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State Of The Region

2013



Content:



1	Film Finance	6
2	Cultural Policy	12
3	Business Models	18
4	Production, Distribution and Exhibition in SEE	33
5	Facts Sheets by Country	46

Introduction



Welcome to the Forum

With the Regional Forum we are trying to create a platform where the industry can meet and join efforts to take on all the big issues and challenges. Looking back, we're proud to say that some major regional initiatives have had their starting or breaking points in Sarajevo, like the joint Southeast European Pavilion in Cannes. As for the current edition, we did a major restructuring of the Regional Forum, which is now much more focused on hot debate issues while the content which was previously part of the Forum has been moved to the newly created space, the Industry Terrace and to its focus on business, making it a meeting place intended to increase business opportunities for film rights, service productions and equipment.

The first, essayistic part of this publication is divided into three chapters, each corresponding to the topic of one of the three sessions at the Forum, offering written contributions from the speakers at the sessions.

Chapter 1 is focused on public financing for film in the countries of Former Yugoslavia, which will in fact be looked at from a variety of angles during the festival. The thing is, we have to stick to the attitude that it is usually from crisis that change is made, and try to draw inspiration and knowledge from positive examples like Croatia, but also from history. Actually, the Croatian system was created on the legacy of the Yugoslav film laws from 1956 and 1978, which all these countries had some experience with, so there is a history we can build on which is very important. Contributions from Sanja Ravlic, Mirosljub Vuckovic, Jovan Marjanovic and Bengt Toll that you can read further on, can serve as the basis for an on-going discussion by all the heads of national film bodies in former Yugoslavia looking to streamline their practices to ease co-production between our countries.

Chapter 2 is looking at public policies when it comes to the creative industries.

Over the year of 2013 Sarajevo Film Festival has managed to navigate further governmental budget cuts and to maintain the level we're at and even keep improving. But behind the scenes, we have a situation that is not sustainable in the long term and this is unfortunately not just the case with our festival, but with most cultural businesses in the region. We need to strengthen the public-private nexus to unleash

the potential different creative industries have in this region. We will look into the examples of Edinburgh, Manchester and Berlin for inspiration and are hugely grateful to Ken Hay, Dave Moutrey and Thomas Hailer for their contributions.

Chapter 3 concentrates on the hot issues of online piracy, new players in the value chain and changing paradigm of US – European film industries relations.

The session formulated together with APAW BiH will present a model for fighting online piracy in Bosnia and Herzegovina that might serve our neighbours as well, but will also look into how new media players can be integrated into the existing systems of public support. Contributions from Erik Barnett, Antonio Beus, Roberto Olla and Elisabeth O. Sjastad are in front of you and we are very much looking forward to theirs, as well as Cris Marcich participation in the panel on the last day of this years Forum.

Last but not the least, their Excellences, Ambassadors of the UK and France in Bosnia and Herzegovina, Nigel Casey and Roland Gilles will address the Forum with keynote speeches on creative industries and the organisation and legacy of the cultural events being prepared for the commemoration of the WWI centennial in Sarajevo in 2014.

The second part of the publication compiles the basic data on the film industry in the region and gives a unique analysis of the film related statistics in this diverse set of territories.

We would like to thank our dear partners for making the Regional Forum together with us once again; our deepest gratitude goes to Screen International, MEDIA programme of the European Union, Royal Norwegian Embassy in Bosnia and Herzegovina, British Council in Bosnia and Herzegovina, APAW BiH and the US Embassy in Sarajevo.

Have a great Forum!

Mirsad Purivatra

Film Finance

Streamlining the Public Funding for Coproductions in the Countries of Former Yugoslavia

7 Points on the State of the Film Industry in Southeast Europe

Jovan Marjanovic

● Scarcity of financing and international coproduction as the answer

Key issue in financing film in Southeast Europe is the overall lack of means. This is accurate for both public and private investors.

Public sources have been hit hard by the economic downturn, primarily due to the fact that most of them are dependent on a single source of income, most often the national governments, which made further cuts to their already modest budgets.

Private sources have been inactive even before the economy took the plunge, as it proved very hard to extract finance from the film value chain itself since the respective national markets were, and still are, very weak and unregulated.

In such an environment producers find themselves "between the rock and the hard place", as they too are dependant on a single source of public funding and face no prospects of raising the production finance from the market. In Southeast Europe, unlike the rest of the continent, this is the same for both art-house and market driven films, which explains why both types of projects choose European coproduction as an answer to this issue and subsequently knock on the same doors for funding. At the same time this is one of the reasons so many Southeast European countries joined Eurimages in the past decade.

Besides increased competition for diminishing resources, international coproduction brings another two financial constraints for producers, firstly it increases the budgets due to the costs of coproducing itself and secondly it usually prolongs the time spent on the project, as it takes longer to develop and finance. Still, these downsides are offset by the fact that international co-productions have a better circulation

potential and when national markets are small and underdeveloped, this becomes a priority also from the economic perspective.

● Changing reality of Eurimages

Consequently, for many of those going down the European coproduction way, Eurimages represents an important additional source of finance. In the past 5 years, we have witnessed a significant number of projects from Southeast Europe approaching Eurimages for funding and luckily for them, largely successfully so. This benefited the policies of the respective national funds as it has complemented theirs, in relation to the overall budget, modest investments and made the projects fully financed and ready to enter production.

However, this is about to change with further enlargement of Eurimages, which in fact didn't translate into significant increase in funding available, but has made more projects eligible at the same time when a significant increase in projects applying occurred, as funding for film has been harder to find elsewhere, rendering Eurimages way more competitive than it used to be, as 1 out of 3 projects applying get supported, rather than the 1 out of 2 ratio of the past 5 years period.

This will in fact affect the most the new raising type of coproduction from Southeast Europe, which are the co-productions with a more regional perspective, those made between 2, 3 or more countries from the region, on a low to medium budget, intended for local audiences, as those will lag behind more ambitious international projects from leading European talent, which are now a common place on Eurimages's busy agenda.

● Quest for the common market

Key issue in placement of film in the market in Southeast Europe is lack of a sizeable, regulated and sustainable market to do so, along with the fact that there is no concrete public incentive and coordination that would help create it.

Bigger European territories have been facing similar problems since the end of WWII and the start of definite dominance of Hollywood cinema in Europe and the quest for a common domestic market in Europe for European films have been on ever since. Emergence of the EU only strengthened these efforts, which have been channelled through the MEDIA programmes franchise since the early 90's.

The idea of a regional film fund for Southeast Europe has been active since 2004 and the so-called "Ohrid initiative" led by Bosnia and Herzegovina and Serbia, and has been put back on the table another two or three times since, most recently last year in Sarajevo at this same Forum.

Problem that emerged each time the idea was discussed was that it was always based on the principle wherein the respective national public bodies responsible for culture at large, or film specifically, were invited to pool their resources into a regional fund.

Reasons for this rejection are twofold, the first one is practical and that is that the national funds themselves are seriously underfinanced, while the second is political and inherent to national bodies in the field of culture in the region, and that is that they are there to protect national culture and international markets and economic perspective is not on the top of their agenda.

This is also the reason why regional initiatives that concentrated on the industrial aspect of film emerged largely from the civil society, from film festivals or independent producers. However, informed public support is desperately needed in order to convert from enthusiasm into industrial scale systematic action in this matter.

● Inadequate support programmes

Inherently so, national funds in the region have concentrated most of their support on production and very little, or no support at all to the other phases in the chain, whereas the supranational funds or various international sources sporadically active in the rest of the film value chain in the region acted or still act narrowly and never in a tailor-made fashion for the specificities of the region.

The effects of bilateral measures, such as those implemented by Unifrance or German Films in the region are rather small and narrow in their scope as they concentrate on a release of a single French or German film in a respective territory.

Eurimages's distribution scheme has been designed for territories in Eastern and Central Europe that joined the fund in the early 90's, such as Poland and Czech Republic and while the old cinema infrastructure was still in place. The scheme was in place until last year largely unchanged and now it has been reevaluated and relunched with an aim to correspond to the current situation in the eligible countries in Europe's southeast and Russia.

● MEDIA challenge

However, with the immanent ascendance of most of the countries in the SEE region to the MEDIA programme another fundamental issue emerges. Economic differences between many of the countries in the region, especially those of the Western Balkans, and the rest of the countries participating in the MEDIA programme are still vast and only the top players will be able to use the programme and participate on equal basis with their counterparts from the rest of the continent. For example for Bosnian distributors and cinema owners, becoming part of the MEDIA represents both an opportunity and a risk. It is an opportunity because the amount of support funding from the MEDIA program is significantly higher for those who are part of international networks and reach the thresholds, but it is also a risk since it, as a program designed for over thirty different countries, does not show flexibility needed to support fragile markets like the one in Bosnia and Herzegovina and as a result at least one third of the screens in the country, mostly those in economically and socially deprived communities, will lose the support for programming European films because they can not reach the thresholds necessary.

Surely, the new edition of MEDIA or Creative Europe programme will manage to deal with some of these issues, but there is another point that has to do with what the region can do for itself. Subsequent MEDIA programs were designed as to complement support at the national level in all stages of the audio-visual value chain, except the production itself. Hence, support for the development, training, personnel education, promotion, distribution, screening, festivals and other activities related to the advancement of European film and strengthening the market for it. However, member states cannot rely solely on funding from the MEDIA program for their complementary activities, given that for starts MEDIA cannot finance more than 50% of the cost of any project. The purpose of the MEDIA program is to have a well-designed and strong regional/national/local support system, which with its support would be given the opportunity to create added value on the European level. In this sense, closer cooperation in the region becomes even more important. Scandinavia is the best example of how one region, which was strengthened through mutual cooperation, became a major player at the European level.

● **Holistic approach for the audio-visual sector**

Feature fiction films, its authors, producers and financiers are the most visible products and players in the world of cinema, however, the notion of the audio-visual sector is much broader and it encompasses all entities which are engaged in bundling the existing and creating new copyrights in the production process, those exploiting the copyrights in the processes of sales, distribution, merchandising and licensing, as well as those providing the goods and services required for the functioning of this sector. Audio-visual sector comprises cinema (film and video), broadcasting (television) and video games. The approach needs to be holistic, connecting all these fields in the digital world of today, if a serious audio-visual policy is to be implemented.

● **Last, but not the least - the audience**

Audiences do exist for local quality films and other quality audio-visual content, as evidenced by a one or two theatrical hits every other year, TV ratings of local drama and comedy content, film festivals attendance and most accurately by illegal circulation of content on-line and on pirated DVDs. However, education, audience development, piracy reduction, renewal of infrastructure, investment in marketing and smarter business models have not been top priority of audio-visual policies in the region, but if they do become so, the audience can expect an excellent service.

JOVAN MARJANOVIC (LLb, MSc), has been involved in Sarajevo Film Festival since 1999, as a technician and a program coordinator, from 2003 till 2007 he has been the Executive Manager of CineLink Co-production Market and is now on the Festivals Board as the Head of Industry.

He has produced a number of award winning documentaries, short and feature films and is serving as the National Representative of Bosnia and Herzegovina to Eurimages since 2006 and a Member of the Board of Management of the Film Fund Sarajevo. Jovan is also one of the advisors to the Torino Film Lab, a film fund tied to the Torino Film Festival. In 2008 he earned his MSc in film business at Cass Business School in London, UK and is now teaching production at the Academy of Performing Arts of the University of Sarajevo.

A Nordic Experience

Bengt Toll

When influential *The Economist* praised the Nordic countries earlier this year it stated that the region "once synonymous with do-it-yourself furniture and ABBA has even become a cultural heaven, home to "The Killing", *Noma* and *Angry Birds*". Being a Swede I would add the modern tools of circulation, Spotify, Skype and Pirate Bay – the later the notorious file sharing system that really set off piracy but also triggered the rapid swing towards all the legal VOD businesses we see today. Mentioning "The Killing" is interesting though, one of the many "Nordic Noirs", films and TV series that has become international successes, in their own rights or as remakes. The Millennium trilogy, (that sold more than 7 million cinema tickets in Europe), *The Bridge*, *Wallander*, they are all examples of cooperation between the Nordic countries.

Iceland, Norway, Finland, Denmark and Sweden produced almost 200 films last year. The figures include features, creative documentaries and minority co-productions. Most of these films have involvements from one or more of the other Nordic countries. They are co-productions in the strict sense of the word but there is also something far more interesting beyond that – the long tradition of working with neighbours. Not just to fill up some point system needed to close the financing but because talent, experience, skills and equipment cross borders smoothly and regularly in the region, adding an extra exclusive value to the projects. Actors appear on sets in other Nordic countries using their own languages. Norwegian Liv Ullmann and Danish Ghita Norby portraying Swedish characters in Ingmar Bergman films. Max von Sydow did a famous portrait of the Norwegian writer Knut Hamsun in a film directed by Swede Jan Troell. The Danish director Susanne Bier used Swedish actors Rolf Lassgård and Mikael Persbrandt in leading roles in the Oscar nominated *After the Wedding* and in the Oscar winning *A Better World*. And this is just very few of many examples.

When it comes to "slow drama", the long series once aimed for the linear television but today watched in all sorts of windows, it is even more noticeable how talent is shared between the countries and how writers, directors, actors and others take part in the successful development regardless of national origin.

There are the linguistic similarities, and the cultural, that make it easy and there is also a long tradition supported by all sorts of initiatives on different public levels. There is something one could call a Nordic labour market in film and television and if you are in the business you are never too far away neither geographically nor culturally.

Since 1959 there is a joint venture between the Nordic Public Service Broadcasters called Nordvision with the aim to share programming – "what we own, we share". Meaning that in all the five countries TV programmes in all genres, 2700 programmes a last year, are screened. That has meant a sort of awareness of your neighbour as well as created an audience far larger than what your own country can provide. The Nordic population of 25 million people is a huge possibility for the industry and the full potential is by far not reached yet.

The Nordic film and Television Fund was initiated and financed by the Nordic Council of Ministers nearly 25 years ago. The aim was and still is to promote Nordic film of high artistic quality and box office potential through gap financing of Nordic co-productions. 2012 the fund invested 7 million € in features, TV-dramas and creative documentaries and among its most important criteria's is the circulation of products. As producer you need to guarantee distribution in more than one Nordic country. The Film Institutes and the main Broadcasters in the five countries sit on the board and follow up on the work within the fund. But the decisions are made by its CEO. The Nordic Film and Television Fund has meant a lot to foster co-productions and to implement a way of thinking a little bigger. Hanne Palmquist, The CEO, has underlined that the production of film needs a certain critical mass, an industrial logic and points at production companies like Zentropa, home of both Lars von Trier and Susanne Bier

And in relation to the rest world the Nordic region consist of small countries with small languages but cooperation and structure has helped build an impressive industry that has produced films, TV-series and talent for the international market. Most Nordic films are co-productions with one or more of the other Nordic countries and beyond that other European partners. That goes for the larger TV-series as well were the

super indies nowadays looks more often towards the Nordic region.

So is there a special Nordic model? Apart from the closeness and the cultural and historical ties between the countries? I think there are a few things worth mentioning:

- Co-productions in the region are mostly built on relations between producers and long time cooperation between production companies.
- There is a political consensus to support film culture and an political awareness of the necessity of public intervention in the sector in all the Nordic countries.
- The national support systems recognise the importance co-productions, allocating funding for minority co-productions and actively participating in NFTVF and Eurimages.
- NFTVF initiate and foster co-productions stressing the importance of circulation of the works supported.
- The main Broadcasters take an active part in the financing both inside and alongside the public support systems.
- The existence of regional film funds within the countries themselves has played a significant role. The oldest funds have been in place almost as long as the NFTVF. The funds are using public money to create work in the film production sector in a specific geographical part, region, of the country thus attracting, also foreign and mostly Nordic, productions looking for finance. Coming from the outside they need a co- production partner to pull it of locally and to, hopefully, access the national fund. This has facilitated cooperation that has grown into long lasting business relations.
- Nordic meeting venues for the Industry has proven to work in favour of co-productions. One of many examples is the Gothenburg International Film Festival that has had a Nordic focus for more than 20 year and gathers most of the Nordic Industry.

BENGT TOLL is a film producer and a consultant specializing in strategic development within film and other creative industries. He has headed the Gothenburg International Film Festival for 8 years, served as an Industry and International Executive at Film i Väst, was chairman of CineRegio and the CEO of the Swedish Film Institute.

