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HiQSTEP

THE SITUATION OF CINEMA AND THE AUDIOVISUAL INDUSTRIES IN THE EASTERN PARTNERSHIP COUNTRIES

REGIONAL REPORT

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Preface

This regional study on the Situation of Cinema and the Audiovisual Industries in the Eastern Partnership (EaP) Region is part of the project 'Short term high quality studies to support activities under the Eastern Partnership – HiQSTEP, EuropeAid/132574/C/SER/Multi', carried out by an international consortium under the leadership of Kantor Management Consultants to support the activities of Platform 4 `Contacts between people`.

In the context of Creative Europe and of the EaP Platform 4 Work Programme this mapping study was supposed to enhance the EaP countries knowledge of the regional context in which their industries operate and of the situation in other countries. It was also supposed to help the European Commission to structure the discussions under Platform 4 and readjust its actions to better address the actual needs and challenges in the region and in individual countries.

The study has been implemented by the study team under the leadership of Mr Terry Sandell who was supported on data collection by Ms Maria Mirzoyan (Armenia), Mr Jahangir Selimkhanov (Azerbaijan), Mr Anton Sidarenka (Belarus), Ms Lana Ghvinjilia (Georgia), Mr Ion Bunduchi (Moldova) and Ms Julia Sinkevych (Ukraine).

Overall supervision of the study has been carried out by Przemysław Musiałkowski, Team Leader of the HiQSTEP Project.

Sincere thanks go to the national stakeholders in the Eastern Partnership Countries who provided information in interviews and responses to questionnaires.

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OBJECTIVES

The overall objective of this Study was to help the EaP countries to better understand the situation, including possible problems, of the audio-visual sector in the region. More specifically, the study was supposed to provide a comprehensive overview and analysis of the situation in the region and individual countries as well as a detailed description the audiovisual industries in the EAP countries.

STUDY BACKGROUND

The commissioning of the Eastern Partnership Audiovisual Study under the HiQSTEP Project has been timely because of various important background and context factors. These include:

- EU priority interest in the cultural and creative industries, including the audiovisual sector, from the point of view of the contribution they can make to sustainable social and economic development, not least in relation to employment creation
- Heightened EU interest and increasing understanding of the Eastern Partnership region in the context of three of the countries having signed Association Agreements
- Current re-examination and probable future changes of EU Neighbourhood Policy and a fresh approach to relations with the Eastern Partnership countries, with at least part of the policy discussion including the cultural dimension
- Radical changes implemented last year through the unified 'Creative Europe Programme' which represents a new model for EU funding of culture and consists of two sub-themes, audiovisual and culture
- Membership of, and therefore access to the 'Creative Europe Programme', for two of the EaP countries (Moldova and Georgia) with a third (Ukraine) joining imminently and two others (Armenia and Azerbaijan) expressing some interest in participating in one form or another
- The launching of a new EU-EaP Culture Programme 2015-2018 which is focussed on technical assistance and policy support with the cultural and creative industries as one area of priority
- The evident priority in all the six EaP countries being given to cinema and film as far as cultural policy is concerned. This includes the revival of film production, repair and renewal of infrastructure and new developments in national cinema in response to the disastrous collapse of the industry in the post-Soviet period
- Rapid and radical ongoing changes in the audiovisual area, driven by technological developments, which are presenting extremely complex monitoring, regulatory, legislative, social and economic challenges for governments with which they find it increasingly difficult to navigate
- Development of a new European Convention on Cinematographic Co-production whose changes should work to the advantage of the countries in the region, all of whom are increasingly involved in international co-production activity.

Current practices of the Eastern Partnership Audiovisual Industries

The Study has confirmed that the countries are quite different in terms of their domestic data collection systems, the quality of what is collected and the degree to which the data is made available. While not unexpected, and not confined to the audiovisual sector, the Study has highlighted a major need shared by all the countries in the region - the problem of lack of availability of reliable, consistent and systematised information and statistical data which can be used for analytical purposes and to develop evidence-based cultural policy.

This issue, lack of a solid, available and useable factual and statistical 'toolbox' which can be used for practical policy and management purposes, has been discussed during the course of the Study with several current and past ministers and deputy ministers in the region, all of whom have formally or informally confirmed that it is a serious problem. As a result, this constitutes the single most important strategic recommendation from the Study and is addressed in the Recommendations section at the end of this report.

Cinema and Film: Priority Areas in All the EaP Countries

While cinema and film are a priority in all countries in policy terms there are very great differences in the stage at which the countries are in terms of cinema revival or rebirth. It must be understood that this is happening against a background of a catastrophic post-Soviet collapse in the 1990s of a previously strong cinema and film infrastructure. This disastrous situation has continued for almost two decades. All the countries are now addressing this situation but of course the resources available and the approaches differ.

Considerable investment and attention in comparative terms is being put into the renaissance of cinema in the individual countries and brief examples from each country illustrate this and together give a general regional overview of current developments.

In Armenia, after going around in circles for five years and more in connection with draft cinema legislation and suffering from extremely poor exhibition/screening facilities, there is a new desire to move forward. In particular there is a commitment to increase the international possibilities potentially open to Armenian cinema and a more evident motivation to build on success, including on some excellent initiatives of the Golden Apricot International Film Festival which represents the face of Armenian cinema internationally. One or two of their successful initiatives have been controversial but of significance beyond a cinema context, notably the work the Festival has done to promote Armenian-Turkish film cooperation. It is a courageous example of intercultural dialogue. Armenia's fresh approach to international cinema cooperation is also illustrated by its current interest in Eurimages. It should be noted too that it is the only country in the region that is a member of the European Audiovisual Observatory.

In Azerbaijan, in another example of that country's use of its economic resources to build up aspects of its cultural infrastructure and make its mark internationally, there is a ten-year, properly funded, development programme for cinema (2008-2018). This covers all aspects of cinema and filmmaking from financing, commissioning and production through to exhibition/screening facilities. It includes the establishment of many new cinemas in Baku and provision of international state-of-the-art film archive and heritage facilities.

In Belarus, substantial investment is being put into upgrading and extending production and related facilities at Belarusfilm, the state studio which still monopolises a lot of production in the country. Alongside capital investment, there have also been interesting developments at Belarusfilm in terms of experimenting with new forms of international film cooperation. There has, for example, been a new approach to co-production opportunities with Europe and elsewhere, alongside the established Russian de facto market domination of the Belarusian film industry.

In Georgia, there is already an internationally recognised new wave of young Georgian filmmakers reviving the country's Soviet-era reputation for filmmaking. This revival can be seen to be linked directly and indirectly to wider, progressive general reforms in Georgia (e.g. 'de-Sovietisation' and measures to make the climate for small and medium businesses better). It is also directly the result of the work of the Georgian National Film Centre. In the last few years the Georgian National Film Centre has been pioneering fresh ideas, establishing a new brand of professionalism, demonstrating openness and transparency and in general offering a successful model which, perhaps adapted to local specificities, could be very relevant to other countries in the region.

In Moldova, challenged by resource constraints and working from a more modest base, green shoots are appearing. A Law on Cinema was passed in July 2014 which has cleared the way for a new cinema policy which includes establishment of a National Film Centre and the opportunity to put in place fundamental elements essential for the healthy development of a national cinema and for international engagement e.g. formal definition of what constitutes a 'national product' which then facilitates international co-production. Moldova joined the European Convention on Cinematographic Co-productions in 2011, but like other countries in the region that joined earlier, has been unable to make use of it. 'Unofficial' co-production has taken place, particularly with Romania, but the new legislation and related developments, including membership of 'Creative Europe', should fast-track the country into the mainstream and help it catch up on European and international co-production opportunities.

In Ukraine, while clear cinema and audiovisual policy is still absent[1], national cinema is one of the priorities in an emerging but contested cultural strategy which is focusing on 'national product'. While there is a general recognition of the special role of cinema, cinema development in Ukraine is particularly complicated currently not only because of war and the economic situation but also because certain important lingering Soviet legacy challenges have hitherto never been properly addressed[2]. These include what to do with the national Dovzhenko Studios in Kyiv and another Soviet dinosaur, the two-thousand membership-strong Union of Cinema Workers, most of who are

[1] It is not that there has not been policy, it is mainly that there have been policy initiatives which have been started and then aborted for political reasons, because of a change of government or simply because of a change of minister. This phenomenon is a common weakness in some of the countries of the region. In Ukraine exhaustive work was done on cinema legislation a decade ago but it faltered because of language issues and politics. A new Ukrainian Ministry of Culture draft cultural strategy has recently been made public (April/May 2015) and at the current time, energised by the Maidan events, there is considerable and contested debate and work being done on cultural policy both at government and non-government level.

[2] These lingering Soviet legacy challenges also exist to a greater or lesser degree in the other EaP countries and are discussed in more detail later. the countries of the region these dinosaur 'unions' continue to exist. Membership consists often and mainly of an older, non-practising generation but the 'Union' sometimes represents a powerful lobby even though it, and its members, may be marginal or irrelevant to contemporary cultural practice and output. Many of these 'old guard' members, for various reasons, would like a return to the old system and closed access to opportunities sometimes representing a threat to recently introduced transparent and open practices and competitive funding procedures. Georgia is perhaps an example of where democratic and transparent good practices successfully developed by the Georgian National Film Centre could still be undermined by such a lobby.

no longer engaged in filmmaking.[3] While such lingering Soviet-legacy issues remain largely untackled, there have been new and modernising developments, sometimes modest, such as the creation of the Motion Picture Association of Ukraine, a new-style professional membership association. In this positive context it should be noted that there is a healthily developing, national-level and internationally focussed, all-year industry component to the Odessa International Film Festival, notwithstanding that festival's uncertain financial circumstances.

DEALING WITH THE PAST AND COMMON NEEDS AND THEMES

While, as has been mentioned above, in all six countries in policy terms there are differences in both the stage at which the countries are in terms of cinema revival or rebirth, the resources available and the approaches, there are many themes and needs common to the region, as well as many new challenges which they share with EU Member States.

To flourish national cinema and filmmaking have particularly complex needs everywhere. This is not least as a result of the dichotomy of their being both a particularly powerful form of art and cultural expression on the one hand and an important investment business and industry on the other. The total state domination of cinema and filmmaking in the Soviet era still exerts a continuing influence even after more than twenty years of independence. For example, the 'State Committee' model for control of the management and regulation of the cinema sector, even in those cases where the model itself no longer exists, seems to have bequeathed some anachronistic practices. In tandem with that, the Soviet 'creative union' structure which selected and controlled those who worked in the audiovisual sector, similarly still has a direct and indirect mainly negative influence on the cinema scene in all the EaP countries. Even where some reform or change has taken place, it could be argued that the legacy of 'State Committee' practices and thinking and the institution of the 'creative union' have been significant barriers to progress in developing a much-needed modernisation process.

It is still broadly true that with the exception of Georgia, where a good and often exemplary start has been made by the Georgian National Film Centre, these inherited and mutated models both actively and subliminally shape a lot of what goes on in the region's audiovisual sectors. Such things as effective modernisation measures, for example those related to transparent and competitive production grants, or imaginative encouragement of alternative non-state sources of investment, or incentivisation facilitating public-private partnerships are not yet in place or in the occasional instances where they are in place, they are not yet fully functioning and established.

