAL



# STATE OF THE REGION 2014

SARAJEVO FILM FESTIVAL REGIONAL FORUM AND CREATIVE EUROPE MEDIA CONFERENCE SUPPLEMENT

Sarajevo Film Festival
15-23/August/2014 POWERED BY HT ERONET

Creative Europe MEDIA

# STATE OF THE REGION

SARAJEVO FILM FESTIVAL REGIONAL FORUM AND CREATIVE EUROPE MEDIA CONFERENCE SUPPLEMENT



PROGRAMME

**Sarajevo Film Festival Regional Forum and Creative Europe – MEDIA Conference**

**Date** August 20-22, 2014

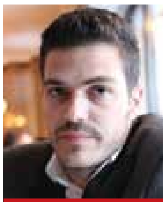
**Venue** Hotel Europe conference hall, Sarajevo, Bosnia and Herzegovina

**August 20, 16:00 – 18:00**
**International co-production — spreading the European co-production model overseas**
The Regional Forum will explore how European film-makers can forge international relationships and open up new markets to build on existing co-production partnerships

**August 21, 11:00 – 13:00**
**Reaching the audience**
Explores the different ways films reach viewers throughout Europe. The starting point is the Film Audience Survey

**August 22, 11:00 – 13:00**
**Film literacy — a strategy for audience development**
How to develop the audience of tomorrow through a European-wide film literacy programme

# WELCOME


Jovan Marjanovic


Mirsad Purivatra

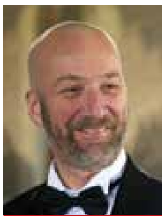
We are delighted our annual Regional Forum is hosting one of the Creative Europe MEDIA Conferences this year. Moreover, this is extremely significant for us because it coincides with Bosnia and Herzegovina's signing up for the full participation in the new Creative Europe programme.

The two panels on the last two days are part of the CE MEDIA Conference and are focused on pan-European topics of understanding the European audience and discussing the pan-European approach to film education. The first day, however, focuses on an even wider international topic, but from a distinctively Southeast European angle, looking at how a set of small countries in this region could open new markets for their films through global co-production. To add to this debate we are also looking to discuss our own Sarajevo City of Film Fund that has been supported by the Creative Europe MEDIA's International Coproduction Funds support scheme. With it, we would like to help diversify the co-production patterns giving international producers a completely new incentive to co-produce their films with minority Southeast European partners, while at the same time providing a necessary additional source of funding for Southeast European producers when financing their projects as majority coproducers.

We can only hope our region's further integration into the EU audiovisual space and its consequent international expansion can be followed by new policies and results, both cultural and commercial, and that our Regional Forum can keep serving as a relevant platform to discuss and advocate such policies.

Our gratitude goes to Dag and Matteo and all at Creative Europe, as well as their former colleagues Xavier, Aviva and Irina, and the *Screen International* team for their support in preparing this year's conference. Welcome to Sarajevo!

*Mirsad Purivatra and Jovan Marjanovic, Sarajevo Film Festival*


Dag Asbjornsen


Matteo Zacchetti

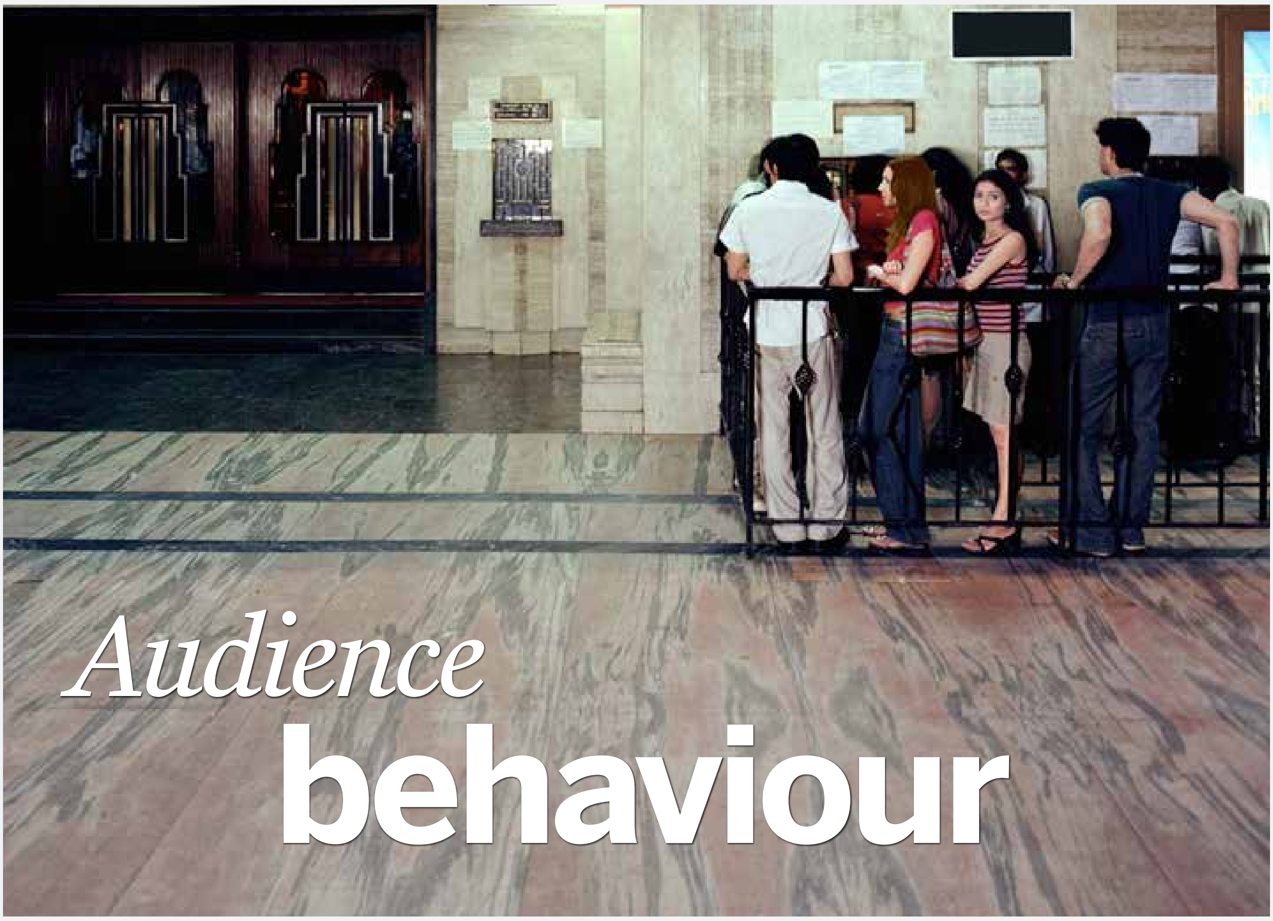
The European Commission recently published a communication on European film in the digital era. One of its main points is that while Europe is good at producing a high number of diverse feature films, most European films do not reach all their potential audience in Europe and even less so in the global market.

This is true in the field of traditional cinema, and even more true on the new digital platforms. Even if these platforms offer new and existing possibilities for distributing films, the availability and visibility of European films is low. This was one of the main conclusions of the audience study carried out by Attentional/Headway for the European Commission, and which will be presented at the Regional forum MEDIA conference this year. Another, more promising result of the study is that there is great interest in European films. But they are difficult to find. And often the audiences do not even know what to look for.

What can be done to raise the awareness of European films? Film literacy and audience development are some of the answers, also suggested by the study. This insight has been shared in many European countries, most recently in France, where CNC and Unifrance have published a report on film education. A main concern here is to reach the 'lost generation': young people who have grown up with digital media and do not go to the cinema — but download a lot of films.

The European Commission is very happy for the opportunity to discuss these important issues for European cinema in the context of the Regional forum of the Sarajevo festival. At a moment when the Balkan countries are in the process of joining Creative Europe — MEDIA this is for us the best location to get input from the region on EU policies. We thank Mirsad and Jovan and their team for a fruitful co-operation and hope for some lively debates. We also thank our former colleague, Irina Orssich, for taking the initiative to this event.

*Dag Asbjornsen and Matteo Zacchetti, European Commission*



# Audience behaviour

The ground-breaking Reaching The Audience survey is one of the biggest of its kind ever undertaken and offers a unique insight into the cinema-going habits of European society. This is an executive summary from the report by Attentional, Headway International and Harris Interactive

An online survey of 4,608 Europeans aged between four and 50 living in 10 countries — Croatia, Denmark, France, Germany, Italy, Lithuania, Poland, Romania, Spain and the UK — took place in March and April 2013, with respondents recruited from Harris Interactive Europe.

Nearly all of the respondents — 97% — watch films at least sometimes, of which 54% do so every day, as against 56% for TV series. Across the 10 European markets, nearly 100% of respondents own at least one device that enables the consumption of video and film at home. Outside the home, 14% of respondents have no access to cinemas within 30 minutes of their homes. This figure rises to 16% in Croatia, 27% in Lithuania and 37% in Romania.

Film viewers watch films on a wide array of devices and venues with 87% watching films in a cinema, 90% on TV (including pay-TV), 85% on computer and 67% on DVD. Children and young adults go to the cinema and use VoD more often than adults. They also watch more films on home video, especially DVD. Of those with smartphones, 40% of owners watch films on the device and 62% of tablet owners use these to watch films.

Nearly half of respondents are or have been reached by film education programmes: 43% of respondents 'watch or have watched films as part of a course of study at a school, university or in adult education'. The highest reach for these programmes can be found in Romania (63%), Italy (53%) and Spain (50%) while the lowest reach is in Germany (24%), UK (27%) and Croatia (36%).

The majority of those who experienced film clubs or training programmes agreed it 'raised their curiosity for other types of cinema' and led them to watch more diverse films (40% 'strongly' agree), 'raised their interest in cinema' and led them to watch more films (37% 'strongly' agree), 'improved their film culture' and strengthened their film knowledge (43% 'strongly' agree). Children's interest in film literacy is even stronger: some 85% said it helped raise their interest in cinema.

**50%**

The percentage of those people downloading or streaming films from free websites who say cinema tickets are too expensive

Some 68% of film viewers said they downloaded free files for storage on personal drives and 56% said they streamed films from free websites. Some 50% of those who do so say 'cinema tickets, VoD and DVD are too expensive', while 37% think 'some films are interesting but not worth paying for the cinema experience'. Other motivations include ease of access (31% consider 'many films are available online and they don't see the point in paying'), lack of availability (30% say that 'many films they want to see are not available in their country'), missed opportunities (28% say 'they didn't go when the film was on in the cinema and they can't wait for it to be available on DVD or on TV' while 23% say they 'don't have time to go to the cinema'). Some 11% of free downloaders say they stream and download because 'cinemas are too far away'.

### Why people are watching films

The key reasons to watch films include 'to entertain oneself and have fun' (96%), to 'spend some nice time with family or friends' (96%), 'to discover and learn about people and cultures' (90%) and to 'experience strong moments and emotions' (91%). The majority of film viewers generally look for information about films either 'when the films are released in theatres' (37%) or 'right before deciding to watch a film' (23%).

The two most important criteria are genre and story. After these come cast, familiarity with the protagonists and setting. Women pay more attention to genre or type of film and whether or not it is adapted from a book. The director and production values are more important to men while the setting and lead character are more important to young adults.

Young adults aged 16-25 are the most sensitive to film advertising and to recommendations from friends. For watching films on TV, prior knowledge and scheduling play a big role in choosing films, while with VoD, 'films I have already heard about' and the ability to search by genre are important.

Film-related social-media activities are widespread, and 5%-10% of the respondents regularly engage in the process. Some 60% of film viewers follow film-related accounts on social networks, including Facebook and Twitter.

A full 92% of young adults aged 16-25 years research films by watching trailers on video-sharing platforms such as YouTube and Dailymotion. Big-budget marketing campaigns, such as those for *Cloud Atlas* and *The Impossible*, with exclusive content and fully fledged social-media strategies, have the strongest impact.

Children are most aware of animated films, comedies, adventure films and franchises and films budgeted at more than $20m (€15m). Young adults naturally show higher awareness for teen movies and know most about films shot in English. They enjoy action, crime, fantasy and adventure. They also know a lot about franchises. Adults know more about — and enjoy more — films shot in their national language and dramas. They value genres including war, history and biography and know more about films with a budget less than $20m (€15m).

### Profiling the audience

'Hyper-connected movie addicts' (24% of European film viewers) are the heaviest viewers of media and films. They are typically 'digital natives', young, male and urban. They watch all sorts of films.