Most recently he has conducted two major studies. One on the future challenges for the Film Industries for the Swedish Government's Counsel for Cultural and Creative Industries and one study on strategic policy's in the field of film and television for the City of Gothenburg, Sweden. In 2009 he did a major study for the Swedish Government on the creation of a new University for Dramatic Arts in Stockholm, Sweden. He is currently part of the team evaluating Eurimages.

Confluence

Miroljub Vučković

Upon being invited as a guest of honour at the “revisited” premiere of Griffith’s *Way Down East* at the Giornate del Cinema Muto film festival in Pordenone, the great Lillian Gish wrote back that she must respectfully decline, saying that the times when she could travel halfway across the globe to meet her fans are long gone. Today we can say that the times of revolutions are also long gone: after all the assorted overthrows, violent “freedom fighting”, revolutions both velvet and pink, there is no time or place for new revolutions. Now is the time of harmonizing. Not just because nowadays there is not enough of that continuous charging up that leads to a revolution, but also because there is no time for a “calm before the storm”. We are constantly under acceleration, created by an extraordinary, yet so acceptable technological developments, which does not leave room for violent changes. We are continually getting desensitized and used to constant change. That which was unimaginable yesterday, has today already become past and getting replaced by new. The changes are too quick to be registered with measly 24 frames per second – we need (for now) binary digits, combining endlessly with limitless speed. Once, the problem was to overcome darkness; today we fight to reign in the light.

Statements by the likes of George Lucas, Steven Spielberg and Steven Soderbergh that they are hesitant to make more films cannot be understood as a call to revolution. Their words point towards a deeper need by renowned authors for their creations to be in harmony with reality.

Not all landscapes on the planet are characterized by a lack of calm before the storm. Not all are equally exposed to constant changes, but all are “free” to constantly adapt. What can we, being in possession of such a lavish history of revolution and change, do for the “common good”, while standing in the shadows of giants, together with or in front of them?

Above all, we could and indeed must look towards Europe, get to know its dominant models and mechanisms. Europe has long been practicing various means of finding and establishing ways of helping: both Eurimages and various MEDIA programs are positive and motivating, constantly evolving and in harmony with reality. These mechanisms are at their most stable and secure when it comes to hardware – the more

“tactile” aspects of the process of supporting audio-visual production. The European models are mostly lacking in sensibility to detect talent and foresee the final outcome of the product (i.e. the work as a layout of facts and a puzzle in time in space) based solely upon documents and data available.

The European funds are not limitless, but are constantly being replenished, from various sources. The philosophical essence of their effectiveness can be found in their mutuality, their use being based on mutual benefits in all phases of production, including the filmmakers’ responsibility to recuperate a percentage of the funds that have been awarded. The nature of these funds is not to appease panhandlers, however objectively poorer they may be. These funds endeavour to create a humanized landscape of audio-visual species – not to hamper the vegetation, but to shape it in a certain way. The audio-visual work is an element of culture – a “cultural species” created from many others, in need of nurture in order to become agreeable and to appropriately reflect the state of mind of a community and to represent that community where necessary.

Our perspective towards European models must be free from any self-pity: “But so much has been destroyed here, the infrastructure is out-of-date, there is poverty everywhere, we are a country in transition...” All these are excuses for impotence. French film industry has created an effective model while at a historical low, right after World War Two – a model that is still prevalent and still being upgraded. Today, France – as well as the USA or China – is a country “in transition”. Nobody is thinking they have created a complete package, a done deal for a permanent and all-encompassing solution.

We must also direct our gaze towards our neighbours – to acquaint ourselves with changes in audio-visual production in Macedonia, Serbia, Slovenia – and, above all, to the level of legal framework establishment and good practices in Croatia. The Audio-visual Center of Croatia has created a system equally efficient and independent (financially, politically and organizationally) through persistent activity. This means that its efficiency relies upon its independence.

A look towards both Europe and our neighbours need not be cast with the goal of appropriating or copying the rules in order to quickly implement them in ex-Yugoslav countries. The goal here is not some synthetic, violent harmonization. Rather, the first activity is to get acquainted with the way our neighbours do things, later followed by harmonization and consequently, new models for cooperation. After this, it should be decided how best to coordinate the efforts of ex-Yugoslav countries in order to create substantial advances in pre-production, production, project development, marketing, promotion... But even more important than this are the funds – whose money it is, where does it come from and how can it be replenished and the amounts increased.

There should be no hidden expectations regarding any kind of financial “protection” and “paternalism” (“Give me SOMETHING and I will give you NOTHING in return). Today, nobody is ready or has the necessary understanding to provide unreserved support and allow the money to be used in ways that are not directly related to creating positive buzz. So, self-protection becomes the best sort of protection, since it so not a synonym for hampered independence.

Werner Herzog once made a film (*Even Dwarfs Started Small*, 1970) that can serve as a convenient and beautiful guide for navigating the labyrinths between reality and possibility. Our experience thus far, the endeavour to create a mini Eurimages for ex-Yugoslavia, or a Fund for Micro budget production Support, or a Promotion Fund (there have already been tangible results – a joint appearance at the South East European countries Pavilion at the Cannes Market) have always relied on a high level of discussion and a low level of efficiency. Also, it was understood that the national budgets should be the primary source of financing these hypothetical fund.

Thus, experience teaches us that derivatives of homogenization should be looked for by single induction – bottom-up. Ministries of Culture should not be weighed down with new expenditures. We should speak directly to various users – video platforms, TV stations, VOD providers. We should seek the support of banks curious to try something new and suggest them to sponsor the awards for clearly defined projects, selected at a fair and open competition. And of course, this must be followed by rigorous oversight of the artistic and market performance of the products created with the fund's help.

Zora Korać, the legendary editor of TV Belgrade, has tested the strength of the system with her series *Optional* and also discovered several important authors in the countries of Ex-Yugoslavia. It is time for the optional to become standard practice.

MIROLJUB VUČKOVIĆ Born November 23, 1952. Promoter of film, journalist (cinema and art), writer, author of TV programs, festival adviser. Member of European Film Academy, Responsible for promotion and international relations at Film Center Serbia, Representative of Serbia in Eurimages, (2008 – 2012), Acting director of Film Center Serbia (2005-2012), Founder and Director of east west Crossings Promotion Fund, Chairman of South-East European Cinema Network (2001 – 2005), Artistic Director of Belgrade International Film Festival (1997 – 2010), General Manager of Institut za film (Yugoslav/Serbian Film Institute, 1995 – 2005). From 1979 engaged on various researches and projects of the Yugoslav Film Institute, as retrospective of the Yugoslav films at Centre Georges Pompidou in Paris, Cinematheque Royale in Brussels, Giornate del cinema muto in Pordenone. Published popular articles and professional film essays in different domestic and foreign dailies and periodicals. Film critic and author of the monthly TV program (1995 - 1998) *Cinema Art*.

Is It Time for South Eastern Europe Film Agencies Directors Network - Seefad*?

Jožko Rutar

As the cooperation in the field of film production in Southeast Europe is getting stronger and more active every year, the question is whether it is time to establish a coordination body of film agencies or funds from the region itself.

As a member of EFAD (European Film Agencies Directors), an informal body of national film agencies of member states of European Union, I can confirm that such a body or a network if you like is needed and even crucial when lobbying for or against crucial political decisions taken by the Brussels administration. Main tasks discussed on annual meetings, that are traditionally scheduled during festivals in Berlin, Cannes and San Sebastian, are the EU regulations in the field of cinema. In the last year two main focuses were on a new Draft of Cinema Communication, document issued by Competition Directorate of EU, which regulates state aids in the field of Audiovisual in Europe. We are all aware that Cinema Sector is on the edge between Culture and Industry. There are strong opponents from overseas, who want a complete liberalization on one hand and on the other hand want that incentives for film production reduced and regulated.

EFAD Declarations and comments on EC documents are very important, as they show strong, usually unanimously support of leading professionals against Commission proposals and policy decisions, as well as compromise and better proposals. It is also true that game is run by big member states with strong film industries and long traditions, whose representatives also have a strong personal professional background.

Second case of the last year was, when the Cultural Exception was proposed to be excluded from new Transatlantic Free Trade Negotiations between USA and EU. The idea was blocked by France and some other member states in the last moment in June.

Another network where I was included recently is BPX – Best Practice Exchange, where on the initiative of Simon Perry and Katriel Schory, a 3-day workshop

was organized for the individuals – principals of national, regional and supranational film agencies, who are responsible for sustainable filmmaking outside of centres like Hollywood Bollywood. A 3-day brainstorm and best practices exchange was very useful and inspiring for all the participants from around the globe and crucial dilemmas for the future of cinema were discussed.

● How I see SEEFAD network?

Regional cooperation on the field of Cinema is developing from year to year. High level of co-productions, joint Pavilion in Cannes and other actions are good basis for establishing an informal body, which can discuss urgent and strategic matters of Cinema development in the region. Three to four meetings annually, with focus on the practical and urgent matters, can improve cooperation between our respective industries. Focus on co-productions, distribution, cultural education and audience building, are among first steps towards more synchronised policies in financing production and human resources development. Exchange of best practices and discussion about problems we all share in the time of crisis, searching for new windows of financing film and Audiovisual as well as other topics can be put on the table. Directors of film agencies are usually persons, who must have the best overview on the sector and could be also great source of information about their country. We are all aware of the strengths of a professional network in film and such initiative can just be the right thing to further our main goal: to create environment and conditions for growth of the sector, to develop talents and creativity and to promote and support cultural diversity, both in formal and informal ways.

* Title is not intention to propose the name of possible future initiative.

JOŽKO RUTAR (1970) After graduation from the Faculty of Economics at University in Ljubljana he starts to work as a producer of cultural events and performances. He worked with the dance group EN-KNAP for five years as a producer of dance performances and films. In 2004 he joined the STARAGARA Production company and produced several feature, short and documentary films. EAVE graduate. Member of Board of Slovenian AV collecting society AIPA and European Film Academy. In 2011 Government of Slovenia appointed him director of the Slovenian Film Centre.

Reciprocity in Coproductions Between the Countries of Ex-Yugoslavia

Sanja Ravlić

"There are lies, damned lies and statistics"
Mark Twain

Looking at the statistics that were compiled for the first time and presented in Table A below for the purposes of this publication, we can easily identify a couple of trends:

a) the support for minority productions for the productions originating in one of the ex-Yu countries constitutes on the average a lion share of all minority co-production funding in the countries encompassed by this survey – Slovenia, Croatia, Bosnia and Herzegovina, Serbia and Macedonia. It is a numerical validation of the self-evident truth that the countries of the Ex-Yu are «natural» co-producing partners.

b) the overall amount awarded to minority co-productions in all the countries combined fluctuates from year to year but since 2006, with exception of a strangely anomalous 2009, represents on the average a production investment well above 500,000 Euros per year.

c) the number of projects and the amounts of support per project vary from country to country and from year to year, signalling a lack of consistent long-term national policies towards minority co-production funding in terms of number of titles supported per year, but more significantly in terms of the level of support per project.

d) On the average more than 50% of the minority co-productions supported by respective countries were multilateral co-productions mainly, but not exclusively between the countries of ex-Yu and more than 50% of all co-productions supported since 2004 received additional supranational support from Eurimages.

While all this could be regarded as a mark of success in co-operation in between these countries, differing support decision schedules, as well as differing amounts of support awarded per project from country to country are proving, as the time goes by, more and more of an obstacle to further successful co-operation in between the countries. If we were to add to that different spending requirements for minority co-productions, as well as difference in available other sources of financing in respective countries, it is natural that the question of reciprocity or rather how should we define it and implement it subsequently, has become a pressing topic worthy of an informed discussion

between national film funding bodies in the countries of ex-Yugoslavia.

● The challenges we face when we try to define the principle of reciprocity

Most of the existing bilateral co-production treaties in between countries specifically mention the principle of reciprocity and very often put in place the mechanisms of its oversight over a mutually agreed period of time. Such is not the case with bilateral or multilateral co-productions made under the European Convention on Cinematographic Co-production, under which most of the bilateral or multilateral co-productions in between the countries of ex-Yugoslavia are made. The reason for it is very simple: the Convention was put in place to provide a legal framework primarily for multilateral co-productions, even though it very often serves as a legal point of reference for bilateral co-productions in between the countries when there are no bilateral co-production agreements in place.

But even in the cases when well-meant mechanisms of oversight of reciprocity are built into a text of the bilateral treaties, the situation on the ground is far more complex and presents numerous challenges. Though it might be argued that the principle of reciprocity per se is a just thing, sometimes reconciling the demand of maintaining the principle of reciprocity with what is on offer in terms of projects is very difficult. All the European national film funds, even a supranational production funding body such as Eurimages, operate primarily selective funding schemes. And it is a common consensus that in a selective scheme, the most important criteria is the artistic quality of the project, coupled with its production values, as well as its potential for circulation either or both in the cinemas or on the festival circuit. Maintaining the arithmetic balance, a neat ledger book in between two countries sometimes comes into that equation, but the experience tells us it is very rarely a decisive factor in a selection process.

So maybe, we are actually talking about squaring the circle: how do we reconcile what our talent has to offer with principles of fairness and good neighbourly relations?

I am afraid that the answer to this somewhat rhetorical question is: with great difficulty.

Still it can be argued that there are some steps that national film funds can concurrently take in order to create more of a level playing field for producers. And for that purpose it might be worth looking into what I shall call, for the purposes of this examination, a «Croatian example».

● A Croatian example 2010-2012

In 2010, The Croatian Audiovisual Centre, a national funding and strategic agency for the audiovisual sector in Croatia started to implement a strategic plan for the audiovisual industry (2010-2014), which defined main strategic goals for the four year period in question. One of those main strategic goals was maintaining and developing production, distribution, exhibition, broadcasting and promotion of culturally relevant audiovisual works, and one of the objectives encouraging wider and more effective participation of Croatian filmmakers in international co-productions. In order to achieve that we did the following:

- a) We earmarked a yearly percentage of up to 15% of the overall production budget of the Centre for minority co-productions, because we strongly believe that co-producing is a two or should we say three way street benefiting all of those involved on many levels, and that minority co-production funding should not be an afterthought, something that is considered only after the majority national projects are taken care of but should constitute an integral part of the fund's production strategy
- b) We broadened the scope of projects eligible for minority co-production support from feature films to documentaries, shorts and animation because first

of all, it seemed fair and consistent with our policy of trying to treat all the filmmakers and all the genres with the same amount of respect and consideration

c) We significantly raised the amount of support per project, aiming at least 10% of the project's production budget, because we realized that Croatian producers needed a head-start in order to participate effectively as minority co-producers in official co-productions eligible for Eurimages support.

d) We introduced an open call for proposals with 4 yearly submission deadlines, in synch with Eurimages' yearly submission calendar in order to speed up things for producers and give them the opportunity to become co-producing partners

The results of this policy that has been in place since 2010 are, in our opinion, encouraging, though we are not exempt from criticism at home where still, despite our best efforts, a prevailing perception of minority co-productions is of something of a lesser importance. This public perception is not confined either to Croatia or the countries of ex-Yugoslavia but it is a subject of the on-going debate all over Europe and presents a continuing challenge for European film funds. Paradoxically, or maybe not so paradoxically, in a more and more united and unified Europe, the issues of identity and origin, albeit often differently defined from country to country and from case to case, sometimes in terms of the story, sometimes in terms of the talent, and sometimes in terms of pure financial contribution are becoming more and more a bone of contention.

Is this a problem or a challenge?

Overview of investments by public funds in former Yugoslavia into minority coproductions between the countries 

SANJA RAVLIĆ has extensive experience in the audiovisual sector, as a script editor, producer and consultant. She began her career in 1987 as a Script Editor and Associate Producer at the Drama Department of Croatian Radiotelevision (HRT), supervising and producing a number of television films and drama series, including several international television drama co-productions.

In 1994 she left Croatia for the UK to attend 3-year full-time Producing Course at the National Film and Television School (NFTS). Upon graduation, she worked in the UK and Croatia, both as independent film producer and radio producer for the BBC World Service and as a supervising series producer on the Croatian edition of the BBC's popular game show The Weakest Link. In October 2007, she joined the core team of the newly founded Croatian Audiovisual Centre, the governing film agency in Croatia, where she works to this day.