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[3] The Soviet-era 'creative unions', including the Union of Cinematographers. Administratively powerful and financially stable, the Union of Cinematographers institutionally had various non-cinema related functions such as distribution of housing, access to cars and consumer goods and so on. A main purpose of the `Union of Cinematographers was to facilitate state political control of filmmaking with membership confined to those who were considered reliable. Only members were able to make films. In most of

THE MAIN CHALLENGES

Against a positive background, therefore, of cinema and filmmaking being a priority in all six countries with a number of fresh initiatives and changes, the main, but not only, challenges for the EaP countries can be seen as four-fold:

- dealing with distorting Soviet-era legacies. This includes the not yet entirely extinguished Soviet notion of the state as sole commissioner, producer and funder of film production, examples of non-consultative top-down 'State Committee' and 'Party' style policy formulation which are often still in evidence, 'closed' Unions of Cinematographers which still have significant lobbying influence even though its members are mainly older generation and no longer active practitioners, huge non-viable state studio production facilities with outdated or obsolete equipment and unreformed sclerotic and anachronistic specialised education and training systems
- addressing the ramifications created by the catastrophic collapse in the 1990s and beyond of all aspects - financing, production, distribution, exhibition, conservation - of the cinema infrastructure. The impact was not only on the industry itself but affected society as a whole. For example the impact it had on audiences. There is a younger generation in some of the countries of the region who have never had a 'cinema experience' because of mass closure of screening facilities, especially in the provinces but also to a dramatic degree even in the capital cities. The problem of screening facilities especially outside of the capital is paralleled in all the countries by the absence of a healthily-functioning distribution system
- understanding and then being able to create policies, legislation and skills training opportunities to catch up with and respond to the on-going revolution in digital technologies and other evolving developments in the audiovisual industry. This includes dealing with the demise of old financing and business models, supporting in timely fashion the mushrooming of new opportunities and adapting to rapidly changing cultural[4] and commercial markets. The question arises as to whether there is a potential danger that the countries' understandable desire to 'repair the past' - the catastrophic collapse in the 1990s - may be dominating the countries' nascent modernising agendas which should be more digitally and future-focussed. Are the various modernising agendas for the audiovisual sectors in the region to a certain degree based on a historical perception of a traditional national cinema industry rather than on the pursuit of a strategy of state intervention and support based on fast-changing and radically different future realities and needs?
- getting on top of intellectual property (IP) issues in the audiovisual sector. Another area of extremely difficult practical reality as sometimes 'pirating'[5] has become almost institutional-

[4] e.g. the tastes and consumption behaviour of a more visually-aware younger generation

[5] It is not uncommon in the region for even TV channels illegally to broadcast feature films. The problems and anomalies for governments in the region simultaneously to make real efforts to introduce better protection of IP while at the same time paradoxically being perpetrators is perhaps symbolically illustrated by Georgia's highest court until very recently (it has now signed license agreements) recording cases related to breaches of IP legislation and rules on its computers which were installed with pirated Microsoft software. It should be noted that Georgia in terms of conforming and implementing international IP regulations is probably ahead of the other countries in the region.

ised. It is far more complex than it is for EU Member States. Although 'pirating' mainly affects foreign and international IP owners[6], it is an increasingly important barrier and disincentive to investing in domestic audiovisual production. Developing policies that create the 'climate' for sustainable investment and funding support for national cinema and other audiovisual products and for international co-production opportunities is another of the needs of this sector e.g. making things 'business-friendly', providing practical support for producers[7], facilitating profitability and so on. The 'climate' - not only related to IP issues - is often not only unsupportive but positively hostile, sometimes amounting to the equivalent of totally unnecessary 'own goals' to take a football analogy. Examples include Tax Code regulations in some of the countries where, for example, distinction is not made between grants, investment and income and where all three for tax purposes are treated as 'profit'. This very important and mainly neglected Tax Code issue is highlighted in the Recommendations section and is part of a more general observation that incentivisation levers are in general not used in cultural policy in the region.

The Audiovisual Production and Commercialisation Life-Cycles in the EaP Region

If one looks at the audiovisual industries in the countries in the region in terms of their two life-cycles - the production life-cycle (i.e. the development and production stages) and the commercialisation life-cycle (i.e. distribution, exhibition and broadcasting), there are many common regional features, again much of it emanating from the lingering Soviet legacy mentioned above.

In terms of the production life-cycle, common features include, especially in the case of cinema, dominant state funding of production with very little private investment. The nature of this state funding is beginning to change in some of the countries with the slow introduction of more transparency, competition and the opening up of government grant systems at least to some degree to non-state players. On the other hand, some old Soviet practices related to production still persist such as the system of 'state orders' where the government still acts as commissioner, producer and funder, usually using the state national studio, to create product which it feels is politically or morally 'desirable'.

In general, for various reasons, the commercialisation life-cycle is not well-developed in the countries of the region. In this context the growth in international co-productions in which all the countries are participating is beginning to have a healthy effect, either because marketing and distribution is being carried out by an experienced international partner or by exposure to and learning from good international practice. If improvements are being seen in terms of international distribution through co productions, by contrast domestic national distribution systems are weak and in

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[6] Examples can be found ninth region, for example of licensed television companies illegally broadcasting foreign feature films.

[7] It should be remembered that even the concept and role of 'producer' has a relatively short history in the EaP countries. In the Soviet era there was only one producer - the state. The employment codes in some of the countries have still not caught up with and administratively recognised many professions and job categories vital in contemporary, modernised economies.

some cases hardly exist. Nothing has really replaced the old Moscow-based Soviet distribution system. The vacuum is being filled in areas where it is profitable by commercial Russian companies, some of whom engage in practices that are not always supportive of national policy.

The problems in the region in terms of distribution are in large measure connected with the catastrophic collapse of screening facilities in the 1990s and beyond. The need for distribution of course diminished as the number of screens dwindled and the absence of distribution also contributed to the closure of at least some screens. The situation is slowly starting to ameliorate. For many years and until very recently, for example, it was regularly reported that in Armenia there were only one and a half screens in existence in the country. Even in Georgia, where as mentioned elsewhere in this report much progress has been made, the paucity of screens is still an issue.

It could be argued that part of the current problems related to distribution can be attributed to the continuing dominance of cinema by the state and is a result of government choice of prioritisation. In some cases there is a total official focus on production but neglect of distribution, exhibition and broadcasting issues.

External 'Non-Cultural' Factors Affecting the Audiovisual Sectors of the Countries

When looking at the broader cultural sector and at the audiovisual sector in particular, it is important to understand, although it is usually not recognised in the region itself, that the barriers and constraints to good and sensible cultural policy are often to be found outside of the cultural or audiovisual sector itself. That said, inside the cultural and audiovisual sectors there are systemic problems creating barriers and constraints. The causes of the absence of healthy incentivisation and stimulation of modernisation or growth in the wider cultural sector are partly to do with the continuing existence of a basically Soviet 'Ministry of Culture' model, albeit mutated and improved, which is still found in all six countries. While they may seem to differ quite a lot from country to country, the Ministries of Culture mainly operate on the basis of seeing culture as what their Ministry does, rather than what culture is now or the humanitarian, social and economic role it should play in a contemporary modernising country. The Ministries tend to be weak in terms of research, policy and effective strategic management but on the other hand are still very actively engaging in hands-on event management as if, as in the Soviet past, the state is the only producer.

Notwithstanding the systemic problems mentioned above emanating from within the cultural sector and from mainly anachronistic Ministries of Culture, the causes of the absence of healthy incentivisation and other forms of stimulation of modernisation or growth in the wider cultural sector are found outside the sector and the immediate functions of those Ministries of Culture. One can take one important example to illustrate this - the area of legislation. However good specific cultural or audiovisual legislation may be, there is a problem in all the countries of the region that it is non-cultural legislation which often has the greatest impact, usually negatively, on the cultural and audiovisual sector.

Mention has already been made of regulations related to the Tax Code, but similar 'own goals' can be found in the countries' Employment Codes[8], in their Customs and Excise practices[9], in policies (or the absence of them) and regulations related to the creation and operation of SMEs, in unnecessary bureaucratic procedures for registration of legal entities and how VAT functions. All of these impact dramatically on the cultural sector and not least on the audiovisual sector. Taking the example given earlier, state definitions of what is 'income', what is 'investment' and what is a 'grant' can mean the difference in the audiovisual sector of a film being made or not being made, of a cultural or creative organisation surviving or dying.

There appears to be very limited active recognition in the region at state level of what has just been described. It does not appear to be a priority remit of the region's Ministries of Culture. This is possibly not by active and conscious choice but may be because Ministries of Culture are lower in the state 'pecking order' than most other ministries and therefore do not have sufficient within-government political influence or leverage. The strong tradition of vertical top-down state management and absence of horizontal, joined-up government lower than at the apex of state power means that such issues, problems and 'own goals' cannot easily be institutionally managed. It is very rare that Ministries of Culture manage to engage other ministries either in culture agendas or are able to convince and demonstrate the positive role culture can play in contributing to the agendas of other ministries.[10]

LEGISLATION ISSUES

Mention has just been made of legislation. There is of course a need for good cultural and audiovisual legislation. The reality, however, is that legislation in the Eastern Partnership region usually follows, rather than leads or determines, what happens in a given field. Legislation Is often passed but not Implemented or enforced. The detail of cultural legislation is frequently unknown to those who are supposed to be implementing it (especially in the regions). Because it usually addresses past problems and immediate concerns rather than anticipating future needs, cultural legislation in the region quickly goes out of date and becomes redundant.

Examining cultural legislation in the Eastern Partnership region as the Study has done has been more important for what it reveals about other things rather than about how effective legislation is in practice. One can take specific country examples to illustrate this point. In Armenia they have,

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[8] For example in some of the countries until recently the profession of 'producer' did not exist in their employment codes.

[9] There are examples of where some provision is made in legislation (e.g. customs-free import of foreign equipment for shooting a film) but which is not implemented because customs officials are unaware of the regulations.

[10] It is worth noting in this context that as a possibly regional 'first', the Georgian Ministry of Culture and Monuments is organising in June 2015 a two-day Retreat/Conference for deputy minister level representatives from other ministries to brief and involve them and receive feedback on the Georgian National Culture Strategy which is currently being developed.

as mentioned above, spent more than five years trying to develop a Law on Cinema. This is indicative of the complex and contested views of the politicians and industry professionals involved. It is also probably indicative of the low priority given to cultural legislation in relation to other legislation in the overcrowded agendas and timetables of the country's parliament and drafting committee which is typical of the region as a whole. In Azerbaijan, although cinema is one of the very major priorities with a ten-year State Programme backing it, the draft legislation has still not been passed. In Moldova the debates about the Law on Cinema, eventually passed in 2014, related as much as anything else to language policy and complex identity politics within the country. This had also been the case in the past in Ukraine and continues today in a debate around what constitutes a Ukrainian 'national product' as far as policy and legislation are concerned. In Georgia, current drafting of an update to the legislation related to the cinema and audiovisual sector is indicative of the degree to which legislation is now starting to be triggered and driven there by the sector and its practical needs and not by 'top-down' politicians and declarative politics as was usually the case in the past.