'Rushed independent movie selectives' (22% of European film viewers) are the second largest group in terms of film consumption, especially European films. They are typically working adults with few or no children, women aged 26-50 years earning average incomes but with a fairly high level of education and working in intellectual professions such as academia and teaching.

'Mainstream blockbuster lovers' (16% of European film viewers) are the third largest group. But unlike 'movie addicts' and 'movie selectives', they watch mainly US blockbusters and only few European films, live in less urban areas and have less access to cinemas.

'Occasional hit grazers' (21% of European film viewers) watch fewer films, and take less notice of media and culture in general. Instead, they watch TV, read some books, listen to music and surf the internet including social networks. They are typically younger, semi-urban or rural women going to school or in the middle of their studies. Despite watching fewer films, their interest in European films comes through as relatively strong.

'Movie indifferents' (16% of European film viewers) watch the fewest films. They are typically either young or older men, less educated, poorer, living in the most rural and semi-urban areas and the least equipped with media devices and services. They are little interested in film apart from action and comedy, and watch mostly US blockbusters.

### What are they watching?

Among the 24 genres proposed by this study, a minimum of 67% of film viewers say they watch nearly all genres but some only 'rarely'. When asked which types of films they would continue to see in cinemas if all films were available on any platform, audiences mentioned a variety of genres. 'Comedy' and 'action'/'blockbusters' come top, followed by 'science fiction', 'horror', 'adventure', 'fantasy', 'thriller' and 'animation', genres featuring strong visual settings and/or narrative dynamics.

'Drama', 'romance', 'historical films' and 'documentaries', were least cited.

Respondents praised the originality, creativity, innovation and diversity of European films, liked 'the variety of movies and genres', and appreciated the quality of content. When asked what they disliked about European cinema, they pointed primarily to a language issue ('foreign language', 'subtitles'). They also criticised stories ('boring', 'slow', 'heavy'), actors, production ('poor quality', 'low budget') and pointed to weaknesses in the promotion and distribution of European films. They generally agreed European films are 'less stereotypical than US films', 'feature diverse and complex characters' and are 'original and thought-provoking'.

Respondents liked US films primarily for their production values and actors. When asked about what they disliked about US productions, respondents primarily mentioned 'violence'.

In each country respondents were offered a list of selected films including national films, European films and US films. Respondents were asked if they knew each film (awareness), if they had seen it (viewing) and if they had liked it (satisfaction).

Recent national films, including both commercial hits and smaller arthouse movies, had typically been seen by 10%-25% of film viewers in their respective local markets. Recent European films had typically been seen by 10%-15%, while recent US films had typically been seen by 30%-50% of the population in each country. US films had the highest awareness, followed by national films, with European films ranking last.

The most successful national films had a very high level of awareness in their own countries. However the majority of national films, while achieving high awareness, were less attractive to mainstream audiences in their local markets. European films, on the other hand, had lower average awareness, but the gap between awareness and viewing was less.

A presence in festivals and prizes usually have no correlation with the general awareness of a movie (movies with high festival presence may fall into a specialist niche as far as the average viewer is concerned) though they can impact specific audiences — in particular film viewers with a higher education level and film expertise. S

**60%**
The percentage of film viewers who follow film- related accounts on social media networks

**40%**
The percentage of smartphone owners who watch films on the device

**11%**
The percentage of free downloaders who say they stream and download because 'cinemas are too far away'

# THE VIEWERS' DISCRETION

A far-reaching study to be discussed for the first time in detail at the Regional Forum reveals the eclectic viewing habits of Europeans. Geoffrey Macnab talks to experts about its findings

Welcome to the world of 'digital natives' and 'hyper-connected movie addicts'. The panel on day 2 (August 21) of the Regional Forum and Creative Europe — MEDIA conference brings together European experts to explore the different ways films reach spectators throughout Europe. The starting point is a far-reaching Film Audience Survey, which has been carried out across Europe by Headway International with Attentional and Harris Interactive on behalf of the European Commission.

At Cannes in May 2013, industry delegates were given a first glimpse of the study. There was a follow-up workshop in Brussels in December that year, and a presentation at International Film Festival Rotterdam in January 2014. Now, its finding are being debated in Sarajevo.

"The most surprising thing for me was the impact of film [on people]," notes Arnaud Dupont, managing director of Headway International, one of the authors of the report. "We asked many different questions regarding cultural habits and film was the number one activity. A full 97% of the respondents said they watched films."

UK-based Madeleine Probst, programme producer at Watershed, a cross-artform venue and producer, and forum panellist, is heartened by the results. "What this indicates is that there's a real appetite for watching films and that digital is enabling film watching and culture to be more accessible than ever," says Probst. "It also shows we're only beginning to grasp the extent to which access to vast amounts of content on a proliferating choice of platforms might affect audiences' perception of cinemas as places, cinema-going habits and the wider engagement with film."

The research, which took the form of an online survey of 4,608 Europeans aged between four and 50 in 10 countries (Croatia, Denmark, France, Germany, Italy, Lithuania, Poland, Romania, Spain and the UK), has mixed messages for European cinema. Respondents warmed to the "originality" and "variety" of European movies by comparison with more "stereotypical" Hollywood. However, there are also pointed remarks about the "boring", "slow", "heavy" nature and complex plotting of much of the European fare.

"Bear in mind there are quite a big number of people who don't like European films," says Dupont. "They have all these clichés about the films being boring, slow and focused on social topics."

But he also highlights the enthusiasm some respondents showed for European films. "The fact people think European films are dark and slow paced is not

'We have to fight for our audience. The solution is to use the possibilities offered by digital distribution'
**Jasmin Durakovic, DEPO**

'Audiences expect more from their investment of time and money. This creates opportunities for cinemas'
**Madeleine Probst, Watershed**

The Film Audience Survey gives a new insight into the film habits of committed cinefiles — such as those in Sarajevo — and more casual movie viewers

‘Dark and slow paced is not always a bad thing when it comes to European films’

**Arnaud Dupont, Headway International**

always a bad thing for them," he states. "The key point is that European films are different to US films."

This difference, Dupont suggests, should be celebrated; European cinema should provide an alternative to Hollywood rather than trying to imitate it.

The study includes some intriguing findings about film education. For example, some 43% of respondents 'watch or have watched films as part of a course of study at school, university or in adult education', while 87% of film viewers go to the cinema.

### Reaching fractured audiences

Panelist Dragoslav Zachariev of EuroVoD, a network of independent European VoD platforms, is looking forward to debating how small independent operators can use technology to reach a new and fractured digital audience. "Part of the industry is not open to experimentation because they fear this is the first sign of a major change," Zachariev suggests. "But they have to find ways of developing legal VoD offers that are respectful to the rest of the value chain. Our objective is to create strong brands, very well identified by users, that present us as a one-stop shop for independent films."

EuroVoD is active already in Poland and is looking to advance further into eastern Europe. One of its members is Austria-based online film portal Filmmit, whose CEO Karin Haager will also sit on the panel. Haager points to the practical benefits of the study for her business as she and her colleagues are now looking at different ways of marketing films to the various tribes identified in the study.

"You have to approach the 'occasional hit grazers' and 'movie indifferents' in a very different way to, say, the 'mainstream blockbuster lovers'," Haager says.

She was also intrigued by the study's insights into national differences in viewing habits. "For example, Twitter is used heavily by Spanish film lovers, but by contrast, Twitter is far less of a factor in German-speaking markets."

While this may be an era in which films are downloaded and watched on laptops, mobile phones and tablets, in certain parts of Europe, audiences rely on travelling cinemas to see movies. Southeast Europe in particular remains very under-screened, with around 60,000 people per screen in Bosnia. War, the subsequent break-up of the former Yugoslavia and the creation of six or seven much smaller film industries meant multiplex construction was not a priority and DVD and digital piracy is rife throughout the region. Travelling cinemas screening a mix of European and US fare, including Operation Kino, which involves Sarajevo Film Festival, has long been the way many Southeast European audiences have watched films. Significantly, Operation Kino also operates a VoD service.

Bosnia-based producer and director Jasmin Durakovic, who will also sit on the panel, is one of a number of influential figures in the region trying to "be part of the new game" in distributing content digitally and legally. His company, DEPO, distributes movies, TV series, documentaries and other video content to the Balkan diaspora across the world.

"We have to fight for our audience," he says "The solution is to use the possibilities that digital distribution offers."

### Forward thinking

The Reaching The Audience report provides a long-awaited tool with which the European film industry can investigate itself. For years, there have been complaints about the lack of data on audience habits. One question now is whether the research will continue. There is new European Commission leadership in place that will have to decide whether to follow up on the study. If it does, there are new areas to address. For example, the original survey group consisted of only 10 countries and its respondents were all under 50 years of age. Yet the 50-plus audience demographic is growing fast.

"We are moving into an environment where audiences expect more from their investment of time and money, whether it be event driven, experiential, participatory, curatorial or editorial." notes Probst. "This creates opportunities for cinemas that have an understanding of their audiences and are active with their online and social spaces." S

# *An eye to the future* film education in Europe

The creation of a pan-European film education policy will bring civic and economic benefits that will strengthen the film industry and, crucially, form the next generation of audiences, says writer Xavier Lardoux, deputy director of Unifrance, in this executive summary from the report 'For A European Film Education Policy'

Culture is at the very heart of the project that is the European Union, asserted Aurélie Filippetti, France's minister of culture and communication, in a speech at Cannes Film Festival in 2013. She proposed the development at the European level of provisions for arts and culture education in general and for film education in particular.

This inspired Frédérique Bredin, president of the Centre National du Cinéma et de l'Image Animée (CNC), to establish a commission tasked to investigate 'ways of accelerating the development of European film education initiatives'.

This report is the result of the work of the commission, which consulted some 100 people from 22 European countries between January and April 2014.

Given the proliferation and omnipresence of video screens of every kind, and their domination by the major US studios (especially in the viewing of young people and now even of children) the report stresses the political and economic necessity of a European film education policy. It emphasises the need to provide such education to all school students — from three to 18 years of age — if Europe is to develop, on an on-going basis, the audience of tomorrow and thus to consolidate the European film industry and strengthen the cultural exception.

> 'The chief platform for film education should be the school, not often the case across Europe'

In its implementation, any such policy must meet a number of requirements. On the premise that film should be treated as an art in its own right and not just as supporting material for other subjects, the report argues for an 'education in film' rather than an 'education in the visual image'. For film education is, in a way, the necessary precondition for any education in the visual image, learning how to look.

The report reaffirms that the chief platform for film education should be the school, not often the case across Europe. It is the school's mission to make knowledge democratically available to all, and this makes it possible to reach the greatest possible number of children, without

regard to financial or cultural barriers.

Referencing the work of US philosopher Martha Nussbaum (*Not for Profit: Why Democracy Needs the Humanities*, Princeton, NJ: Princeton University Press, 2010) the report argues film education must accord greater importance to the European dimension, for its cultural wealth and diversity, of course, but also in its civic aspect. To introduce young Europeans to the art of film is one of the ways of forming the citizens of tomorrow, citizens who will be led to pursue the European project.

The report offers a snapshot of film education initiatives in Europe, taken mainly from a study carried out by the British Film Institute (BFI) on behalf of the European Commission, published in July 2011. This describes, in general terms, the activities undertaken, distinguishing them by the time and place of their occurrence: at school in school time, at school but out of school time, or out of school.

It next considers the chief obstacles to film education in Europe today. In general, there is a lack of awareness of or attention to film education policy, at both European and national level. There is also a lack of reliable and useful statistics, and of appropriate pedagogical tools, of training courses for teachers in particular. Additionally, it is clear that funding is inadequate, at European, national and local levels. Finally the report recalls the key points of European film policy within the framework of the new Creative Europe programme (2014-20) and observes the adoption of any European film education policy at all is very recent (January 1, 2014). Although the introduction of such a policy is to be welcomed, it nonetheless remains of marginal importance — accounting for less than 1% of the MEDIA budget in 2014 — and needs to be strongly developed at the European level, as at the national and the local level.

The report attempts to catalogue those film education initiatives undertaken within the European Union which themselves have a European dimension. These are mostly initiatives and projects aimed at children and young people of between three and 18 years of age. To compile this list, more than a hundred people from 22 different EU countries were consulted, including the directors of national film centres, cultural counsellors and audiovisual attachés in the French diplomatic service (and the Institut Francais), and representatives of the European Commission. It also featured those running projects including institutions, television stations, film festivals and film exhibitors' associations, plus film-makers.

This consultation revealed some 50 initiatives with a European dimension. Although many were organised by country, particular attention was paid to bi-national or transnational projects from which lessons might be learnt, thus assisting the development of a consistent film education in Europe.