From March 2010 till June 2012 she was Head of Development of the Croatian Audiovisual Centre and in January 2013 she was appointed Head of Co-productions. She is also a member of the Croatian Audiovisual Centre's Committee for the Encouragement of Investment in Production of Audiovisual works which manages Croatia's audiovisual production cash rebate scheme, as well as the co-author of the Croatian National Strategic Programme for the Audiovisual Industry 2010 – 2014. Sanja is Croatia's national representative on the Board of Management of Eurimages, since 2008, a member of the European Film Academy and a member of the Programme Advisory Council of the Croatian public broadcaster; Croatian Radiotelevision.

OVERVIEW OF INVESTMENTS BY PUBLIC FUNDS IN FORMER YUGOSLAVIA INTO MINORITY COPRODUCTIONS BETWEEN THE COUNTRIES

	COUNTRY	no. of minority co-prods supported	delegate producer from ex-yu country	bilateral co-prods	multilateral co-prods	supported by eurimages
2004	SLOVENIA		0	0	0	0
	CROATIA	1	1	0	1	1
	BOSNIA AND HERZEGOVINA	2	2	1	1	0
	SERBIA	0	0	0	0	0
	MACEDONIA	2	1	0	1	1
	TOTAL					
2005	SLOVENIA*	3	2	0	2	0
	CROATIA	0	0	0	0	0
	BOSNIA AND HERZEGOVINA	2	2	1	1	0
	SRBIJA	2	0	0	0	0
	MACEDONIA	0	0	0	0	0
	TOTAL					
2006	SLOVENIA	2	2	0	2	2
	CROATIA	3	3	1	2	1
	BOSNIA AND HERZEGOVINA	4	4	1	3	1
	SERBIA	0	0	0	0	1
	MACEDONIA	0	0	0	0	0
	TOTAL					
2007	SLOVENIA	2	1	0	1	1
	CROATIA	4	3	0	3	2
	BOSNIA AND HERZEGOVINA	2	2	0	2	2
	SERBIA	2	2	1	1	1
	MACEDONIA	1	0	0	0	0
	TOTAL					
2008	SLOVENIA	3	3	0	3	3
	CROATIA	4	2	1	1	1
	BOSNIA AND HERZEGOVINA	1	1	0	1	0
	SERBIA	2	2	2	0	1
	MACEDONIA	3	1	0	1	1
	TOTAL			3	6	6
2009	SLOVENIA	1	0	0	0	0
	CROATIA	0	0	0	0	0
	BOSNIA AND HERZEGOVINA	0	0	0	0	0
	SERBIA	3	3	0	3	0
	MACEDONIA	3	0	0	0	0
	TOTAL					
2010	SLOVENIA	1	1	0	1	1
	CROATIA	6	5	3	2	1
	BOSNIA AND HERZEGOVINA	2	2	1	1	0
	SERBIA	5	5	1	4	3
	MACEDONIA	2	1	0	1	1
	TOTAL					
2011	SLOVENIA	3	1	0	1	1
	CROATIA	5	3	0	3	1
	BOSNIA AND HERZEGOVINA	2	2	1	1	0
	SERBIA	3	3	1	2	2
	MACEDONIA	3	2	0	2	2
	TOTAL					
2012	SLOVENIA	5	4	1	3	3
	CROATIA	6	5	1	4	2
	BOSNIA AND HERZEGOVINA	2	2	1	1	0
	SERBIA	3	3	1	2	2
	MACEDONIA	2	1	0	1	1
	TOTAL					
2013	SLOVENIA*	6	4	1	3	0
	CROATIA**	3	3	0	3	1
	BOSNIA AND HERZEGOVINA	0	0	0	0	0
	SERBIA	5	5	0	5	0
	MACEDONIA	2	2	0	2	0
	TOTAL 2013					
TOTAL 2004-2013						

total amount available	minimum amount of support	maximum amount of support	average amount of support
€ 0	€ 0	€ 0	€ 0
€ 26,720	€ 26,720	€ 26,720	€ 26,720
€ 51,282	€ 25,641	€ 25,641	€ 25,641
€ 0	€ 0	€ 0	€ 0
€ 250,000	€ 250,000	€ 250,000	€ 250,000
€ 328,002			
€ 341,576	€ 150,000	€ 191,576	€ 170,788
€ 0	€ 0	€ 0	€ 0
€ 102,564	€ 51,282	€ 51,282	€ 51,282
€ 0	€ 0	€ 0	€ 0
€ 0	€ 0	€ 0	€ 0
€ 444,140			
€ 197,938	€ 58,333	€ 139,605	€ 98,969
€ 78,000	€ 26,000	€ 26,000	€ 26,000
€ 153,845	€ 33,333	€ 51,282	€ 38,461
€ 192,700	€ 52,700	€ 140,000	€ 96,350
€ 0	€ 0	€ 0	€ 0
€ 622,483			
€ 116,280	€ 116,280	€ 116,280	€ 116,280
€ 100,000	€ 26,000	€ 40,000	€ 33,000
€ 788,718	€ 763,077	€ 25,641	€ 394,359
€ 232,000	€ 110,000	€ 122,000	€ 116,000
€ 0	€ 0	€ 0	€ 0
€ 1,236,998			
€ 356,519	87446	€ 140,728	€ 118,839
€ 93,333	€ 33,333	€ 60,000	€ 46,666
€ 102,564	€ 102,564	€ 102,564	€ 102,564
€ 105,000	€ 35,000	€ 70,000	€ 52,500
€ 97,561	€ 97,561	€ 97,561	€ 97,561
€ 754,977			
€ 0	€ 0	€ 0	€ 0
€ 0	€ 0	€ 0	€ 0
€ 0	€ 0	€ 0	€ 0
€ 100,900	€ 31,600	€ 35,000	€ 33,600
€ 0	€ 0	€ 0	€ 0
€ 100,900			
€ 200,000	€ 200,000	€ 2,000,000	€ 200,000
€ 472,000	€ 80,000	€ 121,666	€ 94,400
€ 282,051	€ 76,923	€ 205,128	€ 141,025
€ 0	€ 0	€ 0	€ 0
€ 97,561	€ 97,561	€ 97,561	€ 97,561
€ 1,051,612			
€ 51,000	€ 51,000	€ 51,000	€ 51,000
€ 295,000	€ 62,000	€ 133,200	€ 98,333
€ 51,282	€ 25,641	€ 25,641	€ 25,641
€ 179,000	€ 29,000	€ 80,000	€ 59,000
€ 162,602	€ 81,301	€ 81,301	€ 81,301
€ 738,884			
€ 195,000	€ 15,000	€ 80,000	€ 48,750
€ 480,000	€ 80,000	€ 12,000	€ 96,000
€ 38,462	€ 17,949	€ 20,513	€ 19,231
€ 184,000	€ 44,000	€ 70,000	€ 61,000.00
€ 81,301	€ 81,301	€ 81,301	€ 81,301
€ 978,763			
€ 429,900	€ 70,000	€ 121,000	€ 107,475
€ 257,000	€ 57,000	€ 100,000	€ 85,666
€ 0	€ 0	€ 0	€ 0
€ 241,000	€ 48,200	€ 48,200	€ 48,200
€ 162,602	€ 81,301	€ 81,301	€ 81,301
€ 1,090,502			
€ 7,347,261			

*Slovenia - slovenia film centre awards only; year 2013 includes next two years - 2014 and 2015
** croatian national film funding body - havc runs an open call for proposals with 4 yearly deadlines
- these are the numbers for 2 calls for proposals for 2013.

Cultural Policy: How to Boost the Impact of Creative Industries on Local Societies and Economies?

Berlinale as a Motor for Arts & Business

Thomas Hailer

Berlin: an exciting, cosmopolitan cultural hub that never ceases to attract artists from around the world. A diverse cultural scene, a critical public and an audience of film-lovers characterise the city. In the middle of it all, the Berlinale: a great cultural event and one of the most important dates for the international film industry. More than 300,000 sold tickets, almost 20,000 professional visitors from 124 countries, including around 3,700 journalists: art, glamour, creativity, parties and business are all inseparably linked at the Berlinale.

The Berlin International Film Festival is a source of inspiration not only for the global film community: film programmes, workshops, panel discussions, joint projects with other social and cultural players – the offers for cooperation and the possibilities for creative interaction are countless.

The public programme of the Berlin International Film Festival shows about 400 films per year, mostly international or European premieres. Films of every genre, length and format find their place in the various sections: outstanding international cinema in the Competition, independent and art house in Panorama, films for young audiences in Generation, new discoveries from the German film scene in Perspektive Deutsches Kino, avant garde, experimental and unfamiliar cinematography in the Forum and Forum Expanded, and an exploration of cinematic possibilities in Berlinale Shorts. Food, pleasure and the environment are the topics that lie at the centre of the Culinary Cinema.

The programme is rounded out by a Retrospective which focuses on the oeuvre of a great personality of cinema or a relevant chapter in film history.

The most important industrial meeting point is the European Film Market (EFM). Around 400 companies and more than 8,000 professionals from 95 countries build and foster contacts here, strengthen their position in the industry or negotiate film rights. The Berlinale Talent Campus brings high profile professionals attending the Berlinale to workshops and discussions with 350 promising young film talents from all over the world.

Since Dieter Kosslick became Festival Director in 2001 the economic impact of the Berlinale grew significantly. New innovative formats, the growing media attention and a dedicated marketing & sponsoring strategy attracted local and international industry partners. In 12 years Berlinale was able to significantly increase its sponsoring revenues.

At the same time the festival's impact on the gross domestic product of the city of Berlin can't be underestimated. For the 63rd festival edition in 2013, the business development and promotion bank of the Federal Land of Berlin evaluated a direct consumption impulse of approx. 70m €, 380 additional jobs and 13m € additional public revenues.

There is no doubt that the festival has a positive impact on Berlin's international image and its local economic and cultural environment.

THOMAS HAILER is the programme manager of the Berlin International Film Festival.

Born in 1959, he studied theatre and German literature in Munich. In 1983 Thomas Hailer joined the artistic direction of the independent musical theatre ensemble Bolschoi Berlin. As a director he joined to Thuringia state theatre in Rudolstadt. In 1993 he contributed to the development of the dance theatre in Stadttheater Giessen as a dramatic advisor. Since 1995, Hailer has worked as a script consultant with a focus on children's film. In 2002, he became director of the Berlinale Kinderfilmfest section. Two years later the programme was expanded to include youths with the introduction of the 14plus competition. In 2007 this led to the new section name Generation. Since May 2008, Thomas Hailer has been supporting the festival director in all issues related to the programme as programme manager and is also responsible for synchronization of programme-related communication between the sections and departments of the Berlinale.

How to Boost the Impact of Creative Industries on Local Societies and Economies?

Dave Moutrey

At the outset I should point out that I am neither an economist nor a historian just an arts manager who has lived and worked in the same city for 30 years. I always hesitate in case someone thinks I am setting myself up as some sort of expert. What you are about to read is simply an outline of the world as I have seen it over in 30 years of working in Manchester, which hopefully is an authentic view that may help you think about your own situation.

To understand the current relationship between creative industries on local society and the economy it is important to know something of the city's past.

Manchester is a post-industrial city on the North of England. It is part of a larger conurbation of Greater Manchester which includes the city of Salford and towns of Bury, Bolton, Trafford, Wigan, Stockport, Tameside, Oldham and Rochdale and it is hard to see where one town ends and another one starts. The total population of Greater Manchester is about 2.6m people.

Manchester was the home of the Industrial Revolution. Cotton was at the centre of the huge growth and the city's economy between the 1750's and 1960's. In 1913 65% of the world's cotton was processed in Manchester. It is a city of ideas. Mr. Rolls met Mr. Royce in Manchester to start the famous automobile company. Friedrich Engels wrote *The Condition of the Working Class in Manchester* and Karl Marx met Engels in Chetham's Library. The first Trades Union Conference took place in the city, the same city that had such a huge impact on the notions of Free Trade. The world's first railways station was in Manchester and it was the place where scientists first split the atom.

Alongside the economic growth of the city it developed a cosmopolitan atmosphere and vibrant culture which included establishing the Hallé Orchestra, the world's first public municipal park and public lending library.

The city fell into economic decline during the 1970's. Heavy industry suffered a downturn from the 1960's and was greatly reduced under the economic policies followed by Margaret Thatcher's government after 1979. Manchester lost 150,000 jobs in manufacturing between 1961 and 1983. Regeneration started in the

1980's much of it fueled by new self belief created on the back of the Manchester music scene, the growth of the Higher Education sector and two failed yet effective bids to host the Olympic Games. However, the pace of regeneration increased significantly on the back of two key events, the huge terrorist bomb in June 1996 that damaged a large part of the city centre and the XVII Commonwealth Games which was the largest multi-sport event staged in the UK prior to the 2012 Olympics.

The Games were considered a success for the host city, providing an event to showcase the transformation of Manchester following the 1996 bombing. The Games formed the catalyst for the widespread regeneration and heavy development of Manchester, and bolstered its reputation as a European and global city internationally. Rapid economic development and continued urban regeneration of the now post-industrial Manchester continued after the Games which helped cement its place as one of the principal cultural cities in the United Kingdom¹.

It was the success of the Commonwealth Games in 2002 that paved the way for further sustained growth on the cultural sector. Manchester saw great benefits from presenting a games with an economic and social legacy for the city. All of this was built in a unique public and private sector partnership. In the run up to the games the city's leadership set out to ensure that the momentum would not be lost once they were over. Together with regional and national sports agencies, the city's leaders worked to establish national centres of excellence in sport at various games facilities to give them a life after the games were over. The most notable is the Manchester Velodrome where the British Cycling Team has been based since 2002. The main athletics stadium was altered for Manchester City Football Club to relocate to and secure overseas investment from the Emirates. Following the Commonwealth Games the BBC took the decision to move a large part of the organisation from London to Manchester which led to the creation of MediaCity in Salford.

To help their post-games thinking the City commissioned a series of reports to help focus economic

1. http://en.wikipedia.org/wiki/2002_Commonwealth_Games

strategy which culminated in Creating an Ideopolis² by the Work Foundation. They defined an Ideopolis as a sustainable knowledge intensive city that drives growth in the wider city-region. It has:

- High levels of economic success
- High levels of knowledge intensity
- A diverse industry base including distinctive specialist niches
- A university that has a mutually beneficial relationship with the city, leading to building industries based on research strengths, transferring knowledge to businesses and the retention of graduates
- Strong communications infrastructure and good transport links within the city and to other cities, including air, rail and road
- A distinctive long-term 'knowledge city' offer to investors and individuals alike, created by public and private sector leaders
- Strategies to ensure that deprived communities also benefit from the economic success associated with knowledge

The Work Foundation identified nine Ideopolis

1. Investing in the physical knowledge city: having the architecture and accommodation that knowledge-intensive businesses and workers require. This includes commercial and residential accommodation, public buildings, infrastructure and public space.
2. Building on what's there: recognising a city's existing strengths and weaknesses and playing to these.
3. Diverse specialisation: developing a reputation for excellence in a limited number of industries (but definitely more than one).
4. High skill organisations: attracting and retaining organisations that rely on the 'high road' to productivity through high quality jobs and highly skilled people.
5. A vibrant education sector: One or more universities linking closely with the city and businesses, supported by good education institutions and helping all individuals to develop their skills.
6. A distinctive 'knowledge city' offer: A distinctive offer for knowledge intensive businesses and workers who are considering investing, working and living in the city, supported by diverse cultural and leisure facilities. Complementing but being distinct from nearby cities.
7. Leveraging strong connectivity: Good communications infrastructure combined with quick links both within the city and to other cities via air, rail and road.
8. Strong leadership around a knowledge city vision: civic leadership around the vision based on strong networks across the public, private and community sectors.

9. Investing in communities: A determination to tackle social exclusion and ensure that the fruits of growth are equitably shared, alongside a commitment to invest in the most deprived communities.

Culture was seen to be important to the city's economy growth strategy. Firstly, it was part of creating a distinctive 'knowledge city' offer and secondly was also important an economic sector in its own right with significant numbers of cultural and creative micro-businesses and SME's in the city region.

Alongside the growth in sporting infrastructure the city therefore wanted to support and encourage the growth of cultural and creative industries. As mentioned earlier, during the city's economic heyday culture had been an important part of its identity. In recent years this had been mostly sport (Manchester United and the Commonwealth Games) and music, (Simply Red, New Order, Happy Mondays and Stone Roses).

As a result of their desire to support the Ideopolis approach and see Manchester promoted in the UK and abroad as a cultural as well as a sporting city they established Manchester International Festival in 2007. Then in 2008 the global economic crash happened and in 2010 a new coalition government took charge of the country and introduced far reaching austerity measures. Their policies led to significant cuts in government funding and the arts were not excluded. However, Manchester continued to think differently.