OVERVIEW SWOT[11]

In an overview SWOT analysis of the state of cinema and filmmaking in the Eastern Partnership region, it can be seen that all the countries, to differing degrees, are successfully 'repairing the past' and putting behind them the catastrophic collapse in the post-Soviet period of their cinema and filmmaking industries and infrastructures. They have been doing this in circumstances - political, financial and technical - which are often difficult and complex and they can rightly celebrate what they are achieving and their strengths. The appearance in recent times of their pavilions at Cannes is more than symbolic; it is a sign that collectively they are a new and exciting new force on the international scene. Individually they are all making their mark albeit with some countries, for example Georgia, in certain areas ahead of the game.

Weaknesses not unexpectedly are also part of the mix. The weaknesses could be strategically significant in the future which is why they have been highlighted in this report but hopefully not to an extent that they overshadow success and the unquestionable progress made. The Recommendations for obvious reasons also focus mainly on weaknesses and again this should not be taken out of context.

In terms of opportunities, one could perhaps see them in terms of three categorisations: missed opportunities, current opportunities and future opportunities. It is sometimes not productive to dwell on the past or be wise after the event but on the other hand it is important to learn, especially if there are lessons to be learnt related to repeating or current themes. In this context, the Study found two areas where missed opportunities, had they been explored properly or imaginatively, could have had an impact and produced a different and more positive scenario. Or at least they could have possibly contributed to achieving a little earlier the stage that has now been reached.

The first is that the countries have been relatively slow in recognising the value and importance of co-productions[12] and some years were wasted as a result. In particular, some of the countries

[11] Strengths, Weaknesses, Opportunities and Threats Analysis.

ratified a decade and more ago the European Convention on Cinematographic Co-productions but did not explore its potential benefits for them or use it at all. At the risk of using Georgia too often as an example in this report, that country has recently woken up to the fact that a goose which had the potential to lay golden eggs, the Convention, had been there totally neglected for a decade. Once this was recognised, and because of other recently reformed and modernised aspects of its cinema scene, Georgia has since then been on a springboard to international success[13].

The second area of missed opportunity is slow and still insufficient recognition of the benefits of working together as a region when there are so many common needs. These common needs could have provided the potential for the six countries to develop a strong and shared 'hexagonal bloc' agenda in relation to the development of their national audiovisual sectors. Although there have been relatively small scale cross-border initiatives, usually through film festivals or civil society-led projects, there has been an absence of any large-scale, government-backed, policy-led activity to develop 'win-win' regional goals, alliances and activities to develop the national audiovisual sectors. This is probably more to do with the general prevalence in the countries of the region of a lack of a 'win-win' tradition and an ongoing 'zero-sum game' mentality[14]rather than anything specifically related to the audiovisual environment. Whatever the reason, it is not difficult to imagine various 'what-might-have-been' scenarios such as establishment of a regional film fund which attracted extra-regional and international foundation funding or a regionally-based distribution system or mechanism in the absence of domestic systems.

Of the current opportunities, quite a lot is being made of them. More sharing of experience both regionally, at a European level and internationally, would however certainly lead to wider and more effective use of these opportunities. Co-production opportunities are an obvious area but there are probably other still untapped opportunities, for example related to external, including European, support related to specialised education and training. As noted earlier this is an area where there are weaknesses. Demand for producer training, scriptwriting skills and latest developments for certain 'below-the-line' cinema professionals are common needs in most, if not all, of the six countries.

Experience shows that opportunities are often best exploited by the initiative of individuals but state-dominated environments often get in the way or inhibit individual initiative. Unfortunately the Study found not infrequent examples of this in the region, perhaps happening to a greater degree in some countries than others. The importance of individual initiative is particularly true in the case of international opportunities.

In terms of future opportunities, in the context of the Study, there are two areas which should be mentioned. The first is specific - the EU 'Creative Europe Programme'. The second is very general

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[12] Another important Soviet legacy which in general needs more exploration and understanding in the context of the region.

[13] It should be noted that it is not only the Convention on Cinematographic Co-productions which is an example of the countries of the region failing to understand or not being sufficiently helped to understand the purposes and values and how to make proper use of European and international conventions. Other examples related to the cultural sector are the diversity conventions, the Hague Convention and so on.

[14] Another important Soviet legacy which in general needs more exploration and understanding in the context of the region.

and relates to the digitalisation and related ‘revolutions’ and rapid developments taking place internationally in the wider audiovisual industry.

In terms of ‘Creative Europe’, Moldova and Georgia have already joined. Ukraine, after a confused false start, is expected to join imminently i.e. over the next few months once some remaining detail has been settled. The opportunities offered by ‘Creative Europe’ for the region, even in cases where there is not full access, are potentially exciting both through the Media and Culture sub-programmes. There are however caveats. Exactly how it will work in the initial period is still beset with information gaps, certainly amongst professionals and practitioners in the region. These information gaps need to be addressed. Secondly, there is a possibly that in the region there is an underestimation of what is required in terms of the application process and sometimes this is combined with a view of it as a ‘lottery’ rather than a hard-fought competition. Thirdly, the number of organisations in the region that have the required legal status, financial experience (including being able to find or attract the local financial contribution that has to be found) and connections to make or attract serious multinational partnerships is going to be limited initially.

In terms of the opportunities offered by the digitalisation revolution and other developments in the audiovisual world, the Study found ambiguities and contradictions which make future predictions uncertain. On the one hand the region has impressive technical and IT manpower and at this level there is no question that the countries can compete internationally. The question is whether their professionals, for example, young Ukrainians, Armenians and Belarusians, will be developing their own countries’ audiovisual, cultural and creative industries or be working instead in Los Angeles, London, Berlin or Moscow.

At a state or governmental structural level, the relevant authorities (and who the relevant authorities are is often unclear) struggle, as do their counterparts in Brussels and in the individual EU Member States, to try to understand and keep up with what is happening in the digital and audiovisual worlds. It is an area where EU resources, knowledge and experience, however hard the EU itself finds it trying to keep up with developments, nevertheless has so much to offer the countries of the region. The countries of the region at times do not seem yet to be on the starting blocks in terms of many of the current and future digital and technologically-driven challenges. In Europe we are used to legislation needing to chase and try to keep up with reality in this new digital, content-producing world. In the Eastern Partnership region, however, if it takes some countries five years to produce a local Law on Cinema, it needs little imagination to anticipate the problems, some already existing, if they are going to be on their own dealing with the ramifications of the audiovisual digitalisation and content revolution. At best, at present capacity, they will be able to join conventions and international agreements to address such situations.

Administratively and sometimes in policy terms it is not always evident that the countries are facing in the right direction concerning where the audiovisual sector is going. Mention was made in passing earlier both about clarity as to who the relevant authorities are. Reference was also made as to how national audiovisual policies have been focussed primarily on cinema and been oriented to ‘repairing the past’. Audiovisual policy in the region is often perceived narrowly as either cinema policy or cinema and TV broadcasting policy with scant attention paid to new areas such as the emerging games industry, an already major music video/clip industry (not culture because it is not a responsibility of the Ministries of Culture?) and so on.

At the beginning of this report attention was drawn to the serious limitations of current capacities in the countries of the region to gather useable statistical and informational data for policy purposes even related to cinema. In the newer audiovisual areas there is little or no available monitoring or other information. There is no audiovisual product register which allows any sense of quantification in the new areas yet successful computer game products, for example, are certainly being created in the countries of the region.

Outside of cinema and filmmaking, the rest of the audiovisual world is largely uncharted by the authorities because it is being led by private entrepreneurs and commercial companies working in a fragmented fashion. Unlike in most EU Member States, professional membership organisations are not a tradition and in the main do not exist, so obtaining information and statistics or any kind of overview is not possible through that channel. For the governments of the region, again unlike most EU Member State governments, they are handicapped by the fact that the role of the authorities is often simply to control and sometimes to exploit private and commercial sector activity. This is done, for example, through an unhelpful attitude to company and 'sole trader' registration, punitive taxation and auditing regimes and, not rarely, open or hidden petty corruption. In such circumstances private entrepreneurs and commercial companies in true Pavlovian fashion keep contact with the authorities to a minimum and certainly are not naturally inclined to share information. The support, partnership and benefits that many EU Member State governments offer to their private and commercial employment and wealth creators, which have usually been developed consultatively with professional membership associations representing those private entrepreneur and commercial interests, simply do not yet exist in the region.

RECOMMENDATIONS

1. This issue, lack of a solid, available and useable factual and statistical 'toolbox' which can be used for practical policy and management purposes, has been discussed during the course of the Study with several current and past ministers and deputy ministers in the region all of whom have formally or informally confirmed that it is a serious problem. It is an area where EU assistance could be offered if requested. This could be through the EU-EaP Culture Programme, the EU TAIEX and Twinning Programmes, the targeted workshops/conferences organised by EEAS/DG Education and Culture and through extension of any existing arrangements with Eurostat. It is an area in which UNESCO should also be encouraged to be more active in the region.

2. All national authorities in the EU and the region are struggling to keep up with the legal and practical ramifications of the digital revolution, the 'Internet of everything' and the move from traditional production models to multi-use 'content production'. To a degree to which the countries of the region find it useful, any EU or EU Member State cooperation in the area of regulation, legislation or training related to new developments in the audiovisual sector should be encouraged. Obviously some activity is already happening but a more planned, comprehensive and strategic approach would be helpful.

3. The 'climate' or context for culture, in particular for the audiovisual sector, is often not helpful in the Eastern Partnership countries and is generally not yet the main strategic focus of Ministries of Culture. It would be useful if thorough the HiQSTEP Programme or a similar mechanism a study could be made in cooperation with the countries to focus on tax and regulation issues related to the audiovisual sector and non-culturally-specific legislation. Such a study should look in detail at 'own goal' problems (such as the problem of Tax Codes not distinguishing between 'grants', 'investment' and 'income') and the whole area of lack of incentivisation measures. In particular the study should look at the extent to which various good European incentivisation practices and experiences could be of practical relevant to the countries of the region.

4. In the past there has been a missed opportunity for creation of a ‘win-win’ regional relationship focussed on development of the audiovisual sectors. The value of closer cooperation of the Eastern Partnership countries is self-evident because of the similarity of their needs and of their Soviet-era legacies. For example, Moldova is in the process of setting up its first National Film Centre while Georgia has very successfully developed a successful model in the creation and in particular in the recent development of its own National Film Centre. Consideration should be given to development of an annual or biannual clearly-focussed and issue-based gathering of relevant policy-makers and specialists from the region perhaps with carefully selected specialists from Europe also participating. This could be under the aegis of the EU-EaP Culture Programme if the Eastern Partnership countries think such a gathering could be useful and value-adding and that Programme is an appropriate context.