Six types of relevant activity are identified and the most successful projects are those that manage to combine several of these aspects. These are:

- Screenings during school time, often at the theatre, allowing school students to view classic or contemporary films that can be applied to their lessons, particularly in the teaching of foreign languages;
- Practical workshops in which young people produce films, from first idea to final cut;
- Events aimed specifically at the young, such as festivals, competitions and prizes that have been successfully developed over the last few years;
- Training courses established for teachers, theatre operators and community workers to enable them to communicate film culture to the young;
- The use of new media including dedicated websites, online video platforms and blogs, which are the increasingly favoured channels for film education;
- Twinning between organisations, cities and regions in Europe, which is becoming an increasingly common practice.

> 'In general there is a lack of awareness of or attention to film education policy, at both European and national level'

Based on these examples of European good practice, the report makes 10 recommendations:

- The creation of a European Foundation for Film Education;
- The creation of a video platform making European films available to children and young people;
- The large-scale development of film education activities that combine artistic and linguistic approaches;
- The establishment of a library of 20 European films, old and new, to be circulated throughout Europe for use in school time, both at theatres and at school;
- The development at the European and national levels of training in film education for teachers, theatre operators and community development workers, especially through the creation of a European film education website;
- To make European funding for distribution and exhibition more conditional on activities promoting film education;
- To encourage twinning between associations, cities and regions in Europe around the themes of film and film education;
- To establish an online festival of European film for children;
- To establish a proper European film prize for high school students;
- To make film education a regular feature of the European Capital of Culture programme.

## TAKING THE INITIATIVE

'For A European Film Eduction Policy' was presented to France's minister of culture and communication and to the presidents of Europe's national film centres, who met in Cannes on May 18, 2014. It will also to be presented to the new members of the European Commission and to the officials responsible for the Creative Europe programme, as well as the European Council of Ministers of Culture and to the most important figures in the field of cultural affairs in the European Parliament.


# THE YOUTH MOVEMENT

A pan-European film education policy would not only help develop future audiences but would invigorate the region's film industries. Geoffrey Macnab reports

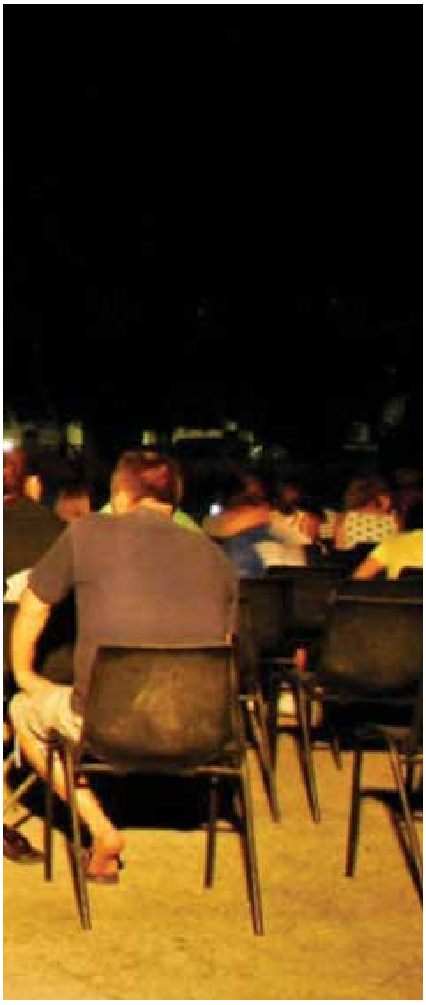
The third panel of the Regional Forum's MEDIA Conference on 'Reaching New Audiences for European Films' is poised to be a lively debate about how to develop the audience of tomorrow through a European-wide film literacy programme. It comes as the Bosnian film industry is lobbying for film to be included in the country's high-school curriculum.

The panel is inspired by the report 'For A European Film Education Policy', written by Xavier Lardoux, deputy director of Unifrance, who will sit on the panel. One reason for a strong European film education, says the report, is as a means of resisting Hollywood hegemony. The report contends school students aged from three to 18 need to be taught to regard film as an art in its own right. It suggests they should learn to appreciate the cultural worth and diversity of the European cinema tradition.

But as the report makes painfully clear, film education is still not taken very seriously across Europe. There are few training course in film education for teachers and funding is inadequate. The lack of "reliable and useful" statistics does not help either. The new Creative Europe programme may acknowledge the importance of film education but, even so, less than 1% of the MEDIA budget for 2014 is going to film education.

Lardoux has some radical proposals. He calls for the creation of a European Foundation for Film Education and advocates making European funding

(Above) Operation Kino's Punk Cinema, from Sarajevo Film Festival, is a year-round travelling cinema initiative that brings films to younger audiences



for distribution and exhibition more conditional on activities promoting film education.

"All the people interviewed for this report and all the case studies talk about the same thing — the need for audience development and for the development of future generations of cinema-goers," says Asja Makarevic, project manager at Sarajevo Film Festival's Talents and a panelist with Lardoux.

Sarajevo Film Festival itself already has various audience development initiatives in place. These include Teen Action, which gives teenagers from Bosnia and Herzegovina the chance to make short films, a film criticism initiative and Operation Kino's Punk Cinema, a year-round travelling cinema initiative where films are brought to younger audiences.

The festival's new I♥Cinema initiative is aimed at 40 film enthusiasts, aged 18-30, who are given access to festival screenings and debates. The aim is to trigger the curiosity of youngsters. "We want to enable them to be affected by the power of images," says Makarevic. "And to question the films they see and to realise they can become film-makers themselves."

The panel will see film education expert Ian Wall of The Film Space give a UK perspective on the direction of European film education policy. He underlines the need for the development of a film literacy programme to be conducted hand-in-hand with the industry itself, as well as the importance of monitoring film literacy initiatives to ensure they are of practical benefit. "What are the outcomes we really want?" Wall asks.

He suggests not all of the report's recommendations will be easy to achieve. "Establishing a library of 20 European films, old and new, to be circulated throughout Europe for use in school time, both at theatres and at school is likely to be a real challenge," he says. "We could spend a year arguing about that. There's only 20. What about countries that won't be represented?"

For Wall, a vital element of any film literacy strategy is effective teacher training. "In the long run, without the teachers, you haven't got a chance. European film will still be marginalised," he says.

**Wider appeal**

One of the report's encouraging findings is the evidence that film education does broaden audience appetite.

"At Watershed and in cinemas across the Europa Cinemas Network, we're very aware of this and focussed on the importance of thinking creatively about developing the next generation of cinema-goers and makers," says Madeleine Probst, panellist and programme producer at the UK's Watershed, a cross-artform venue and producer, and the vice-president of Europa Cinemas.

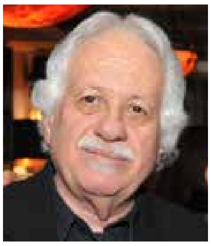
To this end, Europa Cinemas' Audience Development Innovation Lab in Bologna, which marks its 10th anniversary this year, provides a research and development space for cinemas to collectively evolve responsive and practical strategies for dealing with an increasingly disruptive and dynamic film exhibition environment.

Europe could also look towards Israel for inspiration around film education.

Regional Forum adviser Katriel Schory, producer and executive director of Israel Film Fund, says a film education policy has helped to galvanise Israeli film culture. He points to the late 1990s, when there was little public funding for Israeli films and local audiences were disinterested in the ones that were produced. In order to revive a near-moribund industry, it was necessary to "reach out and start all over again", explains Schory. Film education was the bedrock of a new film policy.

'We want to enable young people to be affected by the power of images and realise they can become film-makers'

**Asja Makarevic, Sarajevo Film Festival's Talent Campus**



'In exactly the way we learned to analyse a poem, students learn how to analyse movies'

**Katriel Schory, Israel Film Fund**

"You have to create a welcoming environment for your product," says Schory. "We didn't wait for people to come to the cinemas. We reached out. We went out to the regions. We developed endless schemes going with our movies to the audiences in order to gain their confidence again."

Israel Film Fund struck a deal with 25 cultural centres around the country to preview Israeli movies, and every school in the country has a budget for art and cultural activities, including film screenings. High-school students can also study film and production. "This means there are small studios with lights and cameras on one hand and, on the other hand, there are two years of studying film, analysing, understanding the language," says Schory. "In exactly the way we learned to analyse a poem, they learn how to analyse movies."

Another innovative Israeli initiative is called 'Lunchtime at the Movies' and encourages factory bosses to hold lunchtime screenings of new Israeli movies for their employees. "I told them, 'It's a loss of maybe two hours of work which, of course, is money but you come out as an enlightened CEO'," says Schory. "For us, we reach out to audiences to show them that Israeli cinema is good."

"One thing is clear," Schory underlines. "We do not sit and wait. We go with our movies. We are out there all the time."

While Sarajevo Film Festival has long organised its own film literacy workshops and initiatives that reach out to younger film-goers, it believes more should be done to cultivate and nurture the audiences of tomorrow. "We feel there should be a public policy, governmental action and public education assistance," says Jovan Marjanovic, Sarajevo's head of industry.

"What we're trying to do within the festival is related to schools but I think this collaboration should be even stronger. There's much more that could be done." S

# BEYOND EUROPE

The Regional Forum will explore how European film-makers can forge international relationships and open up new markets to build on existing co-production partnerships. By Geoffrey Macnab

Yorgos Lanthimos's The Lobster is a Greece-UK-Ireland-Netherlands-France co-production

One of the biggest talking points at the Regional Forum's MEDIA conference is set to be the launch of the much-anticipated Sarajevo City of Film Fund, aimed at galvanising co-production between Southeast Europe and international partners. Backed by the European Commission's new international co-production programme, the fund will be administered by Sarajevo Film Festival.

"The fund will receive €250,000 [$336,000] in EC support over the next 18 months or so," says Jovan Marjanovic, head of industry at Sarajevo Film Festival. Additional funding will come from Croatian multinational consumer goods production and distribution company Atlantic Grupa and further public sources.

The conference will reveal more about how the fund will fit into the international co-production jigsaw. "We're looking at Southeast Europe and the former Yugoslavia on one side and Middle East and North Africa, the Americas, India and the Far East on the other as our primary markets," says Marjanovic.

The Southeast European markets of Bosnia, Croatia and Serbia routinely co-produce with each other, as well as with other European territories, particularly France and Germany. Recent collaborations include Danis Tanovic's *An Episode In The Life Of An Iron Picker* (Bosnia-France), Faruk Loncarevic's *With Mom* (Bosnia-Slovenia-Germany) and Jasmila Zbanic's *For Those Who Can Tell No Tales* (Bosnia-Germany).

The original data collated for the forum reveals co-production activity in the region is high although total production levels remain low compared to other European territories. Most of the films made in Southeast Europe in 2013 were financed as European co-productions.

"Our position is, the more the merrier," says Sanja Ravlic, head of co-productions at the Croatian Audiovisual Centre, of the new Sarajevo Fund. "We are constantly co-producing. There's no film coming out of any of the ex-Yugoslav countries that hasn't been made with money from the other countries."

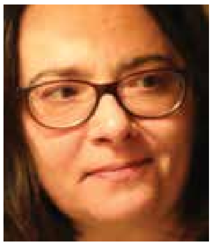
The new fund's aim is to make Southeast European producers attractive minority partners to potential collaborators beyond the usual co-production suspects. There is a particular emphasis on developing relationships from outside Europe and particularly with Qatar, India and Mexico. There are projects from all these territories in Sarajevo's CineLink co-production market.

"For small territories, co-producing with any territory other than through the usual coproduction schemes is very difficult," says Marjanovic. "There are no bilateral treaties. We can't pursue a policy of signing bilateral treaties with everybody in the world, like France can. And we don't have English-speaking territories overseas with whom to partner, like the UK has."

This panel at the Regional Forum comes as Eurimages, the Council of Europe's co-production fund, looks to expand outside Europe and potentially to grant associate membership status to non-Europeans. Its aim is to make it easier for countries to co-produce through a new convention without having to go to the lengths of striking a bilateral treaty.

Marjanovic cites the example of Bosnia and Mexico. There would be little point in a small country such as Bosnia going through the formalities required to make a treaty with Mexico. Nonetheless, both countries would benefit if they were able to work together more easily.

"Can we imagine Carlos Reygadas' next film being co-produced by Bosnia? Easily! But that might be a problem without a treaty," says Marjanovic.



'There's no film coming out of any of the ex-Yugoslav countries that hasn't been made with money from the other countries'

**Sanja Ravlic, Croatian Audiovisual Centre**

Indeed, Mariana Cerrilla Noriega of Mexico's IMCINE film institute, is one of a wide range of international guests at the forum's MEDIA conference who will discuss different perspectives on international co-production and showcase the new opportunities that now exist beyond Europe.