Manchester continues to see the importance of cultural and creative industries to the economic growth of the city. From the Bridgewater Hall to the creation of Urbis, Manchester is already an exemplar of cultural regeneration. The City Council is committed to putting culture at the heart of its regeneration plans, as vital fuel for the local economy, supporting jobs, developing talent and skills and attracting inward investment, business visitors and tourists.

In March 2015, a new 6,500 m² purpose-built centre for international contemporary art, theatre, film and books will open its doors for the first time in Manchester, as part of the vibrant new First Street development. It will be called HOME. At a time when the arts world is facing severe cuts, this is a tremendous opportunity, which will help support and attract jobs as well as helping to put Manchester firmly on the map a leading cultural destination.

HOME is being designed and built to house a new organisation formed by the merger of two of Manchester's best-loved arts organisations, Cornerhouse and the Library Theatre Company.

Cornerhouse is Manchester's international centre for contemporary visual arts and culturally diverse inde-

pendent film. It was founded by the Greater Manchester Visual Arts Trust, chaired by Sir Bob Scott, opened in 1985 and has subsequently been at the forefront of Manchester's vibrant cultural scene ever since. Cornerhouse welcomes over 500,000 visitors every year, and in 2010/11 it achieved some of its best ever visitor statistics. More than 90,000 people attended exhibitions, it presented 3,833 film screenings seen by more than 129,000 people and over 16,000 took part in our wide variety of engagement events that cross-cut all programme areas.

The Library Theatre Company was founded in 1952 and is the major producer of contemporary drama in the North West. Since its inception it has been directly managed by Manchester City Council but changed with the merger with Cornerhouse in April 2012.

The Company has been in transition since leaving its base at the Library Theatre in July 2010 and establishing its new city centre home in 2015, in partnership with Cornerhouse. It currently produces three major productions a year at the Lowry (including a Christmas slot), and a diverse participation programme from its temporary base at Cornerhouse.

The new venue for the new arts organisation will be situated at the heart of the 20-acre First Street site, and will be the anchor for a dynamic new creative quarter, drawing together the creative energy emerging from Knott Mill to the west and Hotspur Press to the east. This innovative and ambitious regeneration project that also includes 116,128 m² of commercial space will play a vital role in the city's economic future, attracting additional leisure and retail investment and unlocking 10,000 jobs.

HOME's two new theatres - a 500 seat theatre and a 150 seat flexible studio space - will be a playful brand and platform for new, commissioned work. The five cinema screens will show challenging, independent work. The 500m² 4m high gallery space will be home to the very best in contemporary art. The café bar and restaurant will offer delicious food and inviting spaces to relax and discuss in.

HOME will be a centre for co-production, artistic creation and sharing. It will be dedicated to learning for people of all ages. A place for new work and playful ideas; of festivals and commissions; of artists and of audience engagement.

Manchester City Council has already committed £19 million to fund the creation of HOME. The overall budget for the project has been confirmed at £25 million with the remaining £6 million being met by external partners - £1 million through fundraising and a further £5 million of Arts Council England funding.

The City of Manchester's commitment to arts and culture as central to the city's economic growth strategy remains strong and the benefits can be seen, *Manchester tops the Boho Britain index of the UK's 40 largest cities as a result of its mix of ethnic diversity, gay friendliness and technological innovation*³. Manchester is also the third-most visited city in the UK by foreign visitors, after London and Edinburgh, and the most visited in England outside London and is ranked as a beta world city by the Globalization and World Cities Research Network⁴. It is the fastest growing city in England and one of the biggest economies in the UK. Culture remains an important part of this.

DAVE MOUTREY Director & Chief Executive, Cornerhouse & Library Theatre Company

Dave Moutrey is Director and Chief Executive of the recently merged Cornerhouse and Library Theatre Company and is leading a project to create their new purpose built venue that will open in 2014. The merger created an entirely new production based multi-artform organization that currently trades under the two constituent brands. In the new building the organisation will function as one entity under a single new name. Dave joined Cornerhouse in 1998 after eight years as Chief Executive of Arts About Manchester (now All About Audiences) the regional arts marketing and audience development agency. Dave had previously managed the Abraham Moss Centre Theatre in North Manchester. He is a qualified drama teacher and was until recently a practising artist and theatre producer who has worked on over 30 community productions with Greater Manchester based groups. Dave is a Fellow of the RSA and a member of the Chartered Management Institute, the British Academy of Film and Television Arts, and the Association of British Theatre Technicians. He is Company Secretary to the Association of Independent Cinema Exhibitors, Cinema Arts Network Ltd, exposures Film Festival, and the Abandon Normal Devices Festival

3. http://www.demos.co.uk/press_releases/bohobritain

4. "The World According to GaWC 2010". Globalization and World Cities Research Network. Retrieved 18 September 2011.

Edinburgh's Festivals – the Success of Collaboration

Ken Hay

● Edinburgh: A City For Festivals

Edinburgh's Festivals are Scotland's world-leading cultural brands with expertise, vision, impact and international recognition unmatched by any other cultural events on the globe.

The Festivals are distinctively Scottish and yet profoundly international, drawing artists, audiences and media from every continent and over 70 countries each year. They are cultural platforms, forums for national and international debate, economic power-houses, drivers of ambition and creators of cohesion. They represent Scotland at its most confident, its most open and its most creative.

Edinburgh's reputation as the world's leading festival city has deep roots. Since 1947 saw the Edinburgh International Festival established as a much-needed 'platform for the flowering of the human spirit' with the Edinburgh International Film Festival and Fringe starting the same year, the Edinburgh Festivals have evolved into an operation that involves 12 major individual festivals, hosts over 25,000 international artists, more than 1,000 accredited media and audiences of over 4 million, while generating €305m for the Scottish economy.

Today what happens in Edinburgh could not happen anywhere else. The city's rich architectural heritage is complemented by a dynamic contemporary building programme which creates an incredible range of festival spaces. UNESCO World Heritage Status was granted in 1995 for the contrast of the antique charm of the Old Town (from the year 1074 onwards) and the formal grandeur of the New Town (1759 onwards).

The Festivals literally and distinctively inhabit every corner of the historic heart of the city – every theatre, every hall, every courtyard, every basement, every park. From the Castle Esplanade to the ancient backstreets of the medieval Old Town, from the grand gardens of the 18th century Charlotte Square to the narrow, cobbled side streets off the Royal Mile, from the grandeur of the Festival Theatre to the dark intimacy of the city's Masonic Halls. This delicious density, this wealth of choice for visitors and locals alike, has been allowed to flourish and thrive with the backing of the Scottish Government, City of Edinburgh Council, Creative Scotland, British Council, EventScotland and

Scottish Enterprise – all of which have supported the Festivals as well as the ambition and vision of their directors.

An Events Planning and Operations Group is co-ordinated by the City of Edinburgh Council and together with the work of its Events Team, the Arts and Learning Team, the Public Safety Team, the Licensing Division, the Culture and Sport Division, the Economic Development Division – and a number of other officers across environmental health, parks and libraries – the Council plays a crucial role in delivery of the Festivals. This infrastructure, together with the role of the many high ranking Council officials who act as Board members and Trustees of the individual Festivals, creates the unique environment that allows the world's favourite festival city to flourish.

● Edinburgh's Festivals: A Collaborative Story

Individually, each of Edinburgh's Festivals is a leading cultural brand in its respective field. Together, they are an unparalleled cultural, marketing and media phenomena which create millions of attendances, hundreds of millions of media viewers, cultivate complex and enviable brand partnerships, and generate acres of press coverage across national and international markets.

Building on a culture of collaborative working the Directors of Edinburgh's twelve leading Festivals came together in 2007 to create Festivals Edinburgh with a mission to support Edinburgh's Festivals in sustaining and developing our position as the world's leading festival city, through:

- development and delivery of collaborative projects and initiatives which support growth, product development, leadership and audiences
- acting on behalf of and representing the collective strengths of the Edinburgh Festivals

As well as being the result of the shared understanding, the will and the ambition of its constituent Festivals and Directors, the creation of Festivals Edinburgh was also galvanised by three key documents:

- the City of Edinburgh Council's Festivals Strategy
- the subsequent Economic Impact Evaluation of Edinburgh's key Festivals

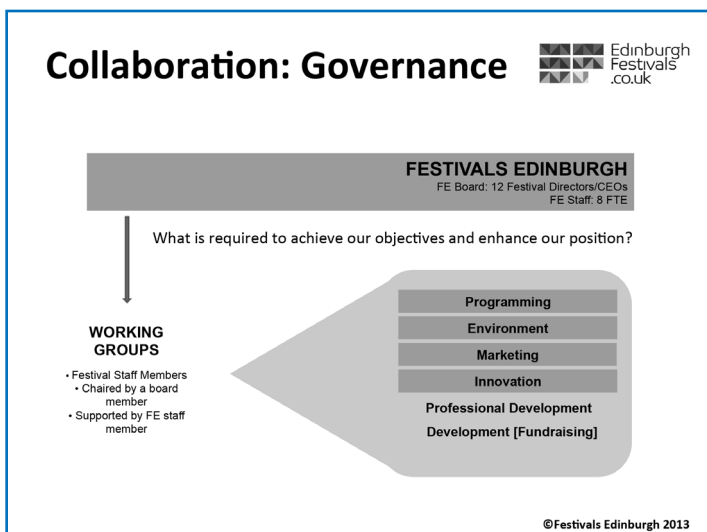
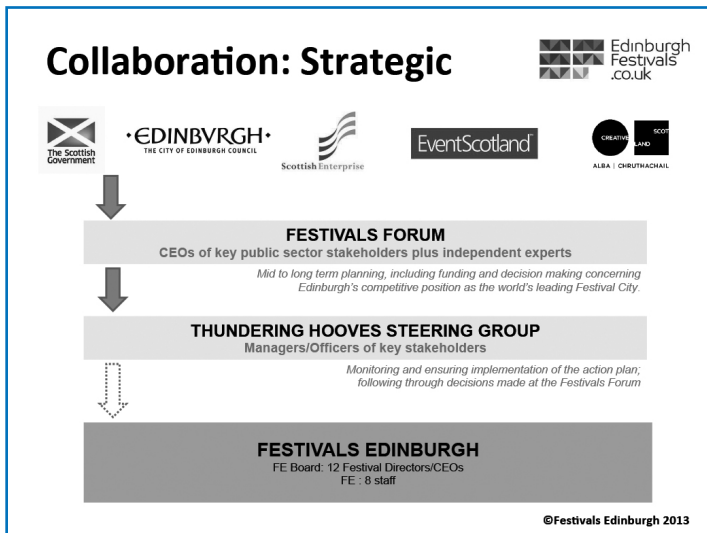
- and finally, and most importantly, the Thundering Hooves Report.

The Thundering Hooves Report contained 14 recommendations, the first of which was the establishment of a Festivals Forum for Edinburgh as a high-level, strategic commission bringing together representatives of those with a stake in maintaining the global competitive advantage of all Edinburgh's Festivals. Consequently, the Festivals Forum was established by the City of Edinburgh Council, Scottish Government, the then Scottish Arts Council and Scottish Screen (now Creative Scotland), Event Scotland, VisitScotland, Scottish Enterprise and Festivals Edinburgh in March 2007. Membership of the Festivals Forum is at CEO level to enable strategic decision-making and includes representation of all the stakeholder agencies named above.

The involvement of independent members in the forum is invaluable and relates directly to the Thundering Hooves recommendation to include external members with a long term perspective on the internationally competitive economic and cultural standing of

Edinburgh and Scotland. A further grouping, the Thundering Hooves Steering Group, comprising officers from the commissioning stakeholders and representatives from Festivals Edinburgh, work together to take forward the recommendations contained within the report. A Joint Implementation Plan was developed and the Steering Group co-ordinates the delivery of this, with the appropriate organisations taking a lead on different actions.

Both the Festivals Forum and Thundering Hooves groups work to maintain Edinburgh's position as the world's leading festival city but neither has a governance role in Festivals Edinburgh. The Management Board of Festivals Edinburgh is made up of the 12 festival CEOs or Directors and its operation is currently funded through both subscriptions from its members and significant public sector support. Each Festivals Edinburgh work strand is directed and supported by collaborative working groups comprising staff members from the Festivals themselves. This overall structure can be seen as follows:



Each of the working groups can point to clear successes, examples of which include:

- **Programmers:** Working with the Scottish Government to create and develop the Edinburgh Festivals Expo Fund as an investment vehicle for the creative ambitions of individual festivals and development of innovative partnership approach to cultural dialogue opportunities with the British Council, Creative Scotland, EventScotland and key international cultural agencies and governments
- **Marketing:** Creation of joint festivals brand, website and database, together with joint multi-channel promotional campaigns
- **Environment:** Launch of the Green Venue Initiative (GVI) working with Festival venues to monitor, manage and reduce environmental impacts
- **Innovation:** Adoption of Open Data approach to programme listings and creation of an Application Programming Interface [API] to aid media use of listings

Membership Criteria for Festivals

- Exists for a charitable purpose
- Accepts membership fees [sliding scale]
- Promotes a programme of events that is:
 - open to the general public
 - takes place predominantly within Edinburgh
 - for the most part concentrated within a period of not more than 1 month, not less than 3 days
 - is delivered either annually or biennially
- Successful record of at least three years standing
- Has governance and infrastructure in place
- Commit to working to deliver the joint principles
- World class in its quality and delivery
- Position of established leadership
- High degree of distinctiveness and pre-eminence
- Positive contribution to the current mix

● Edinburgh's Festivals – The Impacts

Edinburgh's Festivals make an enormous contribution to Edinburgh's reputation as one of the most attractive and inspiring cities in the world. From their beginnings in 1947 the Festivals have been instrumental in transforming Edinburgh into a cosmopolitan, outward-looking and welcoming city. Edinburgh's Festivals make a major contribution to the quality of life of the people of the city region and of Scotland as a whole. They invest in the growth and development of individuals and communities, through the rich, diverse and highly accessible nature of the work they present. Through their active commitment to participation, they extend the impacts of their programmes with important education and community initiatives.

International festival directors, programmers, cultural planners and strategists are all drawn by the Festivals' astonishing wealth of culture. Edinburgh's Festivals offer highly prized platforms and showcases for performing companies and artists, thinkers and scientists from around the world. With so many promoters, producers and festival directors congregating in the city every year, the Festivals offer unique opportunities for work to be seen, ideas to be exchanged, and business to be done.

Edinburgh's Festivals are a distinctive feature of Scotland's tourism offer, essential to defining it as a dynamic year-round destination for residents; an exciting, cultural magnet for visitors; a rich, creative working environment for businesses and their employees and a lively and vibrant atmosphere in which students can study and socialise. They offer remarkable and unrivalled international platforms and springboards for artists and companies, represent major attractions and influence for those choosing to live, work, visit and invest in Edinburgh and Scotland.

A ground-breaking study, commissioned from BOP Consulting and released in May 2011, embraced the ambitious challenge of understanding and benchmarking the impacts of Edinburgh's Festivals beyond the purely financial. Adopting a '360 degree' approach to quantifying cultural, social and environmental effects, the study set new standards of best practice in the international events sector. The scale and depth of the study, comprising 15,000 survey responses, reaffirmed Edinburgh's position as the world's leading festival city and created a model which now allows the Festivals to undertake further research on an annual basis.

Cultural Impacts

- 88% of performers agreed that attending the Festivals offered them the opportunity to see international work that they wouldn't have seen otherwise
- 79% of performers agreed that the Festivals offered them the opportunity to meet other practitioners
- 90% of audiences agreed that the festivals were 'must see' events
- 92% of audiences agreed that the Festivals had given them the opportunity to access work that they are not otherwise able to
- 80% of audiences agreed that the festivals gave them an opportunity to discover new talent, styles or genres
- 64% of audiences agreed that they are more likely to take greater risks in their cultural choices as a result of their Festival-going

Economic Impacts

- Attract audiences of four million, over 25,000 artists and 2000 accredited media

- 82% of visitors from outside Edinburgh and 77% of visitors from outside Scotland said the Festivals made them more likely to visit Edinburgh again in the future

- Generate £261 million of economic impact for Scotland and 5242 full time jobs in Edinburgh

- 93% of rooms across the city during the month of August are occupied, with £41 million spent on accommodation and £37 million in cafés and bars

Social Impacts

- 89% of local audiences agreed that the Festivals increase their pride in Edinburgh as a city

- 89% of audiences agreed that the Festivals promoted an outward looking, positive Scottish national identity

- 75% of audiences agreed that the Festivals had given them the opportunity to spend more time together as a family

- 69% of teachers felt that the Festivals made a difference to the children’s creativity

- 65% of parents agreed that the Festivals had improved their children’s well being

● **Lessons Learned**

The success of Festivals Edinburgh and the collective Edinburgh Festivals is that it is a living partnership and collaboration – constantly learning, constantly evolving, constantly challenging.