The Country Studies: Statistical and Data Issues

In all the countries of the Eastern Partnership region there is a general problem with statistical and similar empirical information related to the cultural sector. The systems for collecting various types of cultural sector ‘hard’ data either do not exist or are weak or inconsistent. During this Study formal and informal discussions with present and former ministers and deputy ministers of culture, as well as with others, made it abundantly clear that provision of the type of information needed in a complex modern world for strategic management and evidence-based policy development is severely limited.

The background to this problem is that the old system of collection of statistical data inherited from Soviet times is no longer appropriate for modern management and policy purposes but in those countries where it has been abandoned it has not been replaced by any consistent, robust systems. In those countries where the old system at least in part still operates, data collection is sometimes mechanistic and somewhat detached from everyday realities. Where apparently sound data or statistics exist they are often only part of the picture. For example, while the number of screens in a country is known, it is quite possible that there are no comprehensive cinema visitor statistics.

Sometimes statistical information may look as though it is comprehensive but in fact it is partial and therefore deceptive. Most available statistical information in the Eastern Partnership countries is collected by a section of a Ministry of Culture or by an institute working directly under its aegis or by a specialised body such as a film commission or national film centre. The data collected normally relates however only to organisations and activities directly funded or administered by the Ministry or those that receive funding from the state. Cultural organisations and activities which are in the commercial sector or are related to NGOs and private entrepreneurs and even those which are administered by another ministry (e.g. the Ministry of Education or the Ministry of Youth) are usually not included.

There are other anomalies too. For example, in some countries there are quite big ‘Unions of Cinematographers’ which, although they still wield some influence, often have very few among their membership who are actually actively involved in filmmaking. Similarly even official annual statistics related to the number of films produced in a country can be misleading as it may refer only to those made in state studios or those that have received a state subsidy. Such statistics usually ignore what is produced by independent studios. The emergence of commercial cinemas and multiplexes also represents a problem as they often treat their box office and audience figures as commercially confidential information and do not make it available.

Finally even what would seem to be the very simple statistical area of co-production is complex. In some countries there are ‘official’ and ‘unofficial’ co-productions. An ‘official’ co-production is one that involves a state certified ‘national’ film working through formal and official co-production administrative and financial channels. An ‘unofficial co-production’ is one where the film is not a state certified ‘national’ film or where it has not been the subject of an official application for funding. Unofficial co-productions often are ignored in official statistics about co-production activity but can in fact be more numerous than ‘official’ co-production. A further complication is that in some countries the legislative and administrative basis has not been in place to define and identify a state certified ‘national’ film so in countries such as Armenia and Moldova all co-productions, even those receiving state funding support are technically ‘unofficial’ co-productions.

It was disappointing that in the case of Azerbaijan a statistical snapshot was not able to be included in this report because information was not made available by the relevant Azerbaijani authorities notwithstanding official requests being made. It was decided not to hold up the publishing of the Report while waiting for the information requested.

ARMENIA COUNTRY SITUATION

Background

The main institutions shaping Armenian cinema and filmmaking include the National Cinema Centre of Armenia which was established in 2006, the Hayk State News and Documentary Film Studio and the Robert Sahakyants Animation Studio, all three of which are official state institutions funded by the Ministry of Culture. Other key players include the well-established Golden Apricot International Film Festival and over twenty independent production companies.

Like other countries in the region, Armenia is working to 'repair the past'; in other word trying to re-establish the fairly solid cinema and filmmaking infrastructure it had in Soviet times. The main feature of Armenian cinema in the post-Soviet period was the almost total disappearance of all cinemas in the country which of course then had dire ramifications for film production and film distribution. Until very recently Armenia had in reality only one cinema, the Moskva, which is in the capital Yerevan. There has been an amelioration of the situation regarding exhibition/screening in the last two to three years with the opening of a multiplex in Yerevan and other new screens.

Against this background of almost no screening facilities the role of the Golden Apricot Film Festival should be acknowledged. Apart from it being an impressive feat to establish a film festival with an international reputation, the festival has been the face of Armenian cinema internationally. Both through the festival itself and through including through the Golden Apricot Fund for Cinema Development, its staff have been working on an impressive array of projects over many years especially focusing on cross-border cooperation. These projects have included a major EU-funded 'Directors Across Borders' project which brought together partners from Georgia, Ukraine, Turkey and Italy and one component of which was imaginative and courageous co-operation with Turkish filmmakers and the creation of the Armenia-Turkey Cinema Platform.

Armenian cinema has to some extent suffered from the absence of any specific legislative base. Drafting of a cinema law started in the 1990s and the process has still not been completed although in the last three years and in particular in recent months a greater sense of urgency seems to have emerged with a ratified Law on State Support for Cinema expected during this year. It should open the way to the possibility of 'official' co-productions through use of the European Convention on Cinematographic Co-productions, some tax incentive mechanisms and in general provide a more stable framework within which Armenian cinema and filmmaking can develop. Armenia is also joining Eurimages and if everything happens as it seems to be planned, from 2016 new opportunities should be opening up.

Challenges and Issues

Among the challenges and issues currently facing Armenian cinema and its film industry are:

- the absence of an up-to-date legislative framework for cinema and the audiovisual sector notwithstanding much discussion and drafting in recent years relating to a proposed Law on Cinema
- the whole audiovisual chain, including both the cinema and television sectors, are in need of modernisation, starting from funding and production through to distribution and exhibition

- there are direct and indirect film education and training issues which are interconnected. these include a lack of modern technical equipment in the institutions teaching filmmaking which in turn means that in general there is limited up-to-date filmmaking capacity and a lack of well-trained 'below-the-line' technical professionals. Improved skills training is needed in areas such as scriptwriting
- notwithstanding Armenia's international networking through its active diaspora, best advantage is sometimes not taken of international cooperation and related opportunities. Extremely good work has been done through programmes and projects under the aegis of the Golden Apricot International Festival but on the other hand Armenia ratified the European Convention on Cinematographic Co-productions in but has never used it. Similarly its relationship to Eurimages is ambiguous and it is not yet clear how it will be exploiting the possibilities membership provides.

Azerbaijan Country Situation

Background

The making of a film in Azerbaijan in 1898, just three years after the Lumière brothers, is now part of Azerbaijan's post-independence, developing national cultural identity. Azerbaijan's success in producing good films at certain times during the Soviet period reinforces a perception of cinema and the audiovisual sector as being an inherited part of the country's cultural future.

Since 2000 there has been a systematic investment of oil and gas revenues into culture and cultural diplomacy in a 'top-down' but pragmatic strategy which even some 'bottom-up' critics recognise has had its successes.

Current developments related to cinema and the audiovisual sector in Azerbaijan were set in motion by a 2007 Presidential Decree which signalled that addressing the post-Soviet problems and future development of Azerbaijani cinema were to become a state priority. In 2008, the 'State Programme for Development of Azerbaijani Cinema, 2008-2018' was adopted and set out the strategy and goals.

The main objectives of the 'State Programme for Development of Azerbaijani Cinema, 2008-2018'

has set out to strengthen the material and technical base of cinema including:

- the creation of a modern production base
- supporting films which have serious creative and cinematographic value
- restoration of the distribution and exhibition infrastructures
- preservation of a modernised state cinema network combined with privatisation of other cinema venues
- promotion of national films internationally and development of links with foreign distribution companies
- training of film professionals
- dubbing of films in the Azeri language
- greater attention to anti-piracy measures
- restoration and preservation
- digitalisation of national and other films
- the State Film Archive as the depository for copies of all film material
- study and promotion of film heritage
- education and training
- international cinema cooperation including co-production activity.

The 'State Programme' also encompassed the TV industry. One of the main developments was the controversial banning in 2012 of the screening of all foreign television serials/soaps on the eleven Azerbaijani TV channels. The ban included Turkish serials/soaps which are particularly popular in Azerbaijan. Officially the move was to stimulate and strengthen domestic TV production in this area although there also seemed to be a link to state 'protection of public morals'. In practice what happened was that those who could afford it switched to cable TV and continued to watch the foreign product. It is too early to say whether the banning of foreign serials/soaps has been successful in terms of creating a competitive capacity to produce appealing domestic serials/soaps.

The 'State Programme's' investment can however be perceived as already producing results in terms of a younger generation of directors and producers which is emerging. They include people such as Ilgar Safat, Ilgar Najaf and Shamil Aliyev.

Important factors related to Azerbaijan's film industry include:

- commissioning of films is coming overwhelmingly from the Ministry of Culture and Tourism and other state bodies
- costs in Azerbaijan are high which discourages investment by non-state players
- unlike in other post-Soviet states, in 1990-1995 when there was no state funding for production, in Azerbaijan an impressive number of privately-financed films were produced
- there are six state film studios of which the major one is Azerbaijan-Film. They produce about 4-6 feature films each year, about twenty documentaries plus animation and short films
- independent production companies have emerged including about a dozen serious ones. In recent times they became eligible for state funding and one of them, Nariman Film, was at one point thought to be receiving about 70% of its funding from state sources.

The 'State Programme' has been used to stimulate a number of initiatives. This includes greater international engagement related to cinema and film, notably an application to join Eurimages and the establishment of an Azerbaijan pavilion at Cannes, part of a wider initiative actively to promote Azerbaijani filmmaking internationally. In addition priority is being given at state level to international co-production activity with partners so far having included the Russian Federation, Germany, Georgia, Turkey and Spain.

One project worth noting is the AzCinemaOnline Internet Cinema[15] which is promoting Azerbaijan cinema both domestically and internationally and has an impressive list of features, shorts and documentaries. The project has been led by the company Narimanfilm with support from the Ministry of Culture and Tourism and the Union of Cinematographers plus some private sponsorship.

Challenges and Issues

Among the challenges and issues currently facing Azerbaijan cinema and its film industry are:

- commissioning of films is coming overwhelmingly from the Ministry of Culture and Tourism and other state bodies, often in the form of old Soviet-style 'state orders'. This is probably having a distorting effect both in terms of diversity of content but also in terms of Azerbaijani filmmakers being less ready for competitive or commercial markets
- there is a policy of attracting foreign filmmakers to use Azerbaijan as a location for shooting films and there is an Azerbaijan Film Commission, one of whose main functions is to encourage this. While the country's natural diversity - it has a surprisingly wide range of climatic zones - make it an interesting shooting location, it is a high-cost country and this does not make it naturally attractive for producers
- not unique in this respect, Azerbaijan ratified the European Convention on Cinematographic Co-productions in 1999 but has been slow to use it. In the first two decades of independence a lot of

[15] www.azcinemaonline.az

the countries in the region mechanistically signed up for conventions often not appreciating the potential practical benefits of them. This particular convention was a good example of that and in many respects a missed opportunity

- audience development for serious cinema, as in all the countries, is important especially for the 'lost' younger generation who now consume films in non-traditional ways
- the political environment in Azerbaijan is authoritarian and based on a 'top-down' model. While there are good examples, particularly in Asia (e.g. Singapore, South Korea, Taiwan, Hong Kong etc), where this has produced strong national cultural sectors which came to be able to compete internationally, the circumstances in Azerbaijan may be different. Younger filmmakers and cinema professionals may be tempted to leave for more conducive creative environments if domestic controls and procedures inhibit their ability to fulfil their full potential.