Sarajevo Film Festival also has close links with Qatar's Doha Film Institute, which backed Zbanic's *For Those Who Can Tell No Tales*. Representatives from Doha are expected at the forum.

And the festival has a special focus on the UK this year. Isabel Davis, head of international at the British Film Institute (BFI), will join Marjanovic, Noriega and Ravlic on the international co-production panel. Although the UK is not a member of Eurimages, UK producers have a huge range of European and international partners, including from North America and Australia. The BFI's new minority co-production fund recently boarded Greek director Yorgos

For Those Who Can Tell No Tales

‘Southeast Europe is really punching above its weight in talent terms and that makes it very attractive’

**Isabel Davis, British Film Institute**

Lanthimos’s *The Lobster*, which is set up as a Greece-UK-Ireland-Netherlands-France co-production. Significantly, the changes to the UK’s Film Tax Relief — which have reduced the required minimum UK expenditure from 25% to 10% — have also made the UK a much more attractive co-production partner.

Davis explains the UK’s approach to co-production is often talent-driven. “Cultural exchange is part of the co-production relationship,” she says. “For British producers, it’s nice to be surprised where the next really interesting film-maker is coming from and how that person might want to engage with the UK.”

### Fund fare

The Sarajevo City of Film Fund is being given a soft launch at Sarajevo Film Festival with an emphasis on networking and enabling producers to create new working relationships. Some local film-makers are extraordinarily inventive in how they put together their movies and the hope is they will now inspire others. For example, Oscar winner Danis Tanovic has worked with French, Polish and US collaborators. He shot his recent feature, *White Lies*, in India.

While few producers would say co-producing is easy or that new funding opportunities can transform instantly the fortunes of a film region such as Southeast Europe, there is a consensus the time is right for change.

“At the moment, Southeast Europe is really punching above its weight in talent terms and that makes it very attractive,” says Davis. “ Sarajevo Film Festival has proved itself a really interesting platform. It’s a fantastic, very well attended event. There’s no reason at all to think a film that has originated out of Southeastern Europe territories shouldn’t aspire to find a larger audience than is available in its own territory.” S

An Episode In The Life Of An Iron Picker

With Mom

# CO-PRODUCTION BUILDING INTERNATIONAL TIES

M **MAJORITY PARTNER** X **MINORITY PARTNER** **TERRITORIES IN SOUTHEAST EUROPE** **TERRITORIES OUTSIDE SOUTHEAST EUROPE**

**OFFICIAL CO-PRODUCTIONS ORIGINATED IN AT LEAST ONE OF THE COUNTRIES OF SOUTHEAST EUROPE ***

| TITLE | ALBANIA | AUSTRIA | BOS & HERZ | BULGARIA | CROATIA | CYPRUS | GEORGIA | GREECE | HUNGARY | KOSOVO | MACE-DONIA | MONTE-NEGRO | ROMANIA | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| ADA | M | | | | | | | | | | | | | |
| FEMRAT | X | | | | | | | | | | | | | |
| I'M NOT FAMOUS BUT I'M AROMANIAN | X | | | | | | | X | | | X | | M | |
| PARADISE: HOPE | | M | | | | | | | | | | | | |
| ALPHABET | | M | | | | | | | | | | | | |
| EVERYDAY REBELLION | | M | | | | | | | | | | | | |
| SICKFUCKPEOPLE | | M | | | | | | | | | | | | |
| THE LAST OF THE UNJUST | | X | | | | | | | | | | | | |
| THE NOTEBOOK | | X | | | | | | | M | | | | | |
| GRAND CENTRAL | | X | | | | | | | | | | | | |
| THE STATION | | M | | | | | | | | | | | | |
| WITH MOM | | | M | | | | | | | | | | | |
| AN EPISODE IN THE LIFE OF AN IRON PICKER | | | M | | | | | | | | | | | |
| FOR THOSE WHO CAN'T TELL NO TALES | | | M | | | | | | | | | | | |
| ADRIA BLUES | | | X | | X | | | | | | | | | |
| FALSIFIER | | | X | | X | | | | | | | | | |
| A STRANGER | | | X | | M | | | | | | | | | |
| SOUTHERN SCUM GO HOME! | | | X | | | | | | | | | | | |
| THE PRIEST'S CHILDREN | | | | | M | | | | | | | | | |
| DUAL | | | | | X | | | | | | | | | |
| CIRCLES | | | | | X | | | | | | | | | |
| GOOD TO GO | | | | | X | | | | | | | | | |
| BLOCK 12 | | | | | | M | | X | | | | | | |
| PIANO ROOM | | | | | | | | | | | M | | | |
| BALKAN IS NOT DEAD | | | | | | | | | | | M | | | |
| MAMAROSH | | | | | | | | | X | | | | | |
| WITHERING | | | | | | | | | | | | | | |
| ZORAN, MY NEPHEW THE IDIOT | | | | | | | | | | | | | | |
| DZMA | | | | | | | M | | | | | | | |
| BRIDES | | | | | | | M | | | | | | | |
| TANGERINES | | | | | | | X | | | | | | | |
| CORN ISLAND | | | | | | | M | | | | | | | |
| EPIC | | | | | | | M | | | | | | | |
| PARAJANOV | | | | | | | X | | | | | | | |
| GONE BACK | | | | | | | | | | X | | | | |
| DASHURIA E BJESHKEVE TE NEMUNA 2 | X | | | | | | | | | M | | | | |
| JIN | | | | | | | | | | | | | | |
| MAHMUT AND MERYEM | | | | | | | | | | | | | | |
| LOVE ME | | | | | | | | | | | | | | |
| LIFELONG | | | | | | | | | | | | | | |
| MOLD | | | | | | | | | | | | | | |
| SAROYAN LAND | | | | | | | | | | | | | | |
| YOZGAT BLUES | | | | | | | | | | | | | | |
| THE NOTEBOOK | | X | | | | | | | M | | | | | |
| CLOSER TO THE MOON | | | | | | | | | | | | | M | |
| DOMNUL DE LA CURTE | | | | | | | | | | | | | M | |
| MATEI CHILD MINER | | | | | | | | | | | | | M | |
| LUPU | | | | | | | | | | | | | M | |
| WHEN EVENING FALLS ON BUCHAREST OR METABOLISM | | | | | | | | | | | | | M | |
| CANIBAL | | | | | | | | | | | | | X | |
| A VERY UNSETTLED SUMMER | | | | | | | | | | | | | X | |
| A LOVE STORY, LINDENFELD | | | | | | | | | X | | | | M | |
| RECYCLING MEDEA | | | | | | | | X | | | | | | |
| ON BOTH SIDES OF THE AEGEAN | | | | | | | | M | | | | | | |
| SEPTEMBER | | | | | | | | X | | | | | | |
| LUTON | | | | | | | | M | | | | | | |
| BEFORE MIDNIGHT | | | | | | | | X | | | | | | |

* Films that made their world premiere in 2013

**National film centre sources** Albanian National Center of Cinematography **Austrian Film Commission** Bulgarian National Film Center **Croatian Audiovisual Centre** Cyprus Ministry of Education and Culture **Georgian National Film Center** Greek Film Centre **Hungarian National Film Fund** Kosovo Cinematography Center **Macedonian Film Agency** Montenegro Ministry of Culture **Slovenian Film Centre** Ankara Cinema Association **Romanian Film Promotion** Film Fund Sarajevo **Film Center Serbia**

| | SERBIA | SLOVENIA | TURKEY | ARMENIA | AZERB-AIJAN | SWITZER-LAND | CZECH REPUBLIC | GERMANY | DENMARK | ESTONIA | SPAIN | FRANCE | UNITED KINGDOM | ITALY | KAZAKH-STAN | NETHER-LANDS | POLAND | RUSSIAN FEDERATION | SWEDEN | UKRAINE | UNITED STATES |
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# SOUTHEAST EUROPE: THE STATS

■ OVERVIEW ■ CINEMA ADMISSIONS ■ VoD (FILM + TV) PENETRATION ■ INHABITANTS PER SCREEN ■ INTERNET PENETRATION ■ FEATURE PRODUCTION

These figures collated by Sarajevo Film Festival's Statistics and Analysis Office, with information provided by individual national film centres and institutions, provide a fascinating and detailed overview of the 16 very diverse film territories of Southeast Europe.

The biggest industry by far is Turkey, with 85 films produced, an annual box-office gross of €174.2m and admissions of 50.4 million in 2013. It is also the most populous country with a population of 76.7 million and its national films command an impressive market share of 53.6%.

Austria (€132m), Greece (€59.3m) and Hungary (€45.4m) boast the next biggest box-office markets by annual cumulative ticket sales, and are also the next three biggest markets by film production levels – 54, 69, and 85 respectively in 2013.

Bulgaria, meanwhile, showed impressive box-office growth in 2013 with annual ticket sales rising 19% year on year to €20.5m and admissions increasing 16.8% to 4.8 million. However feature production fell to eight features, from 36 in 2012.

**OVERVIEW – NUMBER OF FILMS PRODUCED / AVERAGE BUDGET / PUBLIC FUNDING AVAILABLE**

| | 2010 | 2012 | 2013 |
|---|---|---|---|
| **ALBANIA** | | | |
| Number of films produced | 3 | 7 | 7 |
| Average budget (€) | 700,000 | 800,000 | 580,000 |
| Public funding available for all film-related activity (€) | 622,000 | 600,000 | 680,000 |
| **AUSTRIA** | | | |
| Number of films produced | 45 | 52 | 54 |
| Average budget (€) | 2.5m | 1.79m | 1.8m |
| Public funding available for all film-related activity (€) | 37.05m | 47.26m | 68m |
| **BULGARIA** | | | |
| Number of films produced | 22 | 36 | 8 |
| Average budget (€) | 800,000 | 971,500 | 932,000 |
| Public funding available for all film-related activity (€) | 4.16m | 6.19m | 6.49m |
| **BOSNIA & HERZEGOVINA** | | | |
| Number of films produced | 5 | 2 | 10 |
| Average budget (€) | 1.5m | 1.3m | 750,000 |
| Public funding available for all film-related activity (€) | 1.25m | 1.2m | 1m |
| **CROATIA** | | | |
| Number of films produced | 11 | 32 | 29 |
| Average budget (€) | 900,000 | 1m | 1m |
| Public funding available for all film-related activity (€) | 5.9m | 6.8m | 8m |
| **CYPRUS** | | | |
| Number of films produced | 2 | 4 | 2 |
| Average budget (€) | 800,000 | n/a | 850,000 |
| Public funding available for all film-related activity (€) | 1.5m | 1m | 700,000 |
| **GEORGIA** | | | |
| Number of films produced | n/a | 12 | 16 |
| Average budget (€) | n/a | 400,000 | 1.23m |
| Public funding available for all film-related activity (€) | n/a | 2m | 2.01m |
| **GREECE** | | | |
| Number of films produced | 26 | 44 | 69 |
| Average budget (€) | 450,000 | 450,000 | 450,000 |
| Public funding available for all film-related activity (€) | n/a | 2m | n/a |
| **HUNGARY** | | | |
| Number of films produced | 36 | 27 | 85 |
| Average budget (€) | 1.3m | n/a | 1.8m |
| Public funding available for all film-related activity (€) | 7.5m | n/a | 17.6m |
| **KOSOVO** | | | |
| Number of films produced | 2 | 4 | 8 |
| Average budget (€) | 200,000 | n/a | 350,000 |
| Public funding available for all film-related activity (€) | 450,000 | n/a | 700,000 |
| **MACEDONIA** | | | |
| Number of films produced | 7 | 4 | 2 |
| Average budget (€) | 1.2m | n/a | 5.1m |
| Public funding available for all film-related activity (€) | 1.79m | 3.6m | 5.1m |
| **MONTENEGRO** | | | |
| Number of films produced | 5 | 8 | 2 |
| Average budget (€) | 350,000 | n/a | n/a |
| Public funding available for all film-related activity (€) | 450,000 | n/a | 178,500 |
| **ROMANIA** | | | |
| Number of films produced | 19 | 26 | 30 |
| Average budget (€) | 800,000 | n/a | n/a |
| Public funding available for all film-related activity (€) | 20m | 19m | n/a |
| **SERBIA** | | | |
| Number of films produced | 24 | 27 | 20 |
| Average budget (€) | 700,000 | 700,000 | 700,000 |
| Public funding available for all film-related activity (€) | 3.5m | 3m | 3m |
| **SLOVENIA** | | | |
| Number of films produced | 7 | 8 | 24 |
| Average budget (€) | 1.1m | 709,245 | 1m |
| Public funding available for all film-related activity (€) | 7.23m | 4.76m | 3.86m (for 2014) |
| **TURKEY** | | | |
| Number of films produced | 66 | 61 | 85 |
| Average budget (€) | 600,000 | n/a | 400,000 |
| Public funding available for all film-related activity (€) | 2.7m | 8.5m | 3.23m |