The Festivals had long worked together in different ways, but the publication of the Thundering Hooves Report in 2006 was the catalyst for creating the necessary partnerships and structures to deliver a shared ambition. That shared ambition – to support Edinburgh’s Festivals in sustaining and developing their position as the world’s leading festival city – and the specific recommendations within Thundering Hooves, have provided the template for action over the last 8 years.

This template provided:

- Clarity of Purpose
- Common Agenda
- Agreed Principles
- Shared ownership

But ambitions, partnerships and structures mean nothing without having the right people in the right place at the right time. And the development of Festivals Edinburgh and the other governance structures have benefited hugely from the having individuals in key positions with the right attitude, abilities and authority to drive action and deliver success.

KEN has been watching films at the Filmhouse since the 1980s and attending the festival since the 90s. He ran Intermedia Film and Video in Nottingham before becoming the founding CEO of the English regional screen agency, EM Media, in 2001, and was then Chief Executive of Scottish Screen from 2005 to 2010. He joined the Centre for the Moving Image, the parent company of the Edinburgh International Film Festival, as Interim CEO in September 2011.

Business Models: Film Industry Between New Legislations and New Technologies

Combating Intellectual Property Theft: a U.S. Law Enforcement Priority

Erik Barnett

Intellectual property rights (IPR) protection drives innovation, protects artists and creators, and allows for economic development. But criminal networks have realized that huge profit can be made stealing the IPR of others. Consider that a pharmaceutical company may spend over one billion U.S. dollars to develop the next "miracle drug," only to see counterfeits of the medication appear on the open market the year after its release. A film studio may invest hundreds of millions of dollars in a single film only to find pirated copies of the movie available for free on the internet, even prior to official release in some theaters.

A movie theater owner may take on hundreds or even thousands of employees, but might discover that while the theater is displaying the latest major Hollywood film on "the big screen," it is also available unlawfully on the internet or even as an illegal DVD at a boot sale market. It is beyond dispute that global intellectual property theft results in billions in lost revenue, taxes, and employee benefits. Innovation, consumer safety, and economic growth are sacrificed in the name of criminal profit.

What is sometimes missing in the discussions is that film piracy is not about whether the CEO of a Hollywood movie studio or Angelina Jolie earns another million dollars. Rather, the "downstream revenue" from movies funds health care insurance and retirement pensions of the person who holds the microphone during filming or moves the camera on the movie set. When a DVD isn't purchased legally, because an illegal copy is instead sold on the sidewalk, the pension isn't funded and the health insurance premium isn't paid.

On the local economy, the display of movies in a theater can employ hundreds of individuals, including the young man or woman taking tickets at the door or making popcorn for the moviegoer. When someone watches that same film illegally distributed online for free, tickets aren't sold, popcorn isn't purchased and jobs aren't created. Worse, as criminal organizations

realize the profits to be made, they don't pay taxes that would otherwise be paid on legitimate goods. They don't invest in the next big idea in technology or fund the creativity of artists. Criminals merely wait to illegally copy and reproduce someone else's innovation.

In part because of these impacts and for other reasons, the U.S. national legislature has made criminal certain copyright infringement and trademark violations. Homeland Security Investigations is part of U.S. Immigration and Customs Enforcement (ICE), the second largest federal law enforcement agency in the United States. HSI, as it is known by its initials, investigates intellectual property theft occurring in the United States. HSI also manages the National Intellectual Property Rights Coordination Center, commonly known as the IPR Center. The IPR Center, led by ICE's Homeland Security Investigations (HSI), brings together 17 U.S. agencies, along with Europol, Interpol, and the governments of Mexico and Canada to tackle all forms of IPR theft.

Through our criminal investigations, we recognize that IPR is truly a transnational crime. In a recent film piracy case, the movies were recorded in U.S. theaters using video cameras, linked with audio recorded in different languages from movie theaters around the world, uploaded to servers in central Europe and distributed to a global audience. No one country's law enforcement agency can tackle every link in that criminal organization. Therefore, law enforcement must engage multilaterally. Since November 2012, the U.S. IPR Center and Homeland Security Investigations have teamed with Europol on multilateral phases of Operation In Our Sites. This law enforcement initiative attacks counterfeiting and piracy on the internet.

Through Operation In Our Sites – Project Transatlantic, law enforcement from the U.S. and five European countries have joined together to disrupt 460 websites selling counterfeit or pirated goods, and seize hundreds of thousands of dollars in criminal proceeds.

Operation In Our Sites was initiated in 2010 in the U.S. by the IPR Center and HSI and has so far disrupted over 2,000 websites, seized over \$3 million in criminal profits and arrested 15 individuals, many of whom are still serving prison sentences.

Aggressive intellectual property enforcement on the internet has been alternately praised by victim rights holders, criticized by some, and watched with curiosity by many. However, governments exist, in great part, to protect private property from theft. The private property of business is often its intellectual property. Intellectual property enforcement must be a priority for the police agencies within government. One reason for the success of enforcement actions like Operation In Our Sites is the IPR Center's efforts to foster partnerships with the private sector. We recognize that law enforcement cannot fight IP theft alone.

To facilitate productive partnerships, the IPR Center supplies both industry and law enforcement with valuable information about our efforts to combat the importation of hazardous and counterfeit products. And we rely on industry to participate in the education and outreach that must be conducted to change the attitudes toward piracy of movies or counterfeiting of goods. In 2011, the IPR Center developed an anti-piracy warning. The anti-piracy warning is a collaborative effort between Homeland Security Investigations and the Federal Bureau of Investigation to raise public awareness of the criminality of media piracy and economic impact of theft of intellectual property.

The anti-piracy warning is designed to deliver a strong message from U.S. law enforcement that commercial digital piracy is a criminal act that will be investigated and prosecuted by the two largest federal law enforcement agencies.

The warning is currently displayed on DVDs and Blu-Rays produced by the seven largest movie studios in the United States, including all six studio members of the Motion Picture Association of America. The National Alliance of Theater Owners currently uses portions of the anti-piracy warning in a public awareness campaign displayed in movie theaters across North America. The warning also directs the public to the IPR Center website, through which individuals or companies may report infringement of intellectual property rights to the law enforcement partners at the IPR Center. Since the introduction of the new anti-piracy warning, the number of substantive reports to the IPR Center increased over 450 percent. The warning leads to increased investigation of IPR theft.

The Basis for the Bosnian Model of Ipr Protection On Line.

Antonio Beus

The digital age raises new challenges in the exploitation and distribution of audiovisual works. The question that arises is how to meet these challenges within the existing legislative framework, i.e. how to adapt and enable existing tested distribution mechanisms and how to adequately protect content.

The advent of the digital age is roughly characterized by: cheap production and global distribution. This begs the question: How can globally distributed film be adequately exploited and protected on the market using local laws?

One of the main characteristics of the digital age is that marketing has gone global, which has shortened the timeframe for the distribution and exploitation of the product.

From the time of the Lumière brothers to the advent of the Internet, very little had changed in essence. The classic film distribution model was: Movie theatre-rental-retail-CATV-TV. However, with the mass use of the Internet and the digitalization of production, the only factors that have remained the same are: film as the product and the viewer as the consumer.

For the author or producer, digitalization brought with it cheap production, while for the distributor it meant cheaper marketing, as well as the challenge of exploiting film as much as possible on the global market, in as little time as possible.

As a social being, the viewer is essentially a law-abider but she/he wants to watch the film when it is current and if this is not possible legally, she/he will seek alternatives, turning to easily available illegal sources because, as a result of successful marketing, the viewer wishes to be "IN".

From a legal standpoint, digital film does not accept too many rules, and regulation in the digital age has to be very much simplified: you do or do not have the right to exploit a film, it's a Yes/NO or in binary terms 0/1

The author or producer gives the right for using/distributing content for a particular territory/media.

Today, both legal and illegal (pirated) film can be found at the same place: the Internet. In technical terms, it is relatively easy to disable illegal distribution on the Internet. Namely, all content on the net is located in a named place i.e. has a web address.

The question remains: How can protection be enforced in a quick and efficient manner, while respecting two fundamental democratic principles?

- Unconditional freedom of access to information on the Internet as a basic human right.
- Private property is inalienable and the author/right holder must be adequately compensated for his/her work.

Freedom of access to the Internet does not include exploiting and sharing other's property without adequate compensation or the consent of the owner.

The Bosnian model is a defined protocol of measures that enable the author/right holder to protect an audiovisual work on the local or global levels with the assistance of local IP providers. All necessary work on the protection of audiovisual works is carried out by "APAW BIH" in the name of the author/right holder and according to authorization by the author/right holder.

The Role of New Technologies in the Definition of the Cultural Exception Within the Framework of International Trade Negotiations

Roberto Olla

The term “Cultural Exception” and “Cultural Exclusion” have reemerged recently following the launch of the negotiations on the liberalization of trade between the US and the EU. The Transatlantic Trade and Investment Partnership (TTIP) is a proposed free trade area between the United States and the European Union. It represents potentially the largest regional free-trade agreement, covering more than 40% of world GDP and accounting for large shares of world trade and foreign direct investment. Potentially beneficial for the economies of both sides of the Atlantic, it was calculated that in case of a fully realized agreement until 2015, Europe could expect some 400,000 new jobs, an average financial relief of 545 Euro for each household every year, as well as annual gains of \$160 billion for the EU and \$128 billion for the US.

Indeed, in the light of the current economic crisis in Europe, TIPP sounds like a very good idea. However, the debate has become particularly harsh between the EU on the one side, and some of the Member States, on the other, when the European Commission decided to include the cultural industries within its mandate of negotiations with its American counter-part. If the American authorities seemed to keep a low profile on this subject-matter, limiting their discourse to the need of reducing any kind of exclusions from the trade talks, Europeans disagreed between themselves on basically everything.

Some of the European countries led by France opposed the inclusion of culture in the trade talks; other countries were aligned with the European Commission and considered that no sector should have been excluded before the official beginnings of the negotiations. According to the latter, the exclusion of one sector (like culture) would have weakened the historical importance and the economic impact of this new free trade agreement.

For France and other fellow countries, culture must be excluded from the liberalization talks in order to allow each Member State of the European Union the complete freedom to promote (if it so wishes) its own cultural industries. Not only the exclusion should allow

each Country to maintain the status quo (ie the current legal, administrative and financial measures aimed at supporting its national industry) but also allow any Member State of the Union to adopt any new measure it considers necessary in the light of future technological developments.

This was precisely the core of the problem. The European Commission, backed by some more conservative Members States of the European Union, wished to include culture in the trade talks and proposed to protect the national film industries by negotiating a “stand still” clause, which would have allowed preserving the current aid systems (both regulatory and financial) but would have excluded any new future measures in this field. In other terms, the compromise conceived by the European Commission consisted in preserving the national film industries by allowing a sort of limited cultural exception to the main provisions of the TTIP, which would have allowed Europeans to maintain their existing support measures.

France opposed this rather limited vision of the future of the film industry in Europe and threatened to veto the beginning of the trade talks in the Council of Ministers of the European Union. According to France, only the complete exclusion of culture from the negotiations could have allowed Europeans to maintain the freedom of choosing how to protect the future of the European film industry. New technologies have always had a great impact on the film industry and, according to France, Governments must maintain the highest degree of freedom in order to regulate at best this sector in constant technological change.

Trade talks are currently taking place between the two sides of the Atlantic ocean. The European Commission, which represents the European Union for the purposes of the TTIP, cannot engage any commitment to liberalize the film sector since culture has been excluded from the trade talks. This means that Europeans are and remain free to adopt any new measures they consider necessary to support any new forms of audio-visual content in the future. Also those new forms, which still have not been invented yet.

ROBERTO OLLA was trained as a lawyer, specialising in entertainment law (PhD) and film production. He began his career as a researcher in media law at the European University Institute in Florence before moving to Brussels where he joined the distribution department of the MEDIA Programme. A few years later, he was appointed as legal advisor on audio-visual matters by the European Commission. In 2002 Roberto relocated to Strasbourg where he worked as a project manager dealing with feature films for the Eurimages co-production fund. He was named Executive Director of the Fund in 2008.

Film Industry Between New Legislations and New Technologies

Elisabeth O. Sjaastad

These days being on the side of “disruptive” technologies makes a politician the king of cool. This is nothing new, of course. In 1927 the historian Charles A. Beard noted in “Time, Technology, and the Creative Spirit in Political Science”:

“Technology marches in seven-league boots from one ruthless, revolutionary conquest to another, tearing down old factories and industries, flinging up new processes with terrifying rapidity.”

While every politician and policymaker is speaking about the ever elusive “new business models” that will save the day, we in the audiovisual sector have patiently explained just how interdependent all players in our value chain are, and that the (pre-) financing and distribution of films are inseparably linked. Our current business model is not so easily replaced. This makes the transition into the digital age all the more complex and challenging.

But even if we’d rather do business as usual, there is no denying that the world around us has changed. The virtual is a reality.

And our audience is famously wanting to access everything, everywhere, anytime – for free or a very low price, with little regard, it seems, for the long term cost or consequence for those who make or distribute the content they so desire.

Under the current system it often seems that the further down the value chain, the less risk you take and the more money you (potentially) make.

Today the economic rewards for the jobs and growth that our creative work generates are not fed back to the creators and risk-takers of the value chain.

When the creator bakes a cake, he or she only gets to keep a thin slice. A discussion paper published in 2004 by the economist William Nordhaus tried to establish exactly how thin that slice is. Nordhaus reckons that innovators capture a minuscule 2.2 % of the total social benefit of their innovations.

Tech giants and telecoms are currently engaged in patent wars and slug it out in sealed courtrooms, but they do stand shoulder to shoulder in the very public attack on copyright, the go-to excuse being that it’s an “obstacle” to the single market.

They fight tooth and nail not to pay creators their fair share in the form of licensing fees or private copy levies. All the while their growth is on the back of those “content” creators. If we were still using mobiles just to talk or send text messages, who would need a smartphone?

FERA believes in the principle that all media or platforms, offline and online, that benefit from audiovisual works should contribute to the funding and distribution costs of new production. This is recognised in the EU Audiovisual Media Services (AVMS) Directive. The artistic merit, technical quality and diversity of the films and television programmes we make in Europe are the pre-conditional criteria for economic growth, and any new legislation must have the aim of encouraging and sustaining a healthy European audiovisual sector that will in turn continue to guarantee Europe’s cultural diversity.

The presence and visibility of European works on all online platforms is an essential part of the AVMS Directive, Especially publicly funded online catalogues and services must be required to include a significant proportion of European works, and present them prominently. In a converged world of access to an ever larger array of audiovisual works, it is essential that ‘discoverability’ of European works is guaranteed.

FERA strongly believes, as provided for in article 13 of the AVMS directive, that financial contributions from online services should consist in the obligation to invest a share of the turnover of the service concerned in the production and rights acquisition of European works (the investment rate could increase according to the turnover) and/or by contributing to national film and audiovisual production funds.

A successful example of this is the French Community in Belgium. Online operators were given the choice of either contributing 2.5% of their turnover to the film fund, or spend the equivalent on commissioning projects of their own choice. All the players chose to engage in finding projects to invest in on their own, and the effort and resources they then spent on promoting the finished films, in which they now had a financial stake, was much greater than when they were simply fulfilling a minimum catalogue quota.

Apart from the Belgian example, the implementation of article 13 so far has been insufficient. As a result of this lack of decisive regulatory action, there are today disputes and court cases across Europe, where ISPs and technology companies fight public film funding bodies in court to avoid having to make a financial contribution.

What is really at stake is more than the current legislation on investment in and promotion of independent European works, but also how the audiovisual sector can be equipped to straddle the transition to the digital economy and an online market place which today is completely dominated by American giants such as Google, Amazon, Apple iTunes.

At a time when Google has 95% market share in many European countries and face investigation on both sides of the Atlantic on the possible abuse of dominant position, in the context of the EU-US trade talks the European Commission seemed more than willing to hand over the remaining 5 %, by insisting that audiovisual services be part of the negotiations mandate. Luckily, we succeeded in having this topic excluded.