As mentioned earlier in this Report, unfortunately the necessary information to produce a statistical snapshot was not made available by the relevant Azerbaijani authorities although official requests were made. Therefore the statistical snapshot is not included in the report.

BELARUS COUNTRY SITUATION

Background

While all the Eastern Partnership countries have Soviet era legacies in relation to their audiovisual sectors in Belarus Soviet-style structures and practices have either survived or been actively reinvented. Everything is basically state-run and there are, for example, no private cinemas. The main legislation regulating cinema and filmmaking is the 2004 Law on Cinema which was given some amendments in 2012 which specifically opened up more possibilities for international cooperation and co-productions and followed a 2011 Presidential decree on cinema which also signalled a change of approach in some areas

The continuation of Soviet era models and practices is not to say that there is no change. Impressive investment is being put into upgrading of facilities and capacities at Belarusfilm, the national state studio, and since 2012 a film production open competition has been operating.

The Belarusian situation however is unique in other ways than just in its preservation of Soviet-style structures and practices because of the relationship with Russian Federation interests. Both production and distribution in Belarus are dominated and effectively determined by its neighbour. In terms of distribution nearly all films shown in Belarus, including American and European films, are purchased and supplied from the Russian Federation and shown in Russian. In terms of production the country's film industry is in many respects a service industry for the Russian market. Much of Belarusfilm's activity is servicing Russian production companies and in this respect there may be a link to the upgrading of Belarusfilm's facilities. Belarusian TV production also takes Russian commissions while there are private Belarusian commercial production companies, allegedly with state funding, also providing services to Russian companies where the product is shown in the Russian Federation and later comes back to Belarus as if it is a Russian import.

There is no tradition of a Belarusian national cinema and indeed there appears to be little domestic interest in local product which further deepens the situation in which the Belarusian film industry is producing for others. Some critics argue that even the state's increasing interest in international co-productions is more about being a service industry than being a genuine partner. That said there does seem to be some change in the approach to at least some co-production projects especially prestigious ones involving European partners where Belarus has supplied a modest contribution to funding and not just services which was the model in the past. Being associated with a successful European product of course also has political benefits given the country's problematic image. It should be noted that Belarus is not a signatory to the European Convention on Cinematographic Co-productions.

Challenges and Issues

Among the challenges and issues currently facing Belarusian cinema and its film industry are:

- a complex and confused environment in terms of direction, policy control, ownership and management in a context in which there has been a lack of any strong tradition of a specifically Belarusian 'national' cinema movement
- an undeveloped and limited local market for audiovisual production coupled with dominance in the home market of imports of Russian-language product from the Russian Federation (some of which in fact is actually produced in Belarus by Russian companies for the Russian market and then 'exported')
- while state control and management of the cultural sector in general is fairly comprehensive, in the audiovisual sector in many respects there is a low-level of government control and management. In reality the main players are Russian private businesses and other Russian audiovisual interested parties using Belarus as a de facto Russian Federation provincial production base and service industry
- while Belarusian film industry skilled manpower and production facilities are in demand, there are also areas of weakness including an apparent paucity of directors, producers and scriptwriters
- the fact of not having a strong 'national' cinema tradition, weaknesses in other than 'below-the-line' film education and training and the absence of a National Cinema Centre or similar institution inhibit the strategic direction and growth of the Belarusian audiovisual industry
- a lot of trained and creative Belarusians from the audiovisual sector choose to move to the Russian Federation or Europe because of dissatisfaction with their domestic environment and greater opportunities elsewhere.

Georgia Country Situation

Description of the Audiovisual Sector

There have been quite rapid changes in Georgia in recent years in terms of its economic development and business climate. This has also been reflected in the audiovisual sector. In particular cinema and the film industry have seen the beginnings of a renaissance after the catastrophic collapse of the 1990s which affected all the countries of the Eastern Partnership region. The ramifications of that collapse continued until relatively recently. Cinema and filmmaking, being an industry and business as well as an art form, are benefiting from the improvement in the business climate as has the music industry.

The impact of wider reform and modernisation in Georgia in the last few years has begun to be seen in the cultural sector but it is in the cinema and film sector where there have been the most noticeable and successful changes. There is a confident younger generation of Georgians working in the audiovisual sector who are having an impact internationally and in general one can expect the audiovisual sector in the country to grow and strengthen in the coming years.

The major gap at present is that national cultural policy (as in the other Eastern Partnership countries) has tended to focus almost exclusively on state cultural organisations, institutions and practices and ignore the private or commercial cultural sector. By its very nature development in the audiovisual sector and cultural and creative industries is mainly being driven by non-state independent, private and commercial organisations and entrepreneurs who are working on their own and in general without there being any government support or practical interest. It will be interesting to see whether the new Georgian Cultural Strategy which is currently being developed and which should appear in the first quarter of next year will address this situation given that support for cultural and creative industries was already a stated Ministry of Culture priority.

The Role of the Audiovisual Sector in National Policies

In the past Georgia's strong cinema and music traditions achieved international recognition. In Soviet times Georgian films were popular with Soviet audiences but also several films were successful in Europe. It should be remembered that in terms of production, after the Russian Federation and Ukraine, Georgia was the most active filmmaking Soviet republic producing 20-25 feature films each year. That output dwindled to virtually nothing in the immediate post-independence period and for almost twenty years cinema and filmmaking were in a very bleak situation much to the sorrow and shame of Georgians who had been so proud of their national cinema. In Soviet times Georgia also had some of the best cinema attendance figures.

As with some of the other Eastern Partnership countries the collapse of the cinema infrastructure and film production created anomalies such as what to do with the big state studios and their obsolete equipment. The leading institution in Georgian cinema had been and remained the film studio Gruzia-Film (Kartuli Pilmi) where 90% of the production capacities and technical staff were concentrated. During its history over 800 feature films, shorts and TV films, 600 documentaries and 300 animations were made there. A decision was at one point taken to privatise it but the privatisation process was poorly managed and did not bring in the expected investment making the situation perhaps even worse than before. Today two thirds of the shares in Grazia-Film are held by the state.

This dismal situation concerning cinema and filmmaking began to change about five years ago. Led by the Georgian National Film Centre (GNFC) there have since then been very positive developments which have produced a new creative climate in the country and facilitated strong international links, particularly in the area of co-productions. The Georgian National Film Centre was originally set up in 2001 and followed the model of the French CNC. It is a de jure state organisation under the Ministry of Culture and Monuments but in recent years it has been operating in a very professional way fairly independently and in the main at arm's-length from government even though it is the main state funding agency for all film. Apart from funding through the Georgian National Film Centre there is also a small separate film production fund in the Autonomous Republic of Adjara.

Although Georgia signed the European Convention on Cinematographic Co-production in 2001, with it being ratified in the following year, as with other countries in the region it did not make use of it. This changed in 2010 when the Georgian National Film Centre introduced a National Film Certificate procedure, which is a requirement under the Convention, and actively started to promote the Convention. In the following year Georgia joined Eurimages and in combination with the use of the Convention this led to significant activity related to co-productions. In general it stimulated the sector especially as Georgia was very successful in drawing on Eurimages funding and several of the films made have been critically acclaimed internationally, winning awards at various festivals. This has restored the prestige of Georgian cinema and produced a new young generation of cinema professionals.

This success has also encouraged the Georgian National Film Centre to move imaginatively into areas such as audience development. They are for example responsible for a very interesting and extensive programme of taking film into schools as an extra-curricular activity which has been popular and met with a lot of success. They have also in the past years imaginatively developed their own systems to demonstrate transparency in terms of funding decisions for example and can justifiably be recognised as a model of good practice.

Current Developments and Issues

Georgia is the first Eastern Partnership country to become a member of the EU 'Creative Europe Programme'. Although this happened only very recently this year they have already set up two Creative Europe Desks, for the culture and MEDIA sub-programmes respectively, with the Georgian National Film Centre being responsible for the latter.

The positive climate for cinema and filmmaking has stimulated interest in Georgia as a shooting location. The Georgian National Film Centre had earlier produced an electronic guide for film producers presenting Georgia as a 'film friendly' country. It provides information about locations and information on film organisations, funds, educational institutions, film festivals, TV companies, movie theatres and film studios and a brief review of Georgian film history. Tbilisi Municipality is currently developing a programme to turn Tbilisi into a 'film-friendly' city recognising the benefits of being a location in terms of tourism as well as the immediate and direct economic benefits.

While Georgian cinema and the example set by the Georgian National Film Centre represent a success story, there are still problems areas, in particular a paucity of screens, absence of a distribution system and ongoing problems with the former state studio Kartuli Pilmi.

Legislative Situation

The legislative base for cinema and filmmaking is the Law on State Support of Cinema passed in 2000 and which amongst other things made provision for the establishment of the Georgian National Film Centre. There have been subsequent amendments to it and some further new changes are currently being drafted. In its current form it defines the legal mechanisms for state support for cinema, establishes the status of a national film, provides the legislative base for financing production and distribution and the role of official institutions/organisations operating in the film sector. With the Laws on Culture and on Protection of Copyright and Related Rights it provides the legal context for activity in the sector.

The European Convention on Cinematographic Co-productions is the other major piece of legislation specifically related to cinema and as mentioned above has been actively used in the last five years.

Conclusion: Challenges and Perspectives

Among the challenges and issues currently facing Georgian cinema and its film industry are:

- The Georgian National Film Centre has been successful in recent years in supporting film industry growth and Georgia's international visibility but its production funding capabilities are limited making the production support contests it organises fiercely, and perhaps too extremely, competitive. Each production contest (e.g. documentary feature support, first time director feature support, regular feature support, animated short support etc.) is only conducted once per year and sometimes receives 30-40 applications with only two of the projects being awarded production support. Supplementary funding could perhaps be explored by a dedicated contribution from the national lottery or by direct funding from the state budget
- Georgia has been successful in transforming its Soviet era legislation and tax system into a modern business-friendly system (usually ranked among the world's top ten countries by the Ease of Doing Business index of the Word Bank). Nevertheless the tax code and legislation are not the most helpful for film development, production, local and international distribution, local and international co-productions, local and international service productions. The VAT application rules are a particular issue so is the absence of sufficient tax incentives which makes the Georgian production environment less competitive compared to countries that have such incentives.
- This general area is one where detailed international technical advice (e.g. from the EU) could be useful
- Georgia currently does not meet the requirements of the European Audiovisual Media Services Directive (AVMSD) and this negatively impacts on support for local productions, issues relating to the protection of minors etc. It also prevents Georgia from enjoying, for example, full membership of the MEDIA strand of Creative Europe. Again Georgia could possibly tackle this issue with EU technical assistance legislative changes.

- Georgia is among those countries with a high piracy rate which is inappropriate given the progress it has made in so many other areas.
- Georgia's success needs to be seen in perspective. In 1980 Georgia had 20 million annual admissions (for a population of 4.5m) at present with a limited but growing number of screens, a high piracy rate and lack of international distribution presence, admissions are between 600,000 and 900,000, a pattern common to other Eastern Partnership countries.
- There are no working systems for box office reporting and cinema sector and audiovisual industry research.
- There is no distribution system operating in Georgia which impacts negatively directly and indirectly on cinema development
- Compared with its ambitions and future needs specialised audiovisual education and training is currently inadequate and this problem needs to be addressed if Georgia is to sustain the success it has built up
- The Georgian National Film Centre in recent years is a very positive example of the type of professionally-driven cultural sector organisation so much needed in all the countries of the region. It specifically offers a in the cinema sector a model that could be adapted in certain other countries. For example, its experience might be extremely helpful to Moldova which is in the process of setting up its own national film centre.