**Sources** National Film Centres, OBS, various sources

## BY THE NUMBERS

Digital screens, cumulative box office, cinema attendance plus an overview of Southeast Europe 2013

» From page 16

## FACT SHEETS BY TERRITORY

The inside info on the Southeast European territories, including contact details at Sarajevo Film Festival

» From page 17

## SUBSCRIPTIONS



### CINEMA ADMISSIONS PER INHABITANT

| | 2009 | 2010 | 2011 | 2012 | 2013 | 2012-13 % change |
|---|---|---|---|---|---|---|
| ALBANIA | n/a | n/a | n/a | n/a | n/a | → 0% |
| AUSTRIA | 2.2 | 2.06 | 1.99 | 1.87 | 2.17 | ↑ 16% |
| BOSNIA & HERZEGOVINA | 0.12 | 0.18 | 0.13 | 0.21 | 0.19 | ↓ -8.79% |
| BULGARIA | 0.42 | 0.54 | 0.64 | 0.55 | 0.65 | ↑ 18.46% |
| CROATIA | 0.8 | 0.76 | 0.81 | 0.9 | 0.91 | ↑ 0.73% |
| CYPRUS | 1.06 | 1.02 | 1.01 | 1.07 | 0.73 | ↓ -31.78% |
| GEORGIA | n/a | n/a | n/a | 0.13 | 0.13 | → 0% |
| GREECE | 1.09 | 1.04 | 0.97 | 0.92 | 0.85 | ↓ -7.86% |
| HUNGARY | 1.06 | 1.1 | 0.98 | 1 | 1.02 | ↑ 2% |
| KOSOVO | n/a | n/a | n/a | 0.02 | 0.03 | ↑ 50% |
| MACEDONIA | 0.04 | 0.08 | 0.06 | 0.10 | 0.04 | ↓ -60.32% |
| MONTENEGRO | n/a | n/a | 0.44 | 0.36 | 0.35 | ↓ -1.89% |
| ROMANIA | 0.25 | 0.3 | 0.34 | 0.44 | 0.45 | ↑ 2.67% |
| SERBIA | n/a | n/a | 0.28 | 0.35 | 0.33 | ↓ -6.7% |
| SLOVENIA | 1.3 | 1.41 | 1.41 | 1.33 | 1.13 | ↓ -15.24% |
| TURKEY | 0.51 | 0.56 | 0.57 | 0.58 | 0.66 | ↑ 13.62% |
| EU 28 AVG | | | | 1.85 | 1.79 | ↓ -3.24% |

### VOD (FILM + TV) PENETRATION

| | 2010 | 2011 | 2012 | 2013 | 2012-13 % change |
|---|---|---|---|---|---|
| ALBANIA | 1 | 1 | 1 | 3 | ↑ 200% |
| AUSTRIA | 9 | n/a | 31 | 31 | → 0% |
| BULGARIA | 2 | 2 | 7 | 7 | → 0% |
| BOSNIA & HERZEGOVINA | 3 | 3 | 4 | 4 | → 0% |
| CROATIA | 1 | 2 | 5 | 19 | ↑ 280% |
| CYPRUS | 2 | 2 | 7 | 5 | ↓ -28.57% |
| GEORGIA | n/a | 1 | 1 | 3 | ↑ 200% |
| GREECE | 1 | n/a | 7 | 3 | ↓ -57.14% |
| HUNGARY | 5 | n/a | 7 | n/a | n/a |
| KOSOVO | 0 | 0 | 0 | 0 | → 0% |
| MACEDONIA | 2 | 1 | 1 | 1 | → 0% |
| MONTENEGRO | 1 | 1 | 1 | 1 | → 0% |
| ROMANIA | 3 | n/a | 9 | n/a | n/a |
| SERBIA | 2 | 2 | 2 | 3 | ↑ 50% |
| SLOVENIA | 3 | 4 | 3 | 9 | ↑ 200% |
| TURKEY | 2 | n/a | 8 | 8 | → 0% |

### INHABITANTS PER SCREEN

| | 2009 | 2010 | 2011 | 2012 | 2013 | 2012-13 % change |
|---|---|---|---|---|---|---|
| ALBANIA | n/a | n/a | n/a | 235,165 | 180,195 | ↓ -23.38% |
| AUSTRIA | 14,515 | 14,391 | 14,633 | 14,594 | 15,003 | ↑ 2.8% |
| BOSNIA & HERZEGOVINA | 97,600 | 97,425 | 97,250 | 38,050 | 128,129 | ↑ 236.74% |
| BULGARIA | 74,154 | 52,639 | 53,096 | 45,743 | 44,906 | ↓ -1.83% |
| CROATIA | 41,362 | 37,391 | 28,283 | 29,390 | 27,973 | ↓ -4.82% |
| CYPRUS | 26,424 | 27,089 | 24,629 | 19,149 | 24,774 | ↑ 29.37% |
| GEORGIA | n/a | n/a | n/a | 490,111 | 544,444 | ↑ 11.09% |
| GREECE | 22,610 | 23,271 | 22,902 | 21,938 | 22,438 | ↑ 2.28% |
| HUNGARY | 24,015 | 25,280 | 25,220 | 23,750 | 29,118 | ↑ 22.6% |
| KOSOVO | n/a | n/a | n/a | 1.8m | 850,000 | ↓ -52.86% |
| MACEDONIA | 114,000 | 102,800 | 89,522 | 69,759 | 77,692 | ↑ 11.37% |
| MONTENEGRO | n/a | n/a | n/a | 32,633 | 34,639 | ↑ 6.15% |
| ROMANIA | 117,924 | 110,380 | 88,613 | 72,135 | 75,758 | ↑ 5.02% |
| SERBIA | n/a | n/a | n/a | 57,886 | 61,380 | ↑ 6.04% |
| SLOVENIA | 19,874 | 19,341 | 18,518 | 18,700 | 18,382 | ↓ -1.7% |
| TURKEY | 38,720 | 37,461 | 35,702 | 38,215 | 35,331 | ↓ -7.55% |
| EU 28 AVG | | | | 17,229 | 16,890 | ↓ -1.97% |

### INTERNET PENETRATION

| | 2010 | 2011 | 2012 | 2013 | 2012-13 % change |
|---|---|---|---|---|---|
| ALBANIA | 43.5% | 48.1% | 49% | 61% | ↑ 24.49% |
| AUSTRIA | 74.8% | 78.7% | 79.8% | 81% | ↑ 1.5% |
| BULGARIA | 47.5% | 48.8% | 51% | 55.1% | ↑ 8.04% |
| BOSNIA & HERZEGOVINA | 31.2% | 42.3% | 60% | 65.4% | ↑ 9% |
| CROATIA | 50% | 59.2% | 70.7% | 71% | ↑ 0.42% |
| CYPRUS | 41% | 52.2% | 57.7% | 61% | ↑ 5.72% |
| GEORGIA | 28.3% | 35.3% | 45.5% | 45.5% | → 0% |
| GREECE | 46% | 46.2% | 53% | 59.9% | ↑ 13.02% |
| HUNGARY | 59.3% | 65.3% | 65.4% | 74.4% | ↑ 13.73% |
| KOSOVO | 21.5% | 20.7% | 20.5% | 76.6% | ↑ 273.66% |
| MACEDONIA | 51% | 56.7% | 56.7% | 63.1% | ↑ 11.29% |
| MONTENEGRO | 43.7% | 49.6% | 50% | 56.8% | ↑ 13.6% |
| ROMANIA | 35.5% | 40.2% | 44.1% | 51.7% | ↑ 17.14% |
| SERBIA | 55.9% | 56.2% | 56.4% | 55.8% | ↓ -1.06% |
| SLOVENIA | 64.8% | 71% | 72.1% | 74% | ↑ 2.64% |
| TURKEY | 45% | 44.4% | 45.7% | 46.3% | ↑ 1.31% |

# BY THE NUMBERS

## NUMBER OF FEATURE FILMS PRODUCED

| | 2009 | 2010 | 2011 | 2012 | 2013 | 2012-13 % change |
|---|---|---|---|---|---|---|
| ALBANIA | 4 | 3 | 10 | 7 | 7 | → 0% |
| AUSTRIA | 34 | 45 | 59 | 52 | 54 | ↑ 3.85% |
| BOS & HERZ | 6 | 5 | 9 | 2 | 10 | ↑ 400% |
| BULGARIA | 19 | 22 | 21 | 36 | 8 | ↓ -77.78% |
| CROATIA | 13 | 11 | 19 | 32 | 29 | ↓ -9.38% |
| CYPRUS | 3 | 2 | 4 | 4 | 2 | ↓ -50% |
| GEORGIA | n/a | n/a | n/a | 12 | 16 | ↑ 33.33% |
| GREECE | 25 | 18 | 28 | 44 | 69 | ↑ 56.82% |
| HUNGARY | 27 | 36 | 44 | 27 | 85 | ↑ 214.81% |
| KOSOVO | 2 | 3 | 3 | 4 | 8 | ↑ 100% |
| MACEDONIA | 9 | 7 | 7 | 4 | 2 | ↓ -50% |
| MONTENEGRO | 1 | 5 | 6 | 8 | 2 | ↓ -75% |
| ROMANIA | 18 | 21 | 27 | 26 | 30 | ↑ 15.38% |
| SERBIA | 25 | 24 | 26 | 27 | 20 | ↓ -25.93% |
| SLOVENIA | 6 | 7 | 16 | 8 | 24 | ↑ 200% |
| TURKEY | 69 | 66 | 74 | 61 | 85 | ↑ 39.34% |

## DIGITAL SCREENS AS A PERCENTAGE OF TOTAL SCREENS

| | 2009 | 2010 | 2011 | 2012 | 2013 | 2012-13 % change |
|---|---|---|---|---|---|---|
| ALBANIA | n/a | n/a | n/a | 58% | 88% | ↑ 51.72% |
| AUSTRIA | 41% | 52% | 68% | 68% | 79% | ↑ 16.18% |
| BOS & HERZ | 3% | 8% | 18% | 57% | 79% | ↑ 38.6% |
| BULGARIA | 23% | 41% | 56% | 78% | 96% | ↑ 23.08% |
| CROATIA | 7% | 8% | 58% | 68% | 95% | ↑ 39.71% |
| CYPRUS | 19% | 48% | 51% | 60% | 49% | ↓ -18.33% |
| GEORGIA | n/a | n/a | n/a | 78% | 89% | ↑ 14.1% |
| GREECE | 6% | 12% | 15% | 24% | 30% | ↑ 25% |
| HUNGARY | 7% | 14% | 40% | 75% | 86% | ↑ 14.67% |
| KOSOVO | n/a | n/a | n/a | n/a | 100% | n/a |
| MACEDONIA | n/a | n/a | n/a | 90% | 96% | ↑ 6.67% |
| MONTENEGRO | n/a | n/a | n/a | 33% | 33% | → 0% |
| ROMANIA | 22% | 31% | 46% | 52% | 86% | ↑ 65.38% |
| SERBIA | n/a | n/a | n/a | 20% | 26% | ↑ 30% |
| SLOVENIA | 9% | 15% | 15% | 16% | 45% | ↑ 181.25% |
| TURKEY | 3% | 10% | 13% | 16% | 66% | ↑ 312.5% |
| EU 28 AVG | | | | 74% | 87% | ↑ 17.57% |

## CUMULATIVE BOX OFFICE (€m)

| | 2009 | 2010 | 2011 | 2012 | 2013 | 2012-13 % change |
|---|---|---|---|---|---|---|
| ALBANIA | n/a | n/a | n/a | n/a | n/a | n/a |
| AUSTRIA | 181.6 | 115.54 | 136.44 | 124.32 | 132 | ↑ 6.2% |
| BOS & HERZ | 1.11 | 1.79 | 1.31 | 2.02 | 2.01 | ↓ -0.5% |
| BULGARIA | 11.95 | 17.32 | 20.1 | 17.19 | 20.46 | ↑ 19% |
| CROATIA | 11.69 | 11.25 | 14.17 | 14.83 | 15.53 | ↑ 4.7% |
| CYPRUS | n/a | n/a | n/a | 7.62 | 4.9 | ↓ -35.7% |
| GEORGIA | n/a | n/a | n/a | 2.4 | 2.27 | ↑ -5.2% |
| GREECE | 101.25 | 93.2 | 99.72 | 79.82 | 59.3 | ↓ -25.7% |
| HUNGARY | 45.2 | 42.96 | 41.12 | 44.2 | 45.4 | ↑ 2.7% |
| KOSOVO | 0.086 | 0.067 | n/a | 0.12 | 0.22 | ↑ 82.9% |
| MACEDONIA | n/a | n/a | n/a | 0.51 | 0.12 | ↓ -76% |
| MONTENEGRO | 0.75 | 0.79 | n/a | 0.77 | 0.76 | ↓ -0.5% |
| ROMANIA | 20.56 | 24.77 | 31.57 | 32.49 | 35.8 | ↑ 10.2% |
| SERBIA | 4.28 | 3.03 | 5.54 | 7.08 | 6.93 | ↓ -2.2% |
| SLOVENIA | 11.76 | 12.81 | 13.94 | 12 | 11.09 | ↓ -7.6% |
| TURKEY | 164.82 | 188.81 | 183.8 | 165.06 | 174.23 | ↑ 5.6% |
| EU 28 | | | | 6.4bn | 6.29bn | ↓ -1.72% |