A new wave of American services such as Netflix and HBO are sweeping across Europe. From what I understand they operate under an editorial policy of 80 – 10 – 10: 80% American content, 10 % local (national) and 10% regional (European).

These services would presumably not want to comply with AVMS Directive article 13 on the contribution of online services to the production and promotion of European audiovisual works.

Cinema release 'windows' will inevitably change as online use generates more economic value, though it is important to recognize the superior importance of offline partners to the return of investment. VoD's current turnover is currently very small, and it would be unfair to allow the new audiovisual media services to profit from European audiovisual works without investing a fair share of their turnover in the production and promotion of new works. Some have started to do so, but it would seem early to call this a trend. It is however already clear that the revenues generated by online platforms for each single title is only ever going to be a fraction of what the same revenues have traditionally been for DVD releases. This is a dramatic loss of value that will greatly affect each film's ability to secure initial funding to get made, and to be profitable.

At a time when the European Commission, in particular, seems to be challenging our sector on many fundamental issues such as state aid rules, the EU - US talks, and most recently the public consultation on a possible revision of the AVMS Directive, we must all try to protect the thin red line between the cultural exception and the onslaught of dogmatic market liberalism.

ELISABETH O. SJAASTAD (born in Oslo, Norway 1977) studied directing at the Beijing Film Academy and the Central Academy of Drama (1998-2000). From 2000 – 2002 Elisabeth worked as Promotion Manager at Virgin Records/EMI being responsible for the promotion of some of Norway's most successful artists such as Sondre Lerche, Anja Garbarek, Madrugada, Kings of Convenience and Røyksopp, and international artists such as Janet Jackson, Lenny Kravitz, The Smashing Pumpkins, Daft Punk, Air, Placebo, Mick Jagger. In 2002 she directed and produced the Amanda-nominated (Norway's national film award) feature documentary *Shiny Stars, Rusty Red* (China) which was invited to film festivals worldwide, including Full Frame Documentary Festival, USA, and Pusan International Film Festival, Korea. Through her production company Screen Stories she has also produced films from South Africa (also as director), Peru and the United Arab Emirates. Elisabeth has been Vice President of the Norwegian Film Makers' Association and a FERA delegate since 2005. She has served on several juries and boards. In 2006 she was appointed by the Norwegian Ministry of Culture as member of the Einarsson-committee, which produced a report on Norway's audiovisual policy and made recommendations to restructure the Norwegian Film Institute and redefining the goals and ambitions of Norwegian film.

Production, Distribution and Exhibition In Southeast Europe

A Market Overview

● Financing and coproduction

Recent buzz titles from Southeast Europe are now almost by a norm, multilateral European co-productions involving diverse financing sources.

The reasons for this are twofold; firstly these are mainly author driven, internationally orientated productions who choose co-production as a sort of a guarantee of a better circulation potential and more crucially, level and availability of film financing is still very low in their home markets.

From our experience in working with these and other projects passing through the CineLink pipeline, we can observe that the respective national public funds available to the films lead producer can rarely provide more than 30% of the budget, if not less in many cases. Also, on the lead producers financing plan we would find MEDIA development support in case the producer is situated in the MEDIA member country, limited public TV support, either as an MG against Free TV distribution rights or in a form of national co-production, in some territories such as Romania, Pay TV is rather strong and HBO Romania invests regularly in Romanian films for instance, while MGs from national theatrical distributors are almost negligible across the region, even in a huge territory such as Turkey.

Such an environment normally allows the space necessary for involvement from more than just one minority co-producer when structuring an international co-production, but we can roughly indicate three patterns in that respect:

- a multilateral co-production involving two or more territories from the region and one or two European territories, or

- a bilateral co-production between a bigger territory in Southeast Europe, such as Turkey, Romania or Hungary and one of the major European territories, or
- a co-production between two or more territories from the region only.

The latter category has proliferated over the past 5 years.

Minority coproduction partners for films from Southeast Europe most commonly come from Germany securing investments from different German regional funds, most notably Medienboard Berlin Brandenburg, Mittle Deutche Medienfonderung or Filmstiftung Nordrhein-Westfalen as well as ZDF/ARTE. France is also a common partner, with the CNC's Cinema du Mond fund, as well as ARTE France, while UK producers' involvement was significantly reduced since the sale and leaseback schemes' demise in 2007.

Italy also often partners with the region, most notably with Albania and Romania, while Spain remains a sporadic partner. Sweden, especially regional funds like Film I Vast represent important partners, as well as the Netherlands and Ireland.

Due to the Southeast European co-productions financing structure, Eurimages represents an extremely important, if not an only source of supranational funding available to Southeast European co-productions, however only about 30% of all co-productions made in the region actually obtain Eurimages' support in the end. This is understandable given the ever-growing competition for the funds very limited resources, which amount to approximately 24 million Euros per year, but also indicates a clear need for an additional supranational public funding source in Southeast Europe.

It is now evident that over the past decade, the film related public bodies, as well as film professionals in the region, have definitely embraced international co-production as a key financing model in general and a primary financing model for internationally oriented arthouse films. In 2012 25% of the total films produced in the 15 Southeast European territories and Georgia, were made as official international co-productions, while almost 50% of those included at least two countries from the region in their co-production structure. Moreover, 90% of films released in more than 1 territory other than their home territory, were co-productions.

Behind these facts lays a common strategy of developing a sophisticated network of development programs and co-production platforms in order to raise the quality and boost the production capabilities and chances for circulation of films from the region through extensive development and co-production with each other, the rest of Europe and the world. The film festivals in the region like Istanbul, Sarajevo, Thessaloniki and Sofia, played a big role in this with their respective co-production platforms, Meetings under the Bridge, CineLink, Crossroads and Sofia Meetings.

● Supply chain

On the other hand, what is comparatively working in development and in production, doesn't entirely translate into the rest of the film value chain. Distribution and exhibition sectors are still extremely fragmented and the potential of Southeast Europe as a market for films from the region and other European films is not nearly as exploited as it could be.

Main obstacles for this are similar to those faced by the EU and tackled by a series of its MEDIA programmes over the years in an attempt to increase the market share of European film in Europe. In fact, from the perspective of the film industry in Southeast Europe today, the consequences and duration of the aforementioned efforts defined 6 different groups of countries within the region:

- Former EU 15 countries: Austria and Greece
- EU 27 countries: Slovenia, Hungary, Romania and Bulgaria
- Turkey
- Former Yugoslavia (without Slovenia): Croatia, Bosnia and Herzegovina, Macedonia, Montenegro, Serbia and Kosovo (Western Balkans)
- Albania (also Western Balkans)
- The Caucasus

Cultural differences, language barriers, under-capitalized companies in the sector, incapability for multi-territorial distribution, only to name the ones in common with the rest of Europe in addition to poorer infrastructure and high costs of entry for new multiplexes,

exhibitors and distributors low spending on promotion & advertising, widespread piracy and to some degree demographics, as younger audiences (now 16-24) grew up in a very non-cinema-going and not-paying-for-culture environment due to either war, economic and cultural sanctions, lack of cultural policies and overall transition all make the job in Southeast Europe even more difficult.

● Theatrical

As the economic crisis lengthens, mature theatrical markets in the former EU15 countries Austria and Greece have shown decreases in box office earnings and the same goes for some of the EU 27 countries, namely Bulgaria and Slovenia. However, box office earnings have been significantly increasing in the developing markets in the Western Balkans, Romania and Turkey.

Similar trend is visible in the admissions cycle, where the more developed markets experience contractions while the developing ones experience growth, however looking at the number of admissions per inhabitant ratio, all countries in the region, with the exception of Austria, are well below the EU average of 1.85 admissions per year, per inhabitant.

Market share of national films and other European film is relatively low across the region and the box office has been ruled by the mainstream studio product for a long time, with the exception of Turkey where national films market share is around 50% and European films hold lower single digits percentages, while the rest belongs to Hollywood.

Number of inhabitants per screen shows the region is largely under-screened with only a handful of countries around the EU average while the others fair far behind it. Digitization trend has finally shifted from the one or two 3D screens per site doctrine, towards making the existing multiscreen sites fully digital, which is why almost all of the countries experienced significant growth in this area, Turkey being the only exception.

● Home video

Traditional Home video market is almost inexistent across the region due to widespread piracy, with few exceptions like Austria or Greece, yet VOD market is on the rise and most of the countries have experienced a serious growth in number of operational VOD platform along with experiencing constant increase in number of broadband users.

COPRODUCTION TABLE

OFFICIAL COPRODUCTIONS ORIGINATED IN AT LEAST ONE OF THE COUNTRIES OF THE SEE →

# TITLE	AL	AT	BA	BG	HR	CY	GE	GR	HU	KS	MK	ME
PHARMAKON	M								X			
AGON (DAWN)	M							X				
AMOUR		X										
THE WALL		M										
PARADISE-TRILOGY		M										
CHILDREN OF SARAJEVO			M									
HALIMA'S PATH			X		M							
THE BOY WHO WAS A KING				M								
FATHER				M	X							
SPAIN		M		X								
THE STATE OF SHOK			X	X								
BALKAN MELODIE				X								
SOFIA'S LAST AMBULANCE				X	M							
TZVETANKA				X								
NIGHT BOATS					M							
ZAGREB STORIES VOL.2					M							
HIVES					M							
PRACTICAL GUIDE TO BELGRADE					X				X			
GOLTZIUS AND THE PELICAN COMPANY					X							
WHEN THE DAY BREAKS					X							
KEEP SMILING							M					
CHAIKA							X					
JACE								M			X	
UNFAIR WORLD								M				
GOD LOVES CHAVIAR								M				
FISH N' CHIPS						M		X				
THE WOMEN WHO BRUSHED OFF HER TEARS											M	
THE THIRD HALF											M	
SKOPJE REMIX											M	
DR RAY AND HIS DEVILS												X
LOVELESS ZORITSA						X		X				
RUSTY STEEL												
PUZZLE FOR A BLIND MAN												
IPU - CONVICTED TO LIVE												
ALL GOD'S CHILDREN												X
ADALBERT'S DREAM												
EVERYBODY IN OUR FAMILY												
BEYOND THE HILLS												
OF MEN AND SNAILS												
DIAZ: DON'T CLEAN UP THIS BLOOD												
AGLAJA									M			
ICE												
REDEMPTION STREET												
EASTALGIA												
MY BEAUTIFUL COUNTRY					X							
THE PRIEST'S CHILDREN					M							
NIGHT TOO YOUNG												
SOMEWHERE IN BETWEEN												
WATCHTOWER												
VOICE OF MY FATHER												
CODE NAME: VENUS						X						
BEYOND THE HILL								X				

* Sources: National Film Centers

Croatian Audiovisual Centre

Macedonian Film Fund

Ministry of Culture of Montenegro

Film Centre Serbia; Assembly of the City of Belgrade, Secretariat

for Culture; Secretariat for Culture Autonomous Province of

Vojvodina

Slovenian Film Centre

Kosovo Cinematography Centre

Austrian Film Institute, Fernsehfonds, ORF/Film/Fernseh-

Abkommen, Filmfonds Wie

Romanian National Film Center, CNC Romania

Republic of Turkey Ministry of Culture and Tourism

← OFFICIAL COPRODUCTIONS ORIGINATED IN AT LEAST ONE OF THE COUNTRIES OF THE SEE

RO	RS	SI	TR	BE	CZ	DE	ES	FI	FR	GB	IL	IT	LU	NL	PL	RU	SE	UA	US
X									X										
						X			M										
						X			X										
			X			X			X										
		X																	
						X													
						X													
X	M																		
					M	X													
						X													
						X											M		
X	X																		
	X																		
M					X	X			X	X									
M						X			X	X				M					
							X		X				X						
			X				M		X										
						X													
																	X		
		X		X		X													
					X														
X	M																		
M	M																		X
M																			X
M				X		X													
M														X					
M														X					
M				X					X										
M									X										
X									X			M							
X																			
	M																X		
	M	X																	
	X					M												X	
	X					M													
	X																		
		X			M														
			M			X			X										
			M						X										
			M			X			X										
			M							X				X					
			M																

The Greek Film Centre
 Georgian National Film Centre
 Hungarian National Film Fund (MNFA), Foundation
 of the Hungarian Historical Motion

Ministry of Education and Culture of Cyprus /
 Cinema Section, Media Desk Cyprus
 Albanian National center of Cinematography
 (ANCC)

M - MAJORITY X - MINORITY

OVERVIEW - NUMBER OF FILMS PRODUCED / AVERAGE BUDGET / PUBLIC FUNDING AVAILABLE

Country	2008	2010	2012
ALBANIA			
Number of films produced	5	3	7
Average budget €	700,000	700,000	800,000
Public funding available €	1,000,000	622,000	600,000
AUSTRIA			
Number of films produced	15	45	52
Average budget €	2,000,000	2,500,000	1,790,000
Public funding available €	40,000,000	37,050,000	47,260,709
BULGARIA			
Number of films produced	9	22	36
Average budget €	900,000	800,000	971,521
Public funding available €	8,300,000	4,160,000	6,186,631
BOSNIA AND HERZEGOVINA			
Number of films produced	7	5	2
Average budget €	1,200,000	1,500,000	1,300,000
Public funding available €	1,500,000	1,250,000	1,200,000
CROATIA			
Number of films produced	11	11	32
Average budget €	900,000	900,000	1,000,000
Public funding available €	4,880,000	5,900,000	6,800,000
CYPRUS			
Number of films produced	n/a	2	4
Average budget €	n/a	800,000	n/a
Public funding available €	n/a	1,500,000	1,000,000
GEORGIA			
Number of films produced	n/a	n/a	17
Average budget €	n/a	n/a	400,000
Public funding available €	n/a	n/a	2,000,000
GREECE			
Number of films produced	23	26	44
Average budget €	600,000	450,000	450,000
Public funding available €	9,000,000	n/a	2,000,000
HUNGARY			
Number of films produced	24	36	27
Average budget €	1,100,000	1,300,000	n/a
Public funding available €	11,900,000	7,500,000	n/a
KOSOVO			
Number of films produced	0	2	5
Average budget €	250,000	200,000	n/a
Public funding available €	400,000	450,000	n/a
MACEDONIA			
Number of films produced	1	7	4
Average budget €	1,200,000	1,200,000	n/a
Public funding available €	2,500,000	1,788,600	3,600,000



OVERVIEW - NUMBER OF FILMS PRODUCED / AVERAGE BUDGET / PUBLIC FUNDING AVAILABLE

Country	2008	2010	2012
MONTENEGRO			
Number of films produced	1	5	8
Average budget €	500,000	350,000	n/a
Public funding available €	800,000	450,000	n/a
ROMANIA			
Number of films produced	18	19	26
Average budget €	800,000	800,000	n/a
Public funding available €	15,700,000	20,000,000	19,000,000
SERBIA			
Number of films produced	30	24	27
Average budget €	500,000	700,000	700,000
Public funding available €	2,500,000	3,500,000	3,000,000
SLOVENIA			
Number of films produced	9	7	8
Average budget €	1,000,000	1,100,000	709,245
Public funding available €	5,200,000	7,233,363	4,758,842
TURKEY			
Number of films produced	70	66	61
Average budget €	600,000	600,000	n/a
Public funding available €	5,000,000	2,700,000	8,500,000

*sources: National Film Centers, OBS, various sources

* including feature documentaries

FEATURE FILMS PRODUCED 2008 - 2012

	Country	2008	2009	2010	2011	2012	2012 / 2011
WB	ALBANIA	3	4	3	10	7	↓ -30.00%
EU 15	AUSTRIA	40	34	45	59	52	↓ -11.86%
WB	BOSNIA AND HERZEGOVINA	7	6	5	9	2	↓ -77.78%
EU 27	BULGARIA	9	19	22	21	36	↑ 71.43%
WB	CROATIA	11	13	11	19	32	↑ 68.42%
EU 27	CYPRUS	1	3	2	4	n/a	→ 0.00%
GE	GEORGIA	n/a	n/a	n/a	n/a	12	→ 0.00%
EU 15	GREECE	30	25	18	28	44	↑ 57.14%
EU 27	HUNGARY*	30	27	36	44	27	↓ -38.64%
WB	KOSOVO*	0	2	3	3	4	↑ 33.33%
WB	MACEDONIA	1	9	7	7	4	↓ -42.86%
WB	MONTENEGRO	1	1	5	6	8	↑ 33.33%
EU 27	ROMANIA	9	18	21	27	26	↓ -3.70%
WB	SERBIA	30	25	24	26	27	↑ 3.85%
EU 27	SLOVENIA	9	6	7	16	8	↓ -50.00%
TR	TURKEY	51	69	66	74	61	↓ -17.57%