MOLDOVA COUNTRY SITUATION

Background

The audiovisual sector, in particular Moldovan cinema, has a more recent and more modest pedigree than some of the other countries in the region but at the current time there are potentially interesting new developments which are emerging. These developments are being activated by Moldova's signing of the EU Association Agreement with the implications and requirements that flow from that, the country becoming the second (after Georgia) Eastern Partnership country to join the EU 'Creative Europe Programme' and in particular by new legislation, the July 2014 Law on Cinema.

The passing of the new Law on Cinema was particularly important as at one point it looked as though it was going to be an example of cultural legislation in the region being discussed and debated for years without outcome. The Law on Cinema was really needed to set a practical as well as a legislative framework for a new stage of cinema and filmmaking in the country. In particular it made provision for the setting up of a National Film Centre which when established will be able to provide a professional focal point and push forward an agenda for addressing some of the things that have been missing hitherto which have inhibited healthy growth.

One important weakness hitherto has been the absence of a legislative base for defining a Moldovan 'national' film which is a requirement for 'official' international co-productions. Moldova joined the European Convention on Cinematographic Co-productions in 2011 but has not been able to make use of it because of that. Although quite a lot of cooperation has been going on with Romania in the audiovisual area, apart from that Moldova has not been particularly active in terms of co-production activity. One can expect this situation to begin to change over the next two or three years.

Moldova, like the other Eastern Partnership countries, has been burdened by a number of Soviet era legacies which have acted as barriers to modernisation. The Employment Register did not recognise the profession of producer and the state while on the one hand not able to provide serious funding to the audiovisual sector still instead on holding the rights to films to which it had provided funding instead of them belonging to the producer and creators. As in other countries there was an anachronistic 'Union of Cinematographers'. It has become an NGO and in recent times has attempted to rejuvenate itself under new leadership by attracting younger members. Being a predominantly rural country, the question of how to reinvent and re-equip the extensive national network of Soviet 'Culture Houses' has been another legacy issue.

As in other countries problems of film distribution and piracy, the two sometimes interconnected, is something that needs to be tackled. The question of distribution is also not unconnected with national language policy as much of what is shown on screens in Moldova is in Russian and has been distributed by Russian companies.

Challenges and Issues

Among the challenges and issues currently facing Moldovan cinema and its film industry are:

- putting the provisions of the 2014 Law on Cinema into practice and using the opportunities it offers to establish new, healthy directions for Moldovan cinema and filmmaking
- successfully setting up the new National Film Centre and perhaps using the Georgian 'model' and experience as a starting point
- learning how to use the opportunities offered by 'Creative Europe' membership which to some extent will be determined by the successful setting up of an effective 'Creative Europe Desk'
- development of increased co-production initiatives and opportunities
- reviewing and addressing audiovisual and cinema sector training and skills needs and identifying the necessary capacity building mechanisms and resources to provide what is needed
- developing the commercial and industry aspects of Moldovan cinema which has traditionally been perceived as mainly 'subsidised art'
- achieving growth and increased employment opportunities in the audiovisual and cinema sectors especially for younger people in order to avoid a brain-drain and haemorrhaging of skills to Romania and elsewhere.

UKRAINE COUNTRY SITUATION

Description of the Audiovisual Sector

In the last three years an annual Kyiv Media Week, which focuses on content production, has been organised which has grown in size and importance. Under this umbrella there have also been two Kyiv Co-production Meetings, an international platform for presenting television co-production opportunities with the third edition planned for September 2015.

The Role of the Audiovisual Sector in National Policies

Cultural policy in Ukraine is in a great state of flux at the present time with often quite divergent views amongst those professionally involved. The outlines of a proposed new government Cultural Strategy have been published in the context of the main priorities for 2015 set by the Cabinet of Ministers' Action Programme and the Coalition Agreement. This focus on a new approach to culture is in large measure a response to the Crimean and eastern Ukraine events with the question of access to 'national cultural values' - particularly by people caught up in the armed conflict, young people and those living in rural or remote areas - being of central importance. The Cabinet of Ministers' Action Programme and the Coalition Agreement have specifically tasked the Ministry of Culture to:

- operate in line with European principles and practices;
- to formulate and implement, together with other ministries and experts, the Ukrainian Humanitarian (Socio-Cultural) Strategy for 2025 providing cross-sector cooperation in economic and humanitarian spheres through harmonisation with other national level strategies and programme documents;
- to develop a draft law on 'National Cultural Product' taking into account creation, distribution and consumption of 'national cultural product' and to promote the Ukrainian national cultural product in the European and international cultural space;
- to explore and attract new funding sources for culture

It also sets directions for modernisation of libraries (with special attention to remote and rural areas) and museums and a state language policy guaranteeing the use of all languages in everyday life and at the same time promoting the use of Ukrainian as the single state language in all spheres of public life. The language policy aims to protect the right of Ukrainian citizens to access education, culture and services in Ukrainian but to stimulate at the same time foreign language learning, especially the languages of the European Union. The definition of 'National Cultural Product' and its ramifications will undoubtedly have a significant direct and indirect impact on the audiovisual sector.

As in other countries of the region, cinema is a major priority of national cultural policy, but also like the other countries the state finds it impossible to fund the sector to the degree that is in reality needed. This is particularly true at the present time against a background of war and serious economic deterioration. The interest in cinema is of course related to national identity and in the Ukrainian context this has meant that cinema has often been part of ‘language politics’, and wider issues about the use of Ukrainian.

In 2010 the Ukrainian State Film Agency was set up under the Ministry of Culture to monitor and develop the cinema sector and film industry and to allocate the state budget for the sector. Since 2011 cinema has been stipulated as a priority of state social policy through the Law on Culture and the Law on Cinema. The conditions for the cinema and filmmaking sector in Ukraine have as a result have, until very recently, improved including in terms of funding and introduction of more helpful rules through a new Tax Code of Ukraine for the National Film Industry including production and exhibition. This year’s state budget however has seen a significant drop in cinema funding as a result of the war situation.

Current Developments and Issues

As mentioned above an outline draft National Cultural Strategy has recently been produced and been made public as a consultation document and the main priorities for the Ministry of Culture for 2015 have been set by the Cabinet of Ministers' Action Programme and the Coalition Agreement in a context of national crisis created by the war situation. In addition other special measures are being taken, for example, films from the Russian Federation Russian produced after 1 January 2014 and Russian films produced after 1991 with military content are now banned in Ukraine.

Until the events in Crimea and eastern Ukraine modest positive progress was being seen. For example, in 2013 seven new Ukrainian feature films were shown which was a record number since independence. Four of them had received state support. In that same year twenty feature films were produced of which fourteen were full-length and six shorts. Foreign films however dominate the screens in Ukraine generally representing about 95% of what is shown.

In 2013 Ukraine began the process of becoming a member of Eurimages but for financial reasons did not pursue membership. It is in the process of finalising its joining of the ‘Creative Europe Programme’ after a period of uncertainty. Since the existence of a properly resourced ‘Creative Europe Desk’ is a key to maximise benefits of the Programme it is to be hoped that the Ministry of Culture will be able to allocate the necessary resources for this.

Legislative Situation

There is a 2014 Law on Cinema which provides the legislative base for cinema, filmmaking and the off122icial organisations managing the sector and which replaced the 1998 Law on Cinema.

The European Convention on Cinematographic Co-productions was signed in 1992 but only ratified a decade later in 2012. Following this the Ukrainian State Film Agency was made responsible for the National Film Certificate procedure which is required by the Convention and facilitates ‘official co-productions’. Although not as active as Georgia, Ukraine has slowly begun to use the Convention.

Conclusion: Challenges and Trends

Among the challenges and issues currently facing Ukrainian cinema and its film industry are:

- the crisis situation, especially as it affects state funding, as a result of war in eastern Ukraine and the Russian occupation of Crimea
- how the legislation related to 'National Cultural Product' will impact on the audiovisual sector
- whether new cultural policy will lead to modernisation of the system and in particular embrace in a positive way the interests of the independent, private and commercial cultural actors.

ANNEX 1 - ARMENIA STATISTICAL SNAPSHOT

KEY FACTS AND FIGURES	
Population (201x):	Population (census 2011): 3 019 000
Capital:	Capital: Yerevan
Area:	Area: 29,743 km^2
Median age:	Median age: total: 33.7 years, male: 31.8 years, female: 35.8 years (2014 est.)
Urban population:	Urban population: 1,911,287
Languages:	Languages: Armenian (official)
Religions:	Religions: Christianity (predominant), Yazidism, Islam, Judaism, etc.
Currency:	Currency: Armenian Dram (AMD)
GDP per capita (201x):	GDP (nominal) per capita (2013): 2 812 Euro
Internet users (201x):	Internet users (2013): 46.3% of the population
Authority/ies responsible for media and audio-visual policy and legislation Laws and Regulations in place (summary)	Ministry of Culture of RA National Cinema Centre of Armenia "Armauthor" Author's Rights Protection NGO Armenian Intellectual Property Agency (AIPA) The National Commission on TV and Radio Council of Public TV and Radio Company of Armenia “Television and Radio Broadcasting Network of Armenia" CJSC of The Ministry of Transport and Telecommunications of the Republic of Armenia (established in 1957) The following is a list of laws which contain regulations that affect the audiovisual industry: Law on Fundamentals of Cultural Legislation Law on Copyright and Related Rights Law on TV and Radio Broadcasting Law on Telecommunications Law on Freedom of Information Law on Advertising Law on Export and Import of Cultural Items Law on Import of Goods Law On Protection of Economic Competition Laws related to Intellectual Property include:

	The Law on Trademarks The Law on Geographical Indications The Law on Inventions, Utility Models and Industrial designs The Law on the Legal Protection of Topographies of Integrated Circuits The Law on Copyright and Related Rights The Law on Protection of Economic Competition Customs Code (Section 14) Criminal Code (extract) Civil Code (Section 10) Other international treaties include: Brussels Convention Relating to the Distribution of Programme-Carrying Signals Transmitted by Satellite WIPO WIPO Copyright Treaty WIPO Performances and Phonograms Treaty Protection of Performers, Producers of Phonograms and Broadcasting WTO
Coproduction treaties signed / in negotiation	Armenia has no coproduction treaties signed with other countries. It has signed the cultural cooperation treaties and agreements (see above) and is a member of the Council of Europe Convention on Cinematographic coproduction which is intended to serve as a legal basis for any bilateral or multilateral coproduction activity.
Signed Council of Europe European Convention on co-productions?	Armenia signed the Council of Europe Convention on Cinematographic coproduction in 2000, which after ratification came into force in 2005. Though, Armenia has not yet fully experienced the practical side of the Convention.
Member of Eurimages?	In spring 2014 Armenia submitted an official package of documents along with the country report on the audiovisual sector, in October an official representative participated in the Eurimages Board meeting in Strasbourg and completion of the accession procedure was expected in 2015.
Signed Council of Europe Convention TTT	Not yet. Preliminary examination of the Treaty has been initiated.
DOMESTIC FILM FUNDING	
National/local Public Film Fund(s) (or other public authorities supporting films)	National Cinema Centre of Armenia- public film fund, www.ncca.am