## CINEMA ADMISSIONS (MILLIONS)

| | 2009 | 2010 | 2011 | 2012 | 2013 | 2012-13 % change |
|---|---|---|---|---|---|---|
| ALBANIA | n/a | n/a | n/a | n/a | n/a | n/a |
| AUSTRIA | 18.4 | 17.3 | 16.5 | 16.3 | 16.4 | ↑ 0.61% |
| BOS & HERZ | 0.45 | 0.72 | 0.5 | 0.8 | 0.77 | ↓ -3.75% |
| BULGARIA | 3.2 | 3.9 | 4.7 | 4.1 | 4.79 | ↑ 16.83% |
| CROATIA | 3.29 | 3.29 | 3.3 | 3.88 | 3.90 | ↑ 0.52% |
| CYPRUS | 0.87 | 0.85 | 0.87 | 0.9 | 0.63 | ↓ -30% |
| GEORGIA | n/a | n/a | n/a | 0.6 | 0.65 | ↑ 8.33% |
| GREECE | 12.3 | 11.7 | 10.8 | 10.1 | 9.2 | ↓ -8.91% |
| HUNGARY | 10.6 | 11 | 9.8 | 9.5 | 10.15 | ↑ 6.84% |
| KOSOVO | 0.028 | 0.022 | 0.022 | 0.04 | 0.05 | ↑ 25% |
| MACEDONIA | n/a | n/a | 0.2 | 0.2 | 0.08 | ↓ -60% |
| MONTENEGRO | 0.3 | 0.24 | 0.27 | 0.22 | 0.22 | → 0% |
| ROMANIA | 5.3 | 6.5 | 7.2 | 8.3 | 9.05 | ↑ +9.04% |
| SERBIA | 1.71 | 2.1 | 2.0 | 2.52 | 2.37 | ↓ -5.95% |
| SLOVENIA | 2.8 | 2.9 | 2.9 | 2.74 | 2.34 | ↓ -14.6% |
| TURKEY | 36.9 | 41.5 | 42.3 | 43.9 | 50.41 | ↑ 14.83% |
| | | | | 946 | 907 | ↓ -4.12% |

## SOUTHEAST EUROPE — AN OVERVIEW 2013

| COUNTRY | POPULATION | GDP PER CAPITA | ADMISSIONS (IN MILLIONS) | SCREENS | DIGITAL SCREENS | % OF SCREENS IN MULTIPLEXES | AVERAGE TICKET PRICE |
|---|---|---|---|---|---|---|---|
| ALBANIA | 3,063,320 | €3,004 | n/a | 17 | 15 | 65 | €4 |
| AUSTRIA | 8,477,000 | €36,930 | 16.4 | 565 | 444 | 49 | €7.79 |
| BULGARIA | 7,364,570 | €5,493 | 4.794 | 164 | 160 | 86 | €4.24 |
| BOS & HERZ | 3,972,000 | €3,356 | 0.773 | 31 | 22 | 35 | €2.60 |
| CROATIA | 4,280,000 | €10,939 | 3.9 | 153 | 137 | 71 | €4.46 |
| CYPRUS | 867,100 | €19,033 | 0.635 | 35 | 17 | 80 | €8 |
| GEORGIA | 4,900,000 | €2,509 | 0.653 | 9 | 8 | 100 | €3.15 |
| GREECE | 10,815,197 | €16,982 | 9.2 | 482 | 146 | 43 | €7 |
| HUNGARY | 9,900,000 | €16,541 | 10.145 | 340 | 292 | 44 | €4.40 |
| KOSOVO | 1,700,000 | €5,800 | 0.055 | 2 | 2 | 0 | €4 |
| MACEDONIA | 2,020,000 | €3,500 | 0.078 | 26 | 25 | 35 | €1.60 |
| MONTENEGRO | 623,500 | €5,350 | 0.22 | 18 | 6 | 100 | €3 |
| ROMANIA | 20,000,000 | €13,808 | 9.048 | 264 | 228 | 93 | €3.96 |
| SERBIA | 7,181,505 | €4,453 | 2.368 | 117 | 30 | 9 | €2.50 |
| SLOVENIA | 2,058,821 | €17,128 | 2.337 | 112 | 50 | 34 | €4.75 |
| TURKEY | 76,667,864 | €8,000 | 50.405 | 2,170 | 1,442 | 91 | €3.50 |

**Sources** National Film Centres, OBS, IMF, WB, various sources

# FACTS SHEETS BY TERRITORY

■ ALBANIA ■ AUSTRIA ■ BULGARIA ■ BOS & HERZ ■ CROATIA ■ CYPRUS ■ GEORGIA ■ GREECE ■ HUNGARY ■ KOSOVO ■ MACEDONIA ■ MONTENEGRO ■ ROMANIA ■ SERBIA ■ SLOVENIA ■ TURKEY

## ALBANIA

| GENERAL INFO | |
|---|---|
| Official name of country | Republic of Albania |
| Population | 3,063,320 |
| GDP per capita | €3,004.29 |
| Film-supporting institutions (public) | Albanian National Center of Cinematography (ANCC) Albanian Public TV (TVSH) |
| Public funding available | €680,000* |
| Average production budget | €580,000 |
| European Convention on Cinematographic Co-productions | Yes |
| SEE Cinema Network | Yes |
| Eurimages | Yes |
| Media | No |
| European Audiovisual Observatory | Yes |
| European Film Promotion | Yes |
| Tax incentives | No |

| FILM INSTITUTION ATTENDING SARAJEVO FILM FESTIVAL | |
|---|---|
| Film institution | Albanian National Center of Cinematography |
| Address | Aleksander Moisiu 77, 1012-Tirana Albania |
| Telephone | ☎ +355 4237 8004 |
| E-mail | info@nationalfilmcenter.gov.al |
| Web address | www.nationalfilmcenter.gov.al |
| Chief executive | Ilir Butka (chairman) |
| Exec attending Sarajevo Film Festival | Artan Minarolli |

* Plus direct governmental funding if applied

| DISTRIBUTION INFO | |
|---|---|
| Admissions 2013 | n/a |
| National film market share | n/a |
| Cumulative box office | n/a |
| Number of screens | 17 |
| Number of digital screens | 15 |
| Percentage of screens in multiplexes | 64.7% |
| Average ticket price | €4 |
| Number of VoD platforms | n/a |
| VoD platforms | n/a |
| Internet penetration rate | 74.38% |

| PRODUCTION INFO | |
|---|---|
| Number of feature films produced † | 7 |
| Number of co-productions | 5 |
| Minority co-productions | 4 |
| Majority co-productions | 1 |
| 100% national films | 2 |
| Number of feature documentaries produced | n/a |
| Number of shorts produced | 2 (supported by ANCC) rest (n/a) |

† Not including feature documentaries

## AUSTRIA

| GENERAL INFO | |
|---|---|
| Official name of country | Austria |
| Population | 8,477,000 |
| GDP per capita | €36,930 |
| Film-supporting institutions (public) | 19 (Austrian Film Institute, ORF/Film-Fernseh-Abkommen, Filmfonds Wien, BKA, RTR Fernsehfonds, plus more) |
| Public funding available | €68,000,000 |
| Average production budget | €1,800,000 |
| European Convention on Cinematographic Co-productions | Yes |
| SEE Cinema Network | Yes |
| Eurimages | Yes |
| Media | Yes |
| European Audiovisual Observatory | Yes |
| European Film Promotion | Yes |
| Tax incentives | No |

| FILM INSTITUTION ATTENDING SARAJEVO FILM FESTIVAL | |
|---|---|
| Film institution | Austrian Film Commission |
| Address | Stiftgasse 6, 1070 Vienna, Austria |
| Telephone / fax number | ☎ +43 1 526 33 23 🖷 +43 1 526 68 01 |
| E-mail | office@afc.at |
| Web address | Austrianfilm.com |
| Chief executive | Martin Schweighofer (executive director) |
| Exec attending Sarajevo Film Festival | Martin Schweighofer |

| DISTRIBUTION INFO | |
|---|---|
| Admissions 2013 | 16,400,802 |
| National film market share | 3.6% |
| Cumulative box office | €132,000,000 |
| Number of screens | 565 |
| Number of digital screens | 444 |
| % of screens in multiplexes | 49% |
| Average ticket price | €7.79 |
| Number of VoD platforms | 31 |
| VoD platforms | Flimmit, ORF, UPC, filmladen A1, Drei, plus more |
| Internet penetration rate | 81% |

| PRODUCTION INFO | |
|---|---|
| Number of feature films produced † | 23 |
| Number of co-productions | 14 |
| Minority co-productions | 8 |
| Majority co-productions | 6 |
| 100% national films | 9 |
| Number of feature documentaries produced | 31 |
| Number of shorts produced | n/a |

† not including feature documentaries

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# BOSNIA & HERZEGOVINA

| GENERAL INFO | |
|---|---|
| **Official name of country** | Bosnia & Herzegovina |
| **Population** | 3,972,000 |
| **GDP per capita** | €3,356 |
| **Film-supporting institutions (public)** | Film Fund Sarajevo, Ministry of Culture of Republic Srpska, Ministry of Culture and Sports of Kanton Sarajevo |
| **Public funding available** | €1,000,000 |
| **Average production budget** | €750,000 |
| **European Convention on Cinematographic Co-productions** | Yes |
| **SEE Cinema Network** | No |
| **Eurimages** | Yes |
| **Media** | Yes |
| **European Audiovisual Observatory** | Yes |
| **European Film Promotion** | No |
| **Tax incentives** | No |

| FILM INSTITUTION ATTENDING SARAJEVO FILM FESTIVAL | |
|---|---|
| **Film institution** | Film Fund Sarajevo |
| **Address** | Obala Maka Dizdara 2, 71000 Sarajevo |
| **Telephone / fax number** | ☎ +387 33 206 704 🖷 +387 33 226 675 |
| **E-mail** | fondacija@bhfilm.ba |
| **Web address** | www.bhfilm.ba |
| **Chief executive** | Jovan Marjanovic |
| **Exec attending Sarajevo Film Festival** | Ivo Colak |

| DISTRIBUTION INFO | |
|---|---|
| **Admissions 2013** | 772,623 |
| **National film market share** | 1% |
| **Cumulative box office** | €2,013,229.32 |
| **Number of screens** | 31 |
| **Number of digital screens** | 22 |
| **% of screens in multiplexes** | 35% |
| **Average ticket price** | €2.60 |
| **Number of VoD platforms** | 4 |
| **VoD platforms** | BH Telecom, Eronet, Mtel, Logosoft |
| **Internet penetration rate** | 65.4% |

| PRODUCTION INFO | |
|---|---|
| **Number of feature films produced*** | 9 |
| **Number of co-productions** | 7 |
| **Minority co-productions** | 4 |
| **Majority co-productions** | 3 |
| **100% national films** | 2 |
| **Number of feature documentaries produced** | 1 |
| **Number of shorts produced** | 37 |