KS* no data for 2011, for comparison 2010 was taken
HU* including feature documentaries

*sources: National Film Centers, OBS, various sources

COMMULATIVE BOX OFFICE IN EURO 2008 - 2012

		2008	2009	2010	2011	2012	2011 / 2012
WB	AL	n/a	n/a	n/a	n/a	n/a	→ 0.0%
EU 15	AT	103,400,000	181,600,000	115,538,776	136,444,000	124,323,885	↓ -8.9%
WB	BA	460,000	1,114,942	1,790,741	1,309,000	2,023,280	↑ 54.6%
EU 27	BG	6,175,000	11,946,444	17,322,310	20,097,000	17,191,832	↓ -14.5%
WB	HR	10,538,146	11,688,116	11,252,080	14,168,000	14,832,771	↑ 4.7%
EU 27	CY	n/a	n/a	n/a	7,623,000	n/a	→ 0.0%
GE	GE*	n/a	n/a	n/a	n/a	2,400,000	→ 0.0%
EU 15	GR	88,500,000	101,250,000	93,201,193	99,715,000	79,818,200	↓ -20.0%
EU 27	HU	47,300,000	45,200,000	42,956,055	41,118,000	44,198,000	↑ 7.5%
WB	KS*	67,578	86,237	66,628	66,628	120,000	↑ 80.1%
WB	MK	n/a	n/a	n/a	n/a	512,470	→ 0.0%
WB	ME*	450,000	750,000	786,557	786,557	764,811	↓ -2.8%
EU 27	RO	12,522,724	20,556,170	24,768,730	31,570,000	32,494,122	↑ 2.9%
WB	RS	3,750,000	4,284,157	3,031,804	5,537,697	7,078,765	↑ 27.8%
EU 27	SI	10,164,000	11,759,486	12,811,370	13,937,000	12,002,517	↓ -13.9%
TR	TR	161,369,265	164,815,155	188,808,490	183,799,000	165,062,001	↓ -10.2%
	EU 27				6,400,000,000	6,473,300,000	↑ 1.1%

KS* no data for 2011, for comparison 2010 was taken
 ME* no data for 2011, for comparison 2010 was taken
 GE* estimated

*sources: National Film Centers, OBS, various sources
 * including feature documentaries

CINEMA ADMISSIONS PER INHABITANT

		2008	2009	2010	2011	2012	2011 / 2012
WB	AL	n/a	n/a	n/a	n/a	n/a	→ 0.00%
EU 15	AT	1.87	2.2	2.06	1.99	1.87	↓ -5.99%
WB	BA	0.06	0.12	0.18	0.13	0.21	↑ 60.23%
EU 27	BG	0.37	0.42	0.54	0.64	0.55	↓ -14.27%
WB	HR	0.74	0.8	0.76	0.81	0.90	↑ 11.53%
EU 27	CY	1.09	1.06	1.02	1.01	1.07	↑ 5.94%
GE	GE	n/a	n/a	n/a	n/a	0.13	→ 0.00%
EU 15	GR	1.05	1.09	1.04	0.97	0.92	↓ -4.90%
EU 27	HU	1.03	1.06	1.1	0.98	1.00	↑ 2.04%
WB	KS	n/a	n/a	n/a	n/a	0.02	→ 0.00%
WB	MK	0.05	0.04	0.08	0.06	0.10	↑ 68.00%
WB	ME	n/a	n/a	n/a	0.44	0.36	↓ -18.08%
EU 27	RO	0.18	0.25	0.3	0.34	0.44	↑ 28.91%
WB	RS	n/a	n/a	n/a	0.28	0.35	↑ 25.92%
EU 27	SI	1.19	1.3	1.41	1.41	1.33	↓ -5.45%
TR	TR	0.54	0.51	0.56	0.57	0.58	↑ 1.91%
	EU 27 AVG.				1.92	1.85	↓ -3.65%

INHABITANTS PER SCREEN

		2008	2009	2010	2011	2012	2011 / 2012
WB	AL	n/a	n/a	n/a	n/a	235165	➡ 0.00%
EU 15	AT	14431	14515	14391	14633	14594	↓ -0.27%
WB	BA	99825	97600	97425	97250	38050	↓ -60.87%
EU 27	BG	80921	74154	52639	53096	45743	↓ -13.85%
WB	HR	39599	41362	37391	28283	29390	↑ 3.91%
EU 27	CY	25706	26424	27089	24629	19149	↓ -22.25%
GE	GE	n/a	n/a	n/a	n/a	490111	➡ 0.00%
EU 15	GR	22298	22610	23271	22902	21938	↓ -4.21%
EU 27	HU	24646	24015	25280	25220	23750	↓ -5.83%
WB	KS	n/a	n/a	n/a	n/a	1803000	➡ 0.00%
WB	MK	79038	114000	102800	89522	69759	↓ -22.08%
WB	ME	n/a	n/a	n/a	n/a	32633	➡ 0.00%
EU 27	RO	158078	117924	110380	88613	72135	↓ -18.60%
WB	RS	n/a	n/a	n/a	n/a	57886	➡ 0.00%
EU 27	SI	18476	19874	19341	18518	18700	↑ 0.98%
TR	TR	40178	38720	37461	35702	38215	↑ 7.04%
	EU 27 AVG.				16945	17229	↑ 1.68%

DIGITAL SCREENS AS A PERCENTAGE OF TOTAL SCREENS

		2008	2009	2010	2011	2012	2011 / 2012
WB	AL	n/a	n/a	n/a	n/a	58%	➡ 0.00%
EU 15	AT	15%	41%	52%	68%	68%	➡ 0.00%
WB	BA	0%	3%	8%	18%	57%	↑ 225.71%
EU 27	BG	18%	23%	41%	56%	78%	↑ 39.29%
WB	HR	6%	7%	8%	58%	68%	↑ 17.24%
EU 27	CY	0%	19%	48%	51%	60%	↑ 17.65%
GE	GE	n/a	n/a	n/a	n/a	78%	➡ 0.00%
EU 15	GR	2%	6%	12%	15%	24%	↑ 60.00%
EU 27	HU	2%	7%	14%	40%	75%	↑ 87.50%
WB	KS	n/a	n/a	n/a	n/a	1%	➡ 0.00%
WB	MK	n/a	n/a	n/a	n/a	90%	➡ 0.00%
WB	ME	n/a	n/a	n/a	n/a	33%	➡ 0.00%
EU 27	RO	10%	22%	31%	46%	52%	↑ 13.04%
WB	RS	n/a	n/a	n/a	n/a	20%	➡ 0.00%
EU 27	SI	8%	9%	15%	15%	16%	↑ 6.67%
TR	TR	1%	3%	10%	13%	16%	↑ 23.08%
	EU 27 AVG.				54%	74%	↑ 37.04%

VOD (Film + TV) PENETRATION TABLE

Country	VOD platforms in 2009	VOD platforms in 2010	VOD platforms in 2011	VOD platforms in 2012	2012/2011
WB ALBANIA	1	1	1	1	→ 0.00%
EU 15 AUSTRIA*	9	9	9	31	↑ 244.44%
WB BULGARIA	0	2	2	7	↑ 250.00%
EU 27 BOSNIA AND HERZEGOVINA	0	3	3	4	↑ 33.33%
WB CROATIA	1	1	2	5	↑ 150.00%
EU 27 CYPRUS	0	2	2	7	↑ 250.00%
GE GEORGIA	n/a	n/a	1	1	→ 0.00%
EU 15 GREECE*	1	1	1	7	↑ 600.00%
EU 27 HUNGARY*	5	5	5	7	↑ 40.00%
WB KOSOVO	0	0	0	0	→ 0.00%
WB MACEDONIA	0	2	1	1	→ 0.00%
WB MONTENEGRO	1	1	1	1	→ 0.00%
EU 27 ROMANIA*	n/a	3	3	9	↑ 200.00%
WB SERBIA	1	2	2	2	→ 0.00%
EU 27 SLOVENIA	3	3	4	3	↓ -25.00%
TR TURKEY*	2	2	2	8	↑ 300.00%

*www.statistik.at

*www.orkii.com

AT*, GR*, HU*, RO*, TR* no data for 2011, for comparison 2010 was taken

INTERNET PENETRATION TABLE

Country	Internet penetration rate in 2009	Internet penetration rate in 2010	Internet penetration rate in 2011	Internet penetration rate in 2012	2012/2011
ALBANIA	18.0%	43.5%	48.1%	49.0%	↑ 1.87%
AUSTRIA	68.3%	74.8%	78.7%	79.8%	↑ 1.40%
BULGARIA	32.6%	47.5%	48.8%	51.0%	↑ 4.51%
BOSNIA AND HERZEGOVINA	31.4%	31.2%	42.3%	60.0%	↑ 41.84%
CROATIA	44.2%	50.0%	59.2%	70.7%	↑ 19.43%
CYPRUS	38.0%	41.0%	52.2%	57.7%	↑ 10.54%
GEORGIA	22.2%	28.3%	35.3%	45.5%	↑ 28.90%
GREECE	46.0%	46.0%	46.2%	53.0%	↑ 14.72%
HUNGARY	52.5%	59.3%	65.3%	65.4%	↑ 0.15%
KOSOVO	21.5%	21.5%	20.7%	20.5%	↓ -0.97%
MACEDONIA	44.0%	51.0%	56.7%	56.7%	→ 0.00%
MONTENEGRO	41.3%	43.7%	49.6%	50.0%	↑ 0.81%
ROMANIA	33.4%	35.5%	40.2%	44.1%	↑ 9.70%
SERBIA	37.0%	55.9%	56.2%	56.4%	↑ 0.36%
SLOVENIA	64.8%	64.8%	71.0%	72.1%	↑ 1.55%
TURKEY	35.0%	45.0%	44.4%	45.7%	↑ 2.93%

Chapter 5

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Facts Sheets by Country

AL

GENERAL INFO

OFFICIAL NAME	REPUBLIC OF ALBANIA
POPULATION	2,821,977
GDP IN EURO PER CAPITA	€ 3,012.86
FILM SUPPORTING INSTITUTIONS (PUBLIC)	Albanian National center of Cinematography (ANCC)
PUBLIC FUNDING AVAILABLE EUR	€ 600,000.00
AVERAGE PRODUCTION BUDGET EUR	€ 800,000.00

DISTRIBUTION INFO

ADMISSIONS 2012	n/a
NATIONAL MARKET SHARES	n/a
CUMULATIVE BOX OFFICE IN EURO	n/a
NUMBER OF SCREENS	12
NUMBER OF DIGITAL SCREENS	7
% OF SCREENS IN MULTIPLEXES	33%
AVERAGE TICKET PRICE IN EURO	3.57
NUMBER OF VOD PLATFORMS	1
LIST OF VOD PLATFORMS IF POSSIBLE	Digitalb al

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

PRODUCTION INFO

NUMBER OF FEATURE FILM PRODUCED (not including feature documentaries)	1
NUMBER OF COPRODUCTIONS	
Minority coproductions	1
Majority coproductions	0
100% national films	0
NUMBER OF FEATURE DOCUMENTARIES PRODUCED	6
NUMBER OF SHORTS PRODUCED	1

GENERAL INFO

AT

OFFICIAL NAME	AUSTRIA
POPULATION	8,420,900
GDP IN EURO PER CAPITA	€ 36,430.00
FILM SUPPORTING INSTITUTIONS (PUBLIC)	19 (incl Austrian Film Institute, Fernsehfonds, ORF/ Film/Fernseh-Abkommen, Filmfonds Wien etc.)
PUBLIC FUNDING AVAILABLE EUR	€ 47,260,709.00
AVERAGE PRODUCTION BUDGET EUR	€ 1,790,000.00

DISTRIBUTION INFO

ADMISSIONS 2012	15,752,844
NATIONAL MARKET SHARES	3.60%
CUMULATIVE BOX OFFICE IN EURO	€ 124,323,885.00
NUMBER OF SCREENS	577
NUMBER OF DIGITAL SCREENS	393
% OF SCREENS IN MULTIPLEXES	48%
AVERAGE TICKET PRICE IN EURO	7.59
NUMBER OF VOD PLATFORMS	31
LIST OF VOD PLATFORMS IF POSSIBLE	flimmit, UPC, filmladen, ORF, A1, 3 Videothek, etc

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

PRODUCTION INFO

NUMBER OF FEATURE FILM PRODUCED (not including feature documentaries)	1
NUMBER OF COPRODUCTIONS	
Minority coproductions	1
Majority coproductions	0
100% national films	0
NUMBER OF FEATURE DOCUMENTARIES PRODUCED	6
NUMBER OF SHORTS PRODUCED	1

GENERAL INFO

OFFICIAL NAME	BOSNIA AND HERZEGOVINA
POPULATION	3,840,000
GDP IN EURO PER CAPITA	€ 3,435.10
FILM SUPPORTING INSTITUTIONS (PUBLIC)	Film Fund Sarajevo, Ministry of Culture of Republic Srpska, Ministry of Culture and Sports of Kanton Sarajevo
PUBLIC FUNDING AVAILABLE EUR	€ 1,200,000.00
AVERAGE PRODUCTION BUDGET EUR	€ 1,300,000.00

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

DISTRIBUTION INFO

ADMISSIONS 2012	799,045
NATIONAL MARKET SHARES	1.306%
CUMULATIVE BOX OFFICE IN EURO	2,023,280
NUMBER OF SCREENS	21
NUMBER OF DIGITAL SCREENS	12
% OF SCREENS IN MULTIPLEXES	0%
AVERAGE TICKET PRICE IN EURO	2.8
NUMBER OF VOD PLATFORMS	4
LIST OF VOD PLATFORMS IF POSSIBLE	BH Telecom, Eronet, Mtel, Logosoft

PRODUCTION INFO

NUMBER OF FEATURE FILM PRODUCED (not including feature documentaries)	2
NUMBER OF COPRODUCTIONS	
Minority coproductions	2
Majority coproductions	1
100% national films	1
NUMBER OF FEATURE DOCUMENTARIES PRODUCED	0
NUMBER OF SHORTS PRODUCED	21

GENERAL INFO

OFFICIAL NAME	BULGARIA
POPULATION	7,364,570
GDP IN EURO PER CAPITA	€ 5,415.70
FILM SUPPORTING INSTITUTIONS (PUBLIC)	Bulgarian National Film Centre
PUBLIC FUNDING AVAILABLE EUR	€ 6,186,631.00
AVERAGE PRODUCTION BUDGET EUR	€ 971,521.00

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

DISTRIBUTION INFO

ADMISSIONS 2012	4 041 364
NATIONAL MARKET SHARES	9.10%
CUMULATIVE BOX OFFICE IN EURO	17,191,832
NUMBER OF SCREENS	161
NUMBER OF DIGITAL SCREENS	107
% OF SCREENS IN MULTIPLEXES	83%
AVERAGE TICKET PRICE IN EURO	4.25
NUMBER OF VOD PLATFORMS	7
LIST OF VOD PLATFORMS IF POSSIBLE	owners - bTV Media Group, Vestitel BG, Vivacom, Mtel, Miramar, In Dreams, Neterra

PRODUCTION INFO

NUMBER OF FEATURE FILM PRODUCED (not including feature documentaries)	31
NUMBER OF COPRODUCTIONS	
Minority coproductions	5
Majority coproductions	2
100% national films	24
NUMBER OF FEATURE DOCUMENTARIES PRODUCED	5
NUMBER OF SHORTS PRODUCED	13

GENERAL INFO

OFFICIAL NAME	REPUBLIC OF CROATIA
POPULATION	4,291,000
GDP IN EURO PER CAPITA	€ 9,988.25
FILM SUPPORTING INSTITUTIONS (PUBLIC)	Croatian Audiovisual Centre
PUBLIC FUNDING AVAILABLE EUR	€ 6,800,000.00
AVERAGE PRODUCTION BUDGET EUR	€ 1,000,000.00

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

DISTRIBUTION INFO

ADMISSIONS 2012	3,876,497.00
NATIONAL MARKET SHARES	8.61%
CUMULATIVE BOX OFFICE IN EURO*	14,832,770.77
NUMBER OF SCREENS	146
NUMBER OF DIGITAL SCREENS	100
% OF SCREENS IN MULTIPLEXES	70%
AVERAGE TICKET PRICE IN EURO	3.83
NUMBER OF VOD PLATFORMS	5
LIST OF VOD PLATFORMS IF POSSIBLE	Max TV,B-net, Iskon, H1, Optima Telekom