Year of establishment	2006
Annual Budget	Approximately 640 000 Euro (for production, excluding administrative budget)
Number of staff, structure	82 people (including the staff of former “Armenfilm” studio (1923-2006) 24 employees of “Malyan” Theatre (director, 14 actors, artistic director, sound director etc.) 10 employees of technical and cutting personnel 7-9 experts of the Selection Committee 2 employees – animation experts 10 people the servicemen, including driver, cleaning personnel, etc. Active full-time staff in the office, including the management, administrative, secretariat, accounting, editorial, HR, and other departments – 30 employees. Management: Mr. Gevorg Gevorgyan, Director of the NCCA Mr. Vardan Abovyan, Vice-director responsible for the production financing Mr. Albert Mkrtchyan, Artistic Director
Number of film production projects annually supported,	Each year the NCCA supports the following categories: feature films, short films, animation, debut and student films (including documentary), screenplay development, production and post-production. It annually supports production of 5 feature films, at least 3 animation films (2D and 3D), 6 debuts, and an experimental student film. The “Hayk” Newsreel-Documentary Film Studio annually produces 2-3 full-length documentaries and ten shorts. The “Robert Sahakyants Production” Animation Studio and other animation studios mostly produce short animation films totalling to 10 films annually. In 2014 “Anahit” the first full-length animation was produced by the “Robert Sahakyants Production” Animation Studio with the support of NCCA, production lasted three years.
Average budget of films and amount of support	NCCA support is in the form of a grant of up to 100,000 Euro in any given year for a national production and up to 200,000 Euro for an international co-production. There is no repayment (recoupment) requirement. To be eligible for support a feature film needs to have already secured 30% of the total budget i.e. the maximum level of support is 70% except in very exceptional cases when a film is going to be of considerable national cultural value, the film can receive 100%

	support. The average production cost for an Armenian feature film is about 150,000 Euro.
Number of majority and minority co-productions annually supported, average budget of films and amount of support	NCCA supports 1 international (official) co-production in 1-2 years. NCCA's support for international co-productions is capped at 200 thousand Euro. Usually Armenia has a minority participation in international co-productions with the budgets over 1 million Euro.
Number of development projects annually supported, average development budgets and amount of support	Annually NCCA supports 3-4 script development projects.
Number of supported film releases (distribution support), average release budgets and amount of support	NCCA has no special budget envisaged for release, though the it participates in the distribution promotion of the films.
Other support activities (training, cinemas etc.)	The main activity is a month-long "Cinema Autumn" ("Kino-Ashun") event held in autumn. The programme consists of screening new and national heritage films, workshops, conferences, round-table discussions, meetings with directors. One of the contests is for students who screen their films dedicated to the capital city of Yerevan and the best film receives financial award from the Mayor of Yerevan. During these days cinema journalists write reviews and participate in the film criticism contest where the best three nominations get financial award from the NCCA. "KinoAshun" takes place in the capital city, its suburbs, and regions of Armenia. The event venues include cinema theatres, cultural sights, film institutions, schools, art and cultural centres. It always has wide public resonance and participation.
Other/ Private Film Financing Structures (banks, private funds, mecena, etc.)	The NCCA in Armenia is the only major film production fund. Other funding opportunities are possible with the public and private TV companies, media holdings, distribution companies, and independent foundations, among them: The Armenian public TV channel 'H1', H2 TV channel, Shant TV, Armenia TV, Paradise LLC distribution company, Sharm Holding, Golden Apricot Fund for Cinema Development – which provides grants (up to 5 thousand Euro) for film project development and holds annually a unique regional DAB Forum for the prominent audiovisual actors from around the world. Businessmen and enterprises are investing little or nothing into the film production.

The role of TV in film financing	An important development in the film-making industry in Armenia since 2006 has been the investment and direct involvement by the state and private TV companies in film production and post-production activities. Besides TV series, the public and private TV studios altogether produce approximately 5 full-length feature films (usually co-productions with Russia, USA or Georgia). The key advantage of partnership with these companies is that they normally offer better publicity and broadcast films on their TV channels. TV contribution to film production is not mandatory as it is not stipulated by the legislation. Though, the present Armenian draft law on cinema envisages “a participatory framework” of TV sector in the production, release and promotion of national films. There still remains a broad area for negotiation and remodelling of mandatory TV - film production cooperation framework.
The role of new online players (VOD etc) in film financing	None.
THE AUDIOVISUAL MARKET FILM PRODUCTION (For the last five years):	
Total number and list of active production companies	The “core” list of production companies to date: Total number: 40 companies: ***ANNIKO Films*** Maria Saakyan Address: 16 Vardanants Str., Ap. 25, Yerevan, Armenia, 0010 Tel.: +374-55-967450 E-mail: saakyan.maria@gmail.com Web-site: www.annikofilms.am ***Arev Film Studio*** Hrant Vardanyan ArtStep – Studio” LLC Armine Harutyunyan Address: 31 Komitas Ave., Yerevan, Armenia, 0012 Tel.: +374-10-327278 ***“Art Team” NGO*** Narine Babayan Address: 11 Kuznetsov Str., Ap. 40, Yerevan, Armenia “ASK” Cultural Centre Aram Sukiasyan Address: 101 Verin Charbakh, Yerevan, Armenia Tel.: +374-10-514205, +374-99-992500

	“Aysor-Plus” Film Productions Naira Mkrtchyan, Arsen Azatyan Address: 15 Amiryan Str. Ap. 85, Yerevan, Armenia, 0002 Tel/Fax: +374-10-535322 E-mail: aysor-plus@web.am, aysor.plus@gmail.com Web-site: www.theglasstrinket.com ***AZD Production & Advertising*** Hayk Harutyunyan Web-site: www.azd.am ***Bars Media Documentary Film Studio*** Address: 20 Sepuhi Str., Yerevan, Armenia, 0028 Tel.: +374-10-226733, +374-10-226546 Fax: +374-10-226553 E-mail: info@barsmedia.am Web-site: www.barsmedia.am ***Chill Film*** Arman Chilingaryan Address: 4/45 E. Tadevosyan Str., Yerevan, Armenia Tel.: +374-94-281727 ***“Edgar Baghdasaryan Film Production” NGO*** Edgar Baghdasaryan Tel.: +374-55-003732, +374-93-462084 ***“Fish Eye Art” Cultural Foundation*** Jivan Avetisyan, Masis Baghdasaryan Address: 2 Kievyan Str., Yerevan, Armenia, 0028 Tel.: +374-77-316230, +374-93-777222 E-mail: fisheyeart.foundation@gmail.com, masisbag@gmail.com Web-site: www.fisheyeart.org ***Fund after Aghasi Ayvazyan*** Nika Shek (Eugenia Shekoyan) Address: 1 Komitas Ave., Yerevan, Armenia, 0033 Tel.: +37494-905445 E-mail: nikashek@gmail.com **Hay Aspet** Karin Tonoyan Tel.: +374-77-058477 E-mail: karintonoyan@mail.ru, hayaspet_tv@yahoo.com

	The "Hayk" Chronicle-Documentary Film Studio Shushanik Mirzakhanyan Address: 50 Gevorg Chaush Str., Yerevan, Armenia, 0088 Tel.: +374-10-357032, +374-10-354889 E-mail: hayk_fs@yahoo.com Web-site: http://haykdfs.com, www.haykfilmstudio.com ***"HK Productions" LLC*** Hrach Keshishyan Address: 15/2 Marshal Baghramyan Ave., Yerevan, Armenia, 0019 Tel.: +374-55-050025 E-mail: hrach.kesh@gmail.com Web-site: http://hkproductions.com HOSHKEE Film ***Armine Anda*** Address: 6-24 Orbeli Str., Yerevan, Armenia, 0028 Tel.: +374-91-505266 E-mail: hoshkeefilm@gmail.com Web-site: www.hoshkee.webs.com ***HY Pictures*** Hasmik Hovhannisyan Address: 19/1 Rubiniants Str, Ap. 38, Armenia, Yerevan, 0035 Tel.: +374-77-756693 E-mail: hypictures@gmail.com Web-site: www.hypictures.webs.com ***"IFAM" NGO*** Ashot Mkrtchyan Address: 7 Sundukyan Str., Ap. 100, Yerevan, Armenia Tel.: +374-93-272528 ***IKAR Production*** Artak Avdalyan Address: 247 Amarotsain, Nork, Yerevan, Armenia Tel.: +374-93-425580, +374-94-150350 E-mail: aavdalyan@yahoo.com ***"Illusion Production" NGO*** Aram Khatchatrian Address: 2a Odessa, Ap. 4, Yerevan, Armenia Tel.: +374-99-444949 E-mail: arm.aram@yahoo.fr

	KASSart Production Vrej Kassouny Tel.: +374-91-362990 E-mail: kassouny@yahoo.com, contact@kassartproduction.com Web-site: www.kassartproduction.com **Man Pictures** Manvel Saribekyan Address: 5 Adonts Str., Ap. 5, Yerevan, Armenia Tel.: +374-91-012210 ***Manana Films*** Gor Baghdasaryan Address: Mashtots ave 45A, apt 40, Yerevan, Armenia Tel.: +374-91-200116 E-mail: info@mananafilms.com Web-site: www.mananafilms.com ***"Ord Film" LLC*** Hayk Ordyan Address: 13A Khanjyan Str., Yerevan, Armenia Tel.: +374-77-494252, +374-10-396144 ***Paradise LLC*** Samvel Manasaryan, Taguhi Karapetyan Address: 18 Abovyan St., Yerevan, Armenia Tel.: +374-10-523930, +374-10-520479 Web-site: www.paradise.am ***"Panarmenian Geographic Association" NGO*** Ani Vorskanyan Tel.: +374-91-227995, +374-98-019845 E-mail: aneviam@gmail.com ***Parallels Film Production*** Hovhannes Galstyan Address: 43 Pushkin Str., Apt. 2, Yerevan, Armenia, 0002 Tel.: +374-10-635935; +374-91-207284 Fax: 0074-010-580126, E-mail: parallelsfilm@parallelsfilm.com Web-site: http://parallelsfilm.com ***"Piano Group" NGO*** Robert Mkrtchyan