* Not including feature documentaries

# BULGARIA

| GENERAL INFO | |
|---|---|
| **Official name of country** | Bulgaria |
| **Population** | 7,364,570 |
| **GDP per capita** | €5,493 |
| **Film-supporting institutions (public)** | Bulgarian National Film Center |
| **Public funding available** | €6,493,407 |
| **Average production budget** | €932,000 |
| **European Convention on Cinematographic Co-productions** | Yes |
| **SEE Cinema Network** | Yes |
| **Eurimages** | Yes |
| **Media** | Yes |
| **European Audiovisual Observatory** | Yes |
| **European Film Promotion** | Yes |
| **Tax incentives** | No |

| FILM INSTITUTION ATTENDING SARAJEVO FILM FESTIVAL | |
|---|---|
| **Film institution** | Bulgarian National Film Center |
| **Address** | 2-A, Dondukov Blvd, 1000 Sofia, Bulgaria |
| **Telephone / fax number** | ☎ +359 2 988 38 31 🖷 +359 2 980 99 20 |
| **E-mail** | nfc@nfc.bg |
| **Web address** | www.nfc.bg |
| **Chief executive** | Georgy Cholakov (acting executive director) |
| **Exec attending Sarajevo Film Festival** | Georgy Cholakov |

| DISTRIBUTION INFO | |
|---|---|
| **Admissions 2013** | 4,794,391 |
| **National film market share** | 4.20% |
| **Cumulative box office** | €20,462,836 |
| **Number of screens** | 164 |
| **Number of digital screens** | 160 |
| **% of screens in multiplexes** | 86% |
| **Average ticket price** | €4.24 |
| **Number of VoD platforms** | 7 |
| **VoD platforms** | Owners: bTV Media Group, Vestitel BG, Vivacom, Mtel, Miramar, In Dreams, Neterra |
| **Internet penetration rate** | 55.1% |

| PRODUCTION INFO | |
|---|---|
| **Number of feature films produced*** | 2 |
| **Number of co-productions** | 1 |
| **Minority co-productions** | 0 |
| **Majority co-productions** | 1 |
| **100% national films** | 1 |
| **Number of feature documentaries produced** | 6 |
| **Number of shorts produced** | 17 |

* Not including feature documentaries

# CROATIA

| GENERAL INFO | |
|---|---|
| Official name of country | Croatia |
| Population | 4,280,000 |
| GDP per capita | €10,939 |
| Film-supporting institutions (public) | Croatian Audiovisual Centre (HAVC), City of Zagreb, City of Rijeka |
| Public funding available | €8,000,000 |
| Average production budget | €1,000,000 |
| European Convention on Cinematographic Co-productions | Yes |
| SEE Cinema Network | Yes |
| Eurimages | Yes |
| Media | Yes |
| European Audiovisual Observatory | Yes |
| European Film Promotion | Yes |
| Tax incentives | Yes |

| FILM INSTITUTION ATTENDING SARAJEVO FILM FESTIVAL | |
|---|---|
| Film institution | Croatian Audiovisual Centre |
| Address | Nova Ves 18, Zagreb |
| Telephone | ☎ +385 1 604 1080 |
| E-mail | promotion@havc.hr |
| Web address | www.havc.hr |
| Chief executive | Hrvoje Hribar |
| Exec attending Sarajevo Film Festival | Hrvoje Hribar |

| DISTRIBUTION INFO | |
|---|---|
| Admissions 2013 | 3,900,000 |
| National film market share | 11.00% |
| Cumulative box office | €15,527,485 |
| Number of screens | 153 |
| Number of digital screens | 137 |
| % of screens in multiplexes | 71% |
| Average ticket price | €4.46 |
| Number of VoD platforms | 19 |
| VoD platforms | Axn Player; Bnet Video klub, Bnet Videoteka. Euronews No Comment: filmarchive online, HBO GO Croatia, HBO OD Croatia;Internet Archive; iskon Videoteka, Max TV Videteka, Mediaset Online, National Geographic Video, Opti TV Videoteka, RTL klub@youtube, RTL Now, RTL TV Video, Shofha(Arabic), Shofha (English) |
| Internet penetration rate | 71% |

| PRODUCTION INFO | |
|---|---|
| Number of feature films produced* | 21 |
| Number of co-productions | 7 |
| Minority co-productions | 5 |
| Majority co-productions | 2 |
| 100% national films | 14 |
| Number of feature documentaries produced | 8 |
| Number of shorts produced | 52 |

* Not including feature documentaries

# CYPRUS

| GENERAL INFO | |
|---|---|
| Official name of country | Cyprus |
| Population | 867,100 |
| GDP per capita | €19,033 |
| Film-supporting institutions (public) | Ministry of Education and Culture |
| Public funding available | €700,000 |
| Average production budget | €850,000 |
| European Convention on Cinematographic Co-productions | Yes |
| SEE Cinema Network | Yes |
| Eurimages | Yes |
| Media | Yes |
| European Audiovisual Observatory | Yes |
| European Film Promotion | Yes |
| Tax incentives | No |

| FILM INSTITUTION ATTENDING SARAJEVO FILM FESTIVAL | |
|---|---|
| Film institution | Ministry of Education and Culture |
| Address | 27, Ifigenias Str 2007, Nicosia, Cyprus |
| Telephone / fax number | ☎ +357 22 809 845 |
| E-mail | moec@moec.gov.cy |
| Web address | www.moec.gov.cy |
| Chief executive | Paraskevas Pavlos |
| Exec attending Sarajevo Film Festival | Diomides Nikitas |

| DISTRIBUTION INFO | |
|---|---|
| Admissions 2013 | 634,678 |
| National film market share | n/a |
| Cumulative box office | €4,898,648 |
| Number of screens | 35 |
| Number of digital screens | 17 |
| % of screens in multiplexes | 80% |
| Average ticket price | €8 |
| Number of VoD platforms | 5 |
| VoD platforms | Antenna Tv, Cy.B.C, CYTA, Lumiere TV Primetel |
| Internet penetration rate | 61% |

| PRODUCTION INFO | |
|---|---|
| Number of feature films produced* | 1 |
| Number of co-productions | 1 |
| Minority co-productions | 0 |
| Majority co-productions | 1 |
| 100% national films | 0 |
| Number of feature documentaries produced | 1 |
| Number of shorts produced | 3 |

* Not including feature documentaries

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# GEORGIA

| GENERAL INFO | |
|---|---|
| Official name of country | Georgia |
| Population | 4,900,000 |
| GDP per capita | €2,509.00 |
| Film-supporting institutions (public) | Georgian National Film Center |
| Public funding available | €2,013,385.00 |
| Average production budget | €1,226,487.00 |
| European Convention on Cinematographic Co-productions | Yes |
| SEE Cinema Network | No |
| Eurimages | Yes |
| Media | No |
| European Audiovisual Observatory | No |
| European Film Promotion | Yes |
| Tax incentives | No |

| FILM INSTITUTION ATTENDING SARAJEVO FILM FESTIVAL | |
|---|---|
| Film institution | Georgian National Film Center |
| Address | Gamsakhurdia Sanapiro 4 |
| Telephone | ☎ +995 32 299 9200 |
| E-mail | info@gnfc.ge |
| Web address | www.gnfc.ge |
| Chief executive | Nana Janelidze (director) |
| Exec attending Sarajevo Film Festival | Nana Janelidze |

| DISTRIBUTION INFO | |
|---|---|
| Admissions 2013 | 652,556 |
| National film market share | 9.5% |
| Cumulative box office | €2,274,772.00 |
| Number of screens | 9 |
| Number of digital screens | 8 |
| % of screens in multiplexes | 100% |
| Average ticket price | €3.15 |
| Number of VoD platforms | 3 |
| VoD platforms | www.myvideo.ge; www.silk-tv.ge; www.co.ge/caucasustv.aspx |
| Internet penetration rate | 45% |

| PRODUCTION INFO | |
|---|---|
| Number of feature films produced* | 12 |
| Number of co-productions | 6 |
| Minority co-productions | 2 |
| Majority co-productions | 4 |
| 100% national films | 6 |
| Number of feature documentaries produced | 4 |
| Number of shorts produced | 15 |

* Not including feature documentaries

# GREECE

| GENERAL INFO | |
|---|---|
| Official name of country | Greece |
| Population | 10,815,197 |
| GDP per capita | €16,982.63 |
| Film-supporting institutions (public) | Greek Film Centre |
| Public funding available | n/a |
| Average production budget | 450,000 |
| European Convention on Cinematographic Co-productions | Yes |
| SEE Cinema Network | Yes |
| Eurimages | Yes |
| Media | Yes |
| European Audiovisual Observatory | Yes |
| European Film Promotion | Yes |
| Tax incentives | Yes |

| FILM INSTITUTION ATTENDING SARAJEVO FILM FESTIVAL | |
|---|---|
| Film institution | Greek Film Centre |
| Address | 7 Dionissiou Areopagitou Str, 11742 Athens, Greece |
| Telephone / fax number | ☎ +30 21 0367 8500 📠 +30 21 0364 8269 |
| E-mail | info@gfc.gr |
| Web address | www.gfc.gr |
| Chief executive | Grigoris Karandinakis (general manager) |
| Exec attending Sarajevo Film Festival | Grigoris Karandinakis |

| DISTRIBUTION INFO | |
|---|---|
| Admissions 2013 | 9.2 |
| National film market share | 7.2% |
| Cumulative box office | €59,300,000 |
| Number of screens | 482 |
| Number of digital screens | 146 |
| % of screens in multiplexes | 205 |
| Average ticket price | €7 |
| Number of VoD platforms | 3 |
| VoD platforms | COSMOTE, HOL, NOVA |
| Internet penetration rate | 59.9% |

| PRODUCTION INFO | |
|---|---|
| Number of feature films produced* | 17 |
| Number of co-productions | 5 |
| Minority co-productions | 2 |
| Majority co-productions | 3 |
| 100% national films | 12 |
| Number of feature documentaries produced | 52 |
| Number of shorts produced | 85 |

* Not including feature documentaries

# HUNGARY

| GENERAL INFO | |
|---|---|
| **Official name of country** | Hungary |
| **Population** | 9,900,000 |
| **GDP per capita** | €16,541.35 |
| **Film-supporting institutions (public)** | Hungarian National Film Fund |
| **Public funding available** | €17,600,000 |
| **Average production budget** | €1,800,000 |
| **European Convention on Cinematographic Co-productions** | Yes |
| **SEE Cinema Network** | No |
| **Eurimages** | Yes |
| **Media** | Yes |
| **European Audiovisual Observatory** | Yes |
| **European Film Promotion** | Yes |
| **Tax incentives** | Yes |

| FILM INSTITUTION ATTENDING SARAJEVO FILM FESTIVAL | |
|---|---|
| **Film institution** | Hungarian National Film Fund |
| **Address** | 1145 Budapest, Rona u. 174 |
| **Telephone** | ☎ +36 1 461 1320 |
| **E-mail** | filmalap@filmalap.hu |
| **Web address** | http://filmfund.hu |
| **Chief executive** | Agnes Cs.Havas |
| **Exec attending Sarajevo Film Festival** | Agnes Cs.Havas |

| DISTRIBUTION INFO | |
|---|---|
| **Admissions 2013** | 10,145,000 |
| **National film market share** | 1.2% |
| **Cumulative box office** | €45,400,000 |
| **Number of screens** | 340 |
| **Number of digital screens** | 292 |
| **% of screens in multiplexes** | 44% |
| **Average ticket price** | €4.40 |
| **Number of VoD platforms** | n/a |
| **VoD platforms** | n/a |
| **Internet penetration rate** | 74.38% |

| PRODUCTION INFO | |
|---|---|
| **Number of feature films produced*** | 32 |
| **Number of co-productions** | 7 |
| **Minority co-productions** | 3 |
| **Majority co-productions** | 4 |
| **100% national films** | 25 |
| **Number of feature documentaries produced** | 53 |
| **Number of shorts produced** | n/a |

* Not including feature documentaries

# KOSOVO

| GENERAL INFO | |
|---|---|
| **Official name of country** | Republic of Kosovo |
| **Population** | 1,700,000 |
| **GDP per capita** | €5,800 |
| **Film-supporting institutions (public)** | 20 |
| **Public funding available** | €700,000 |
| **Average production budget** | €350,000 |
| **European Convention on Cinematographic Co-productions** | No |
| **SEE Cinema Network** | Yes |
| **Eurimages** | No |
| **Media** | No |
| **European Audiovisual Observatory** | No |
| **European Film Promotion** | Yes |
| **Tax incentives** | No |

| FILM INSTITUTION ATTENDING SARAJEVO FILM FESTIVAL | |
|---|---|
| **Film institution** | Kosovo Cinematography Center |
| **Address** | Qafa-Galeria nr15 10000 Prishtina |
| **Telephone** | ☎ 381 38 213228 |
| **E-mail** | info@qkk-rks.com |
| **Web address** | www.qkk-rks.com |
| **Chief executive** | Arben Zharku (president) |
| **Exec attending Sarajevo Film Festival** | Arben Zharku |

| DISTRIBUTION INFO | |
|---|---|
| **Admissions 2013** | 54,857 |
| **National film market share** | n/a |
| **Cumulative box office** | €219,428 |
| **Number of screens** | 2 |
| **Number of digital screens** | 2 |
| **% of screens in multiplexes** | 0% |
| **Average ticket price** | €4 |
| **Number of VoD platforms** | 0 |
| **VoD platforms** | 0 |
| **Internet penetration rate** | n/a |

| PRODUCTION INFO | |
|---|---|
| **Number of feature films produced*** | 4 |
| **Number of co-productions** | 2 |
| **Minority co-productions** | 1 |
| **Majority co-productions** | 1 |
| **100% national films** | 2 |
| **Number of feature documentaries produced** | 4 |
| **Number of shorts produced** | 8 |