PRODUCTION INFO

NUMBER OF FEATURE FILM PRODUCED (not including feature documentaries)	17
NUMBER OF COPRODUCTIONS	7
Minority coproductions	3
Majority coproductions	4
100% national films	10
NUMBER OF FEATURE DOCUMENTARIES PRODUCED	15
NUMBER OF SHORTS PRODUCED	41

GENERAL INFO

OFFICIAL NAME	CYPRUS
POPULATION	838,897
GDP IN EURO PER CAPITA	€ 20,319.63
FILM SUPPORTING INSTITUTIONS (PUBLIC)	Ministry of Education and Culture of Cyprus / Cinema Section, Media Desk Cyprus
PUBLIC FUNDING AVAILABLE EUR	€ 1,000,000.00
AVERAGE PRODUCTION BUDGET EUR	n/a

EUROPEAN CONVENTION ON CINEMATOGRAPHIC CO-PRODUCTIONS	YES
SEE CINEMA NETWORK	YES
EURIMAGES	YES
MEDIA	YES
EUROPEAN AUDIOVISUAL OBSERVATORY	YES
EUROPEAN FILM PROMOTION	NO
TAX INCENTIVES	NO

DISTRIBUTION INFO

ADMISSIONS 2012	900,000
NATIONAL MARKET SHARES	n/a
CUMULATIVE BOX OFFICE IN EURO	n/a
NUMBER OF SCREENS	47
NUMBER OF DIGITAL SCREENS	21
% OF SCREENS IN MULTIPLEXES	n/a
AVERAGE TICKET PRICE IN EURO	8.77
NUMBER OF VOD PLATFORMS	7
LIST OF VOD PLATFORMS IF POSSIBLE	n/a

PRODUCTION INFO

NUMBER OF FEATURE FILM PRODUCED (not including feature documentaries)	n/a
NUMBER OF COPRODUCTIONS	n/a
Minority coproductions	n/a
Majority coproductions	n/a
100% national films	n/a
NUMBER OF FEATURE DOCUMENTARIES PRODUCED	n/a
NUMBER OF SHORTS PRODUCED	n/a

4 including documentaries

GENERAL INFO

OFFICIAL NAME	GEORGIA
POPULATION	4,483,000
GDP IN EURO PER CAPITA	€ 2,665.21
FILM SUPPORTING INSTITUTIONS (PUBLIC)	Georgian National Film Centre
PUBLIC FUNDING AVAILABLE EUR	€ 2,000,000.00
AVERAGE PRODUCTION BUDGET EUR	€ 400,000.00

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

DISTRIBUTION INFO

ADMISSIONS 2012	600,000
NATIONAL MARKET SHARES	
CUMULATIVE BOX OFFICE IN EURO	€ 2,400,000
NUMBER OF SCREENS	9
NUMBER OF DIGITAL SCREENS	7
% OF SCREENS IN MULTIPLEXES	0%
AVERAGE TICKET PRICE IN EURO	4
NUMBER OF VOD PLATFORMS	1
LIST OF VOD PLATFORMS IF POSSIBLE	www.myvideo.ge

PRODUCTION INFO

NUMBER OF FEATURE FILM PRODUCED (not including feature documentaries)	12
NUMBER OF COPRODUCTIONS	5
Minority coproductions	1
Majority coproductions	4
100% national films	7
NUMBER OF FEATURE DOCUMENTARIES PRODUCED	5
NUMBER OF SHORTS PRODUCED	20

GENERAL INFO

OFFICIAL NAME	GREECE
POPULATION	10,815,197
GDP IN EURO PER CAPITA	€ 16,982.63
FILM SUPPORTING INSTITUTIONS (PUBLIC)	The Greek Film Centre
PUBLIC FUNDING AVAILABLE EUR	€ 2,000,000.00
AVERAGE PRODUCTION BUDGET EUR	€ 450,000.00

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

DISTRIBUTION INFO

ADMISSIONS 2012	9,977,275
NATIONAL MARKET SHARES	12%
CUMULATIVE BOX OFFICE IN EURO	79,818,200
NUMBER OF SCREENS	493
NUMBER OF DIGITAL SCREENS	119
% OF SCREENS IN MULTIPLEXES	21%
AVERAGE TICKET PRICE IN EURO	8
NUMBER OF VOD PLATFORMS	
LIST OF VOD PLATFORMS IF POSSIBLE	

PRODUCTION INFO

NUMBER OF FEATURE FILM PRODUCED (not including feature documentaries)	25
NUMBER OF COPRODUCTIONS	4
Minority coproductions	1
Majority coproductions	3
100% national films	21
NUMBER OF FEATURE DOCUMENTARIES PRODUCED	19
NUMBER OF SHORTS PRODUCED	85

HU

GENERAL INFO

OFFICIAL NAME	HUNGARY
POPULATION	9,962,000
GDP IN EURO PER CAPITA	€ 9,806.51
FILM SUPPORTING INSTITUTIONS (PUBLIC)	Hungarian National Film Fund (MNFA), Foundation of the Hungarian Historical Motion
PUBLIC FUNDING AVAILABLE EUR	n/a
AVERAGE PRODUCTION BUDGET EUR	n/a

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

DISTRIBUTION INFO

ADMISSIONS 2012	9.5
NATIONAL MARKET SHARES	1.9%
CUMULATIVE BOX OFFICE IN EURO	41,118,000
NUMBER OF SCREENS	400
NUMBER OF DIGITAL SCREENS	300
% OF SCREENS IN MULTIPLEXES	n/a
AVERAGE TICKET PRICE IN EURO	4.31
NUMBER OF VOD PLATFORMS	7
LIST OF VOD PLATFORMS IF POSSIBLE	n/a

PRODUCTION INFO

NUMBER OF FEATURE FILM PRODUCED (not including feature documentaries)	n/a
NUMBER OF COPRODUCTIONS	n/a
Minority coproductions	n/a
Majority coproductions	n/a
100% national films	n/a
NUMBER OF FEATURE DOCUMENTARIES PRODUCED	n/a
NUMBER OF SHORTS PRODUCED	n/a
27 including documentaries	

GENERAL INFO

KS

OFFICIAL NAME	KOSOVO
POPULATION	1,803,000
GDP IN EURO PER CAPITA	€ 2,756.00
FILM SUPPORTING INSTITUTIONS (PUBLIC)	Kosovo Cinematography Centre
PUBLIC FUNDING AVAILABLE EUR	n/a
AVERAGE PRODUCTION BUDGET EUR	n/a

EUROPEAN CONVENTION ON CINEMATOGRAPHIC CO-PRODUCTIONS	NO
SEE CINEMA NETWORK	NO
EURIMAGES	NO
MEDIA	NO
EUROPEAN AUDIOVISUAL OBSERVATORY	NO
EUROPEAN FILM PROMOTION	YES
TAX INCENTIVES	NO

DISTRIBUTION INFO

ADMISSIONS 2012	40.000
NATIONAL MARKET SHARES	n/a
CUMULATIVE BOX OFFICE IN EURO	120.000
NUMBER OF SCREENS	1
NUMBER OF DIGITAL SCREENS	0
% OF SCREENS IN MULTIPLEXES	0
AVERAGE TICKET PRICE IN EURO	3
NUMBER OF VOD PLATFORMS	0
LIST OF VOD PLATFORMS IF POSSIBLE	

PRODUCTION INFO

NUMBER OF FEATURE FILM PRODUCED (not including feature documentaries)	4
NUMBER OF COPRODUCTIONS	4
Minority coproductions	2
Majority coproductions	2
100% national films	0
NUMBER OF FEATURE DOCUMENTARIES PRODUCED	1
NUMBER OF SHORTS PRODUCED	5

GENERAL INFO

OFFICIAL NAME	REPUBLIC OF MACEDONIA
POPULATION	2,023,000
GDP IN EURO PER CAPITA	€ 3,605.65
FILM SUPPORTING INSTITUTIONS (PUBLIC)	Macedonian Film Fund
PUBLIC FUNDING AVAILABLE EUR	€ 3,600,000.00
AVERAGE PRODUCTION BUDGET EUR	n/a

EUROPEAN CONVENTION ON CINEMATOGRAFIC CO-PRODUCTIONS	YES
SEE CINEMA NETWORK	YES
EURIMAGES	YES
MEDIA	NO
EUROPEAN AUDIOVISUAL OBSERVATORY	YES
EUROPEAN FILM PROMOTION	YES
TAX INCENTIVES	NO

DISTRIBUTION INFO

ADMISSIONS 2012	203,984
NATIONAL MARKET SHARES	n/a
CUMULATIVE BOX OFFICE IN EURO	512,470
NUMBER OF SCREENS	29
NUMBER OF DIGITAL SCREENS	26
% OF SCREENS IN MULTIPLEXES	31%
AVERAGE TICKET PRICE IN EURO	1.7
NUMBER OF VOD PLATFORMS	1
LIST OF VOD PLATFORMS IF POSSIBLE	Makedonski Telekom AD

PRODUCTION INFO

NUMBER OF FEATURE FILM PRODUCED (not including feature documentaries)	3
NUMBER OF COPRODUCTIONS	3
Minority coproductions	0
Majority coproductions	3
100% national films	0
NUMBER OF FEATURE DOCUMENTARIES PRODUCED	1
NUMBER OF SHORTS PRODUCED	4

GENERAL INFO

OFFICIAL NAME	MONTENEGRO
POPULATION	620,029
GDP IN EURO PER CAPITA	€ 5,298.96
FILM SUPPORTING INSTITUTIONS (PUBLIC)	Ministry of Culture of Montenegro
PUBLIC FUNDING AVAILABLE EUR	n/a
AVERAGE PRODUCTION BUDGET EUR	n/a

EUROPEAN CONVENTION ON CINEMATOGRAFIC CO-PRODUCTIONS	YES
SEE CINEMA NETWORK	NO
EURIMAGES	NO
MEDIA	NO
EUROPEAN AUDIOVISUAL OBSERVATORY	YES
EUROPEAN FILM PROMOTION	YES
TAX INCENTIVES	NO

DISTRIBUTION INFO

ADMISSIONS 2012	221.188
NATIONAL MARKET SHARES	n/a
CUMULATIVE BOX OFFICE IN EURO	764,811.10
NUMBER OF SCREENS	18
NUMBER OF DIGITAL SCREENS	6
% OF SCREENS IN MULTIPLEXES	100
AVERAGE TICKET PRICE IN EURO	3
NUMBER OF VOD PLATFORMS	1
LIST OF VOD PLATFORMS IF POSSIBLE	Extra TV

PRODUCTION INFO

NUMBER OF FEATURE FILM PRODUCED (not including feature documentaries)	6
NUMBER OF COPRODUCTIONS	4
Minority coproductions	4
Majority coproductions	0
100% national films	2
NUMBER OF FEATURE DOCUMENTARIES PRODUCED	2
NUMBER OF SHORTS PRODUCED	6

RO

GENERAL INFO

OFFICIAL NAME	ROMANIA
POPULATION	19,043,767
GDP IN EURO PER CAPITA	€ 6,109.87
FILM SUPPORTING INSTITUTIONS (PUBLIC)	Romanian National Film Center, CNC Romania
PUBLIC FUNDING AVAILABLE EUR	€ 19,000,000.00
AVERAGE PRODUCTION BUDGET EUR	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

DISTRIBUTION INFO

ADMISSIONS 2012	8,348,538
NATIONAL MARKET SHARES	13.02%
CUMULATIVE BOX OFFICE IN EURO	32,494,122
NUMBER OF SCREENS	264
NUMBER OF DIGITAL SCREENS	137
% OF SCREENS IN MULTIPLEXES	69.34%
AVERAGE TICKET PRICE IN EURO	3.89
NUMBER OF VOD PLATFORMS	
LIST OF VOD PLATFORMS IF POSSIBLE	

PRODUCTION INFO

NUMBER OF FEATURE FILM PRODUCED (not including feature documentaries)	19
NUMBER OF COPRODUCTIONS	10
Minority coproductions	2
Majority coproductions	8
100% national films	9
NUMBER OF FEATURE DOCUMENTARIES PRODUCED	7
NUMBER OF SHORTS PRODUCED	10

GENERAL INFO

RS

OFFICIAL NAME	SERBIA
POPULATION	7,120,000
GDP IN EURO PER CAPITA	€ 3,806.25
FILM SUPPORTING INSTITUTIONS (PUBLIC)	Film Centre Serbia; Assembly of the City of Belgrade, Secretariat for Culture; Secretariat for Culture Autonomous Province of Vojvodina
PUBLIC FUNDING AVAILABLE EUR	€ 3,000,000.00
AVERAGE PRODUCTION BUDGET EUR	€ 700,000.00

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	YES

DISTRIBUTION INFO

ADMISSIONS 2012	2,518,986
NATIONAL MARKET SHARES	18.00%
CUMULATIVE BOX OFFICE IN EURO	7,078,765
NUMBER OF SCREENS	123
NUMBER OF DIGITAL SCREENS	24
% OF SCREENS IN MULTIPLEXES	8.94%
AVERAGE TICKET PRICE IN EURO	2.5
NUMBER OF VOD PLATFORMS	2
LIST OF VOD PLATFORMS IF POSSIBLE	Open IPTV, SBB

PRODUCTION INFO

NUMBER OF FEATURE FILM PRODUCED (not including feature documentaries)	17
NUMBER OF COPRODUCTIONS	10
Minority coproductions	5
Majority coproductions	5
100% national films	7
NUMBER OF FEATURE DOCUMENTARIES PRODUCED	10
NUMBER OF SHORTS PRODUCED	85

GENERAL INFO

OFFICIAL NAME	REPUBLIC OF SLOVENIA
POPULATION	2,057,000
GDP IN EURO PER CAPITA	€ 20,319.63
FILM SUPPORTING INSTITUTIONS (PUBLIC)	Slovenian Film Centre
PUBLIC FUNDING AVAILABLE EUR	€ 4,758,842.00
AVERAGE PRODUCTION BUDGET EUR	€ 709,245.00

DISTRIBUTION INFO

ADMISSIONS 2012	2,742,350
NATIONAL MARKET SHARES	
CUMULATIVE BOX OFFICE IN EURO	12,002,517
NUMBER OF SCREENS	110
NUMBER OF DIGITAL SCREENS	18
% OF SCREENS IN MULTIPLEXES	34.5%
AVERAGE TICKET PRICE IN EURO	4.38
NUMBER OF VOD PLATFORMS	3
LIST OF VOD PLATFORMS IF POSSIBLE	Siol, T-2, Telemach

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

PRODUCTION INFO

NUMBER OF FEATURE FILM PRODUCED (not including feature documentaries)	6
NUMBER OF COPRODUCTIONS	4
Minority coproductions	2
Majority coproductions	2
100% national films	2
NUMBER OF FEATURE DOCUMENTARIES PRODUCED	2
NUMBER OF SHORTS PRODUCED	

GENERAL INFO

OFFICIAL NAME	TURKEY
POPULATION	75,627,384
GDP IN EURO PER CAPITA	€ 8,169.07
FILM SUPPORTING INSTITUTIONS (PUBLIC)	Republic of Turkey Ministry of Culture and Tourism
PUBLIC FUNDING AVAILABLE EUR	€ 8,500,000.00
AVERAGE PRODUCTION BUDGET EUR	n/a

DISTRIBUTION INFO

ADMISSIONS 2012	43,935,763
NATIONAL MARKET SHARES	46.6%
CUMULATIVE BOX OFFICE IN EURO	165,062,001
NUMBER OF SCREENS	1979
NUMBER OF DIGITAL SCREENS	313
% OF SCREENS IN MULTIPLEXES	15.8%
AVERAGE TICKET PRICE IN EURO	3.84
NUMBER OF VOD PLATFORMS	8
LIST OF VOD PLATFORMS IF POSSIBLE	Tivibu, Kanal D Film, Mubi, Muvizi, Itunes, Tiglon Box, Film Box, Digiturk

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	NO

PRODUCTION INFO

NUMBER OF FEATURE FILM PRODUCED (not including feature documentaries)	61
NUMBER OF COPRODUCTIONS	5
Minority coproductions	
Majority coproductions	5
100% national films	56
NUMBER OF FEATURE DOCUMENTARIES PRODUCED	
NUMBER OF SHORTS PRODUCED	