	Address: 13A Khanjyan Str., Yerevan, Armenia “Robert Sahakyants Production” Animation Studio David Sahakyants Tel.: +374-91-956768, +374-10-203474 Web-site: www.sahakyants.com ***RK Film Studio / Kochar Fund*** Narine Lalayan-Kochar Tel.: +374-10-523588 E-mail: kocharfund@hotmail.com ***Sharm Holding*** Address: 18 Vardanants Str., Yerevan, Armenia, 0010 Tel.: +374-10-565557; +374-10-540018 Fax: +374-10-527971 E-mail: info@sharm.am Web-site: www.sharmholding.com ***State Chamber Theatre of Yerevan*** Ara Yernjakyan Address: 58 Mashtotsi Ave., Yerevan, Armenia Tel.: +374-10-566070, +374-91-866070 Web-site: www.erkat.am ***Studio Man Pictures*** Manvel Saribekyan Address: 5/5 Adonc Str., Yerevan, Armenia, 0014 Tel.: +374-91-012210 “***Tao Production” Cultural NGO*** Tatevik Manoukyan Address: 5-21 Halabyan, Yerevan, Armenia Tel.: +374-55-415551 E-mail: productiontao@gmail.com ***“Team” Production NGO*** Mikael Poghosyan Address: 227 Noragyugh, Ap. 4, Yerevan, Armenia Tel.: +374-10-541027, +374-91-427002 ***Triada Studio*** Address: 81 Charents Str., Yerevan, Armenia Tel.: +374-91-407795 E-mail: info@triadastudio.com Web-site: http://triadastudio.com/home.html

	20 YEARS LATER FILMS Jeff Kalousdian Address: 27/25 Nalbandyan Street, Ap. 7, Yerevan, Armenia Tel.: +374-98-852085 E-mail: jkalousd@yahoo.com ***Versus Studio*** Tigran Paskevichyan Address: 1 Charentsi St., 1 Building, Room 104, Yerevan, Armenia, 0025 Tel.: +374-91-330563 ***VS & TIGERS Production*** Sahakanush Sahakyan Address: 57 Zavaryan Str., Yerevan, Armenia Tel.: +374-10-550654 ***Zoom Production*** Hovhannes Hakobyan Address: 19B Khanjyan St., Yerevan, Armenia Tel.: +374-10-541826, +374-91-417827 Web-site: www.zoomproduction.net
Film production volume (cinema)	Since there is no audiovisual register in Armenia it is impossible to get the accurate information. Almost all audiovisual production can be considered as non-official until a relevant law is adopted. However the evident tendency is that domestic productions supported by the NCCA and independent TV sector amount to 50%x50% and this production is released in cinemas whereas the TV-supported productions receive advantage of free release on TV as well. The cinema release production volume totals to 10 full-length feature (among them 1-2 feature-documentary) films. NCCA in principle does support purely documentary films. In 2014 it supported no documentary film, though, for 2015 it will be supporting 3-4 documentary/feature-documentary films (this year is exceptional as it is dedicated to the 100th commemoration of Armenian Genocide). In 2014, NCCA supported 5 feature film, 6 debut films and 3 animations, as well as produced the annual “Gzhuk” shorts series for children. All these productions in their format meet the cinema release requirements.
Average budget Feature/documentary/animation	Feature: 130.000 Euro

/shorts	Documentary: 10-50.000 Euro Animation: 1 minute of animation film costs minimum 5.500 Euro, 3D costs 7.500 Euro. Normally NCCA supports 100% of animation budget. The average length of animation films is 3-15 minutes. Achievement has been the “Anahit” full-length animated film released in 2014 by “Robert Sahakyants Productions” Studio also with the studio’s public funds and NCCA’s support (round 60,000 Euro per year for this 3-year production).
Average financing structure of feature films (public/private – structure of each)	Financing structure of film production 70% public financing (NCCA), 30% private. In exceptional cases, films with strong national cultural value can enjoy 100% public financing. Some documentary or experimental films (both usually shorts) are made with 100% private financing.
Volume of co-productions	The volume of all co-productions in the country (including shorts, experimental, with and without participation of NCCA) is 6-7 films per year. In the years with alternative cultural programs (such as the Armenia-Turkey Cinema Platform, see: www.dabhub.com), the amount of unofficial co-productions increases by additional 2-3 films (including feature, documentary and short films) annually.
Average budget of co-productions	The co-production budget varies from the minimum of 15 thousand Euro (mostly non-official co-productions, docs or shorts), to an average of 300 thousand and over 1 million Euro of official feature film. The recent Ukraine, France, Georgia, Armenia co-production “Parajanov” (2013) had the estimated budget of 1,980,000 Euro; Armenia’s minor participation cost 200 thousand Euro.
Co- producing countries	In terms of film production Armenia has so far co-operated with Russia, France, Switzerland, Germany, The Netherlands, Norway, USA, Lebanon, Qatar, Japan, Poland, Austria, Turkey, Denmark, Georgia, Greece, Lebanon, Kenya, Kyrgyzstan, Iran, Australia, South Africa.
Main production genres	Full-length feature, documentary, animation, and feature-documentary.
Film production volume TV (in-house production) Average budget	Not available
Film production volume TV (com-	The only available information is the Public TV annual budget 42,500 Euro (or 23.4 million AMD)- which includes

missioned production) Average budget Average financing structure	production and all activity. Not available Not available
THEATRICAL DISTRIBUTION (For the last five years):	
Number and names of distribution companies	Major distributor – Paradise Company (a branch of Russian “Paradise” Company) works with “Moscow” cinema in Yerevan and Gyumri (second to the capital city in Armenia). Star Company distributor – also a branch of Russian Star Group of Companies – works with Star Multiplex and provides no box office or admissions statistics. Other distributors include: Team Productions, Fish Eye Productions, Pan Armenian Media Group and other. The tendency in Armenia is that directors and producer register their production company and latter act as distributors promoting their films. Nairi Cinema prefers to work with independent production companies which act as distributors as well, provides statistics.
Number of films distributed by distribution companies?	The Paradise Company distributed total amount of 85 films in “Moskva” (Moscow) Cinema in Yerevan in 2014.
released by foreign distributors:	The titles would be the same for the Star Multiplex (with the focus on foreign productions) and Nairi Cinema (with focus on domestic production)
Volume of films released by national distributors:	There is no national distributor in Armenia. National Cinema Centre assists in distribution which is mainly channelled through the few distribution companies (daughter branches of Russian companies) that work in Armenia or through the private production companies which act also as distributors. The total amount of domestic films released in 2014 was 18 (among them 2014-2013 productions)
Volume of films released by foreign distributors:	There are two foreign distributors: Paradise and Star. Since the latter does not provide any data on release and admissions the only available information comes from Paradise Company and the “Moskva” Cinema and Nairi. The volume of foreign films released in 2014 makes up 67 films including Hollywood titles and other foreign productions.
EXHIBITION (For the last five years):	
Total number of cinemas	3

Total number of screens	12 screens (2394 seats excluding open air and screening venues in cultural centres / non cinema theatre)	
Number of digitized screens:	12	
Overall cinema admissions:	1.1 million admissions for the period of 2013	
Average ticket price in Euro	4 Euro	
Gross box-office revenues in Euro:	For the period of 2013 approximately 3.5 million Euro	
TOP 20 films by admissions	47 Ronin	USA
	The Wolf And Wall Street	USA
	A Love Through Time	USA
	Mr. Peabody & Sherman	USA
	300: Rise Of An Empire	USA
	Rio 2	USA
	Noah	USA
	New Spider-Man 2 - High Voltage	USA
	The Other Woman	USA
	Kitchen In Paris	Russia
	X-Men: Days of Future Past	USA, UK
	Maleficent	USA
	Transformers Age of Extinction	USA, China
	How To Train Your Dragon 2	USA
	Bring It On: All or Nothing	USA
	Dawn of The Planet of the Apes	USA
	Hercules	USA
	Guardians of the Galaxy	USA
	Ninja Turtles	USA
	Lucy	France

TOP 5 Domestic films by admissions	Super Mama Thank You Dad The House In The Heart Urishi Pokharen (Instead Of Others) Chambarum (In The Camp) Khagh Im Kanonnerov (The Game With My Rules)
TV BROADCASTING (For the last five years):	
Number and name of broadcasters:	TV Companies: Public – 2 TV companies National – 7 TV companies Broadcasting in the capital of Yerevan - 9 Regional – 25 With satellite broadcasting – 4 Cable TV channels – 52, of which in the regions – 30 Total number: 8 licensed broadcasters “First Channel” – the First Armenian Public TV Company CJSC, www.1tv.am “Shoghakat” public TV, “Spiritual-Cultural TV Company of Armenian Apostolic Church CJSC, www.shoghakat.am “Kentron” – “TV Cartoons Media-Kentron (Centre)” CJSC, www.kentron.tv “H2” – “The Second Armenian TV Company” LLC “Armenia TV” CJSC “Shant” LLC “Yerkir Media” CJSC “RTR Planet” LLC Other TV companies include: • ArmNews TV • ATV • Lime TV • AR TV • Yerevan TV • DAR 21 TV • USArmeniaTV / Armenia TV

	• ARTN TV / Shant TV USA • A1plus TV • Azatutyun TV • CivilNetTV • GalaTV • TVARM RU • AMGA TV • SOSI TV - Kapan • Khustup TV - Kapan • Hrazdan TV • 1in.am Armenian News TV • Horizon TV • Vitamin Club TV / Stand UP • Lori TV • Artsakh TV • Holy Etchmiadzin • MerHayrenik TV • MTV AM • ArmTV Music • Armenian Online Radio Radio companies: Total number (broadcasting in Yerevan): 16 Broadcasting in more than 1 region – 3 Regional – 4 “My Radio” – “Armenian First Public Radio Company”, www.armradio.am “FM 102.4 French Programme” “Vem” Radio, www.vem.am “AutoRadio”, www.autoradio.am “Radio Jan”, www.radiojan.am “Nor Radio” “Ardzaganq”, www.ardzagank.com “Arm Radio 107”, www.fm107.am “Yerevan” Radio, www.arradio.am

	"Hay" Radio, www.radiohay.am "Van" Radio, www.radiovan.fm "City FM" Radio, www.fm106.am "Hay FM" Radio, www.hayfm.am "Russian Radio", www.rusradio.am "Impulse" Radio, www.impuls.am "Radio Aurora", www.radioaurora.am
Budget spent on licensing foreign films :xxx public / xxx private	The licensing payment is maintained only by private distribution companies in Armenia, no public funds are envisaged for that. Though in 2015 Armenia is reconsidering this approach which further may lead to participation of some portion of public subsidy for that.
Language(s) of films shown on TV:	Armenian (predominantly), Russian (rare)
TV Financing/revenue models	The Armenian Public Broadcasting budget comes from three main sources - state funding, income from advertising and sponsorship and sale of audio and video products etc. State budget of Armenian Public TV and Radio - 2012-2013: 2012: 33 million AMD = 63 000 EURO; 2013: 42 million AMD = 76 000 EURO The budget of private TV companies is estimated to be around 20-30 million Euro but no official data are available.
HOME ENTERTAINMENT/DVD/INTERNET (For the latest available year):	
Average DVD price in euro (201x)	5-9 Euro
Number of sold DVDs (201x)	Legal volume round 20,000 annually
Estimated number of illegal DVD's sold	Round 2,000 per month
Average price of illegal DVD's	1-4 Euro
VOD platforms – domestic and international (number and descriptions)	Video on Demand in Armenia is only offered by the domestic company Ucom, www.ucom.am Description: Video on Demand of Ucom is a big video library offering