* Not including feature documentaries

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# MACEDONIA

| GENERAL INFO | |
|---|---|
| **Official name of country** | Republic of Macedonia |
| **Population** | 2,020,000 |
| **GDP per capita** | €3,500 |
| **Film-supporting institutions (public)** | Ministry of culture; Macedonian Film Agency |
| **Public funding available** | €5,100,000 |
| **Average production budget** | €5,100,000 |
| **European Convention on Cinematographic Co-productions** | Yes |
| **SEE Cinema Network** | Yes |
| **Eurimages** | Yes |
| **Media** | No |
| **European Audiovisual Observatory** | Yes |
| **European Film Promotion** | Yes |
| **Tax incentives** | Yes |

| FILM INSTITUTION ATTENDING SARAJEVO FILM FESTIVAL | |
|---|---|
| **Film institution** | Macedonian Film Agency |
| **Address** | 8 Mart no 4, 1000, Skopje, Macedonia |
| **Telephone / fax number** | ☎ +389 2 3224 100 🖷 +389 2 3224 111 |
| **E-mail** | contact@filmfund.gov.mk |
| **Web address** | www.filmagency.gov.mk; www.filmfund.gov.mk |
| **Chief executive** | Darko Basheski (acting director) |
| **Exec attending Sarajevo Film Festival** | Darko Basheski |

| DISTRIBUTION INFO | |
|---|---|
| **Admissions 2013** | 77,870 |
| **National film market share** | n/a |
| **Cumulative box office** | €123,131 |
| **Number of screens** | 26 |
| **Number of digital screens** | 25 |
| **% of screens in multiplexes** | 35% |
| **Average ticket price** | €1.60 |
| **Number of VoD platforms** | 1 |
| **VoD platforms** | Makedonski Telekom AD |
| **Internet penetration rate** | 63.1% |

| PRODUCTION INFO | |
|---|---|
| **Number of feature films produced*** | 2 |
| **Number of co-productions** | 2 |
| **Minority co-productions** | 0 |
| **Majority co-productions** | 2 |
| **100% national films** | 0 |
| **Number of feature documentaries produced** | 0 |
| **Number of shorts produced** | 9 |

* Not including feature documentaries

# MONTENEGRO

| GENERAL INFO | |
|---|---|
| **Official name of country** | Montenegro |
| **Population** | 623,500 |
| **GDP per capita** | €5,350 |
| **Film-supporting institutions (public)** | Ministry of Culture of Montenegro |
| **Public funding available** | €178,500 |
| **Average production budget** | n/a |
| **European Convention on Cinematographic Co-productions** | Yes |
| **SEE Cinema Network** | No |
| **Eurimages** | No |
| **Media** | No |
| **European Audiovisual Observatory** | Yes |
| **European Film Promotion** | Yes |
| **Tax incentives** | No |

| FILM INSTITUTION ATTENDING SARAJEVO FILM FESTIVAL | |
|---|---|
| **Film institution** | Ministry of Culture of Montenegro; Audiovisual Creativity and Cinematography |
| **Address** | Malo Brdo N3/N4, Podgorica, Montenegro |
| **Telephone / fax number** | ☎ +382 68 240 440 🖷 +382 20 227 445 |
| **E-mail** | ivandjurovic@artikulacija.co.me |
| **Web address** | www.ministarstvokulture.gov.me |
| **Chief executive** | Ilija Subotic |
| **Exec attending Sarajevo Film Festival** | Ilija Subotic |

| DISTRIBUTION INFO | |
|---|---|
| **Admissions 2013** | 219,910 |
| **National film market share** | n/a |
| **Cumulative box office** | €760,820 |
| **Number of screens** | 18 |
| **Number of digital screens** | 6 |
| **% of screens in multiplexes** | 100% |
| **Average ticket price** | €3.00 |
| **Number of VoD platforms** | 1 |
| **VoD platforms** | Extra TV |
| **Internet penetration rate** | 56.8% |

| PRODUCTION INFO | |
|---|---|
| **Number of feature films produced*** | 0 |
| **Number of co-productions** | 0 |
| **Minority co-productions** | 0 |
| **Majority co-productions** | 0 |
| **100% national films** | 0 |
| **Number of feature documentaries produced** | 2 |
| **Number of shorts produced** | 4 |

* Not including feature documentaries

# ROMANIA

| GENERAL INFO | |
|---|---|
| Official name of country | Romania |
| Population | 2,000,000 |
| GDP per capita | €13,808 |
| Film-supporting institutions (public) | n/a |
| Public funding available | n/a |
| Average production budget | n/a |
| European Convention on Cinematographic Co-productions | Yes |
| SEE Cinema Network | Yes |
| Eurimages | Yes |
| Media | Yes |
| European Audiovisual Observatory | Yes |
| European Film Promotion | Yes |
| Tax incentives | No |

| FILM INSTITUTION ATTENDING SARAJEVO FILM FESTIVAL | |
|---|---|
| Film institution | Romanian Film Promotion |
| Address | 52,Popa Soare St., et.1,ap.4, RO - 023984 Bucharest 2 |
| Telephone / fax number | ☎ +40 21 326 6480 🖷 +40 21 326 0268 |
| E-mail | info@romfilmpromotion.ro |
| Web address | www.romfilmpromotion.ro |
| Chief executive | Mihai Ioan Kogalniceanu (general manager) |
| Exec attending Sarajevo Film Festival | Mihai Ioan Kogalniceanu |

| DISTRIBUTION INFO | |
|---|---|
| Admissions 2013 | 9,048,257 |
| National film market share | 0.03% |
| Cumulative box office | €35,793,507.00 |
| Number of screens | 264 |
| Number of digital screens | 228 |
| % of screens in multiplexes | 93.40% |
| Average ticket price | €3.96 |
| Number of VoD platforms | n/a |
| VoD platforms | n/a |
| Internet penetration rate | 51.66% |

| PRODUCTION INFO | |
|---|---|
| Number of feature films produced* | 25 |
| Number of co-productions | 9 |
| Minority co-productions | 2 |
| Majority co-productions | 7 |
| 100% national films | 16 |
| Number of feature documentaries produced | 5 |
| Number of shorts produced | 5 |

* Not including feature documentaries

# SERBIA

| GENERAL INFO | |
|---|---|
| Official name of country | Republic of Serbia |
| Population | 7,181,505 |
| GDP per capita | €4,453 |
| Film-supporting institutions (public) | Film Center Serbia; Secretariat for Culture, Autonomous Province of Vojvodina |
| Public funding available | €3,000,000 |
| Average production budget | €700,000 |
| European Convention on Cinematographic Co-productions | Yes |
| SEE Cinema Network | Yes |
| Eurimages | Yes |
| Media | No |
| European Audiovisual Observatory | No |
| European Film Promotion | Yes |
| Tax incentives | No |

| FILM INSTITUTION ATTENDING SARAJEVO FILM FESTIVAL | |
|---|---|
| Film institution | Film Center Serbia |
| Address | Zagrebacka 9/3, 11000 Belgrade, Serbia |
| Telephone / fax number | ☎ +381 11 262 5131 🖷 +381 11 263 4253 |
| E-mail | fcs.office@fcs.rs |
| Web address | www.fcs.rs |
| Chief executive | Nada Popovic Perisic |
| Exec attending Sarajevo Film Festival | Miroljub Vuckovic |

| DISTRIBUTION INFO | |
|---|---|
| Admissions 2013 | 2,368,261 |
| National film market share | 7% |
| Cumulative box office | €6,926,363 |
| Number of screens | 117 |
| Number of digital screens | 30 |
| % of screens in multiplexes | 9% |
| Average ticket price | €2.50 |
| Number of VoD platforms | 3 |
| VoD platforms | SBB, Telekom Open IPTV, Samsung |
| Internet penetration rate | 55.8% |

| PRODUCTION INFO | |
|---|---|
| Number of feature films produced* | 10 |
| Number of co-productions | 6 |
| Minority co-productions | 2 |
| Majority co-productions | 4 |
| 100% national films | 4 |
| Number of feature documentaries produced | 10 |
| Number of shorts produced | 40 |

* Not including feature documentaries

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# SLOVENIA

| GENERAL INFO | |
|---|---|
| **Official name of country** | Republic of Slovenia |
| **Population** | 2,058,821 |
| **GDP per capita** | €17,128 |
| **Film-supporting institutions (public)** | Slovenian Film Centre |
| **Public funding available** | €3,861,927 (for 2014) |
| **Average production budget** | €1,008,050 |
| **European Convention on Cinematographic Co-productions** | Yes |
| **SEE Cinema Network** | Yes |
| **Eurimages** | Yes |
| **Media** | Yes |
| **European Audiovisual Observatory** | Yes |
| **European Film Promotion** | Yes |
| **Tax incentives** | No (currently in low proposal) |

| FILM INSTITUTION ATTENDING SARAJEVO FILM FESTIVAL | |
|---|---|
| **Film institution** | Slovenian Film Centre |
| **Address** | Miklosiceva 38, SI-1000 Ljubljana |
| **Telephone** | +386 1 234 3200 |
| **E-mail** | info@film-center.si |
| **Web address** | www.film-center.si |
| **Chief executive** | Jozko Rutar (director) |
| **Exec attending Sarajevo Film Festival** | Jozko Rutar |

| DISTRIBUTION INFO | |
|---|---|
| **Admissions 2013** | 2,336,614 |
| **National film market share** | 10.85% |
| **Cumulative box office** | €11,090,784 |
| **Number of screens** | 112 |
| **Number of digital screens** | 50 |
| **% of screens in multiplexes** | 34% |
| **Average ticket price** | €4.75 |
| **Number of VoD platforms** | 9 |
| **VoD platforms** | Voyo, Videosvet, TiTV, Dajmedol, VIDEOMANIJA, www.sponka.tv, Video klub, T-2 Videoteka |
| **Internet penetration rate** | 74% |

| PRODUCTION INFO | |
|---|---|
| **Number of feature films produced*** | 20 |
| **Number of co-productions** | 11 |
| **Minority co-productions** | 7 |
| **Majority co-productions** | 4 |
| **100% national films** | 9 |
| **Number of feature documentaries produced** | 4 |
| **Number of shorts produced** | 3 |

* Not including feature documentaries

# TURKEY

| GENERAL INFO | |
|---|---|
| **Official name of country** | Republic of Turkey |
| **Population** | 76,667,864 |
| **GDP per capita** | €8,000 |
| **Film-supporting institutions (public)** | General Directorate of Cinema |
| **Public funding available** | €3,230,808 |
| **Average production budget** | €400,000 |
| **European Convention on Cinematographic Co-productions** | Yes |
| **SEE Cinema Network** | No |
| **Eurimages** | Yes |
| **Media** | No |
| **European Audiovisual Observatory** | Yes |
| **European Film Promotion** | No |
| **Tax incentives** | Yes |

| FILM INSTITUTION ATTENDING SARAJEVO FILM FESTIVAL | |
|---|---|
| **Film institution** | Ankara Cinema Association |
| **Address** | Abay Kunanbay Cad No: 20/11 06700 Kavaklıdere, Ankara, Turkey |
| **Telephone / fax number** | +90 312 466 3484 +90 312 466 4 28 |
| **E-mail** | info@festivalonwheels.org |
| **Web address** | www.festivalonwheels.org |
| **Chief executive** | Ahmet Boyacioglu |
| **Exec attending Sarajevo Film Festival** | Ahmet Boyacioglu |

| DISTRIBUTION INFO | |
|---|---|
| **Admissions 2013** | 50,405,020 |
| **National film market share** | 53.56% |
| **Cumulative box office** | €174,227,609 |
| **Number of screens** | 2,170 |
| **Number of digital screens** | 1,442 |
| **% of screens in multiplexes** | 91% |
| **Average ticket price** | €3.50 |
| **Number of VoD platforms** | n/a |
| **VoD platforms** | n/a |
| **Internet penetration rate** | 46.62% |

| PRODUCTION INFO | |
|---|---|
| **Number of feature films produced*** | 85 |
| **Number of co-productions** | 7 |
| **Minority co-productions** | 1 |
| **Majority co-productions** | 6 |
| **100% national films** | 78 |
| **Number of feature documentaries produced** | n/a |
| **Number of shorts produced** | n/a |

* Not including feature documentaries

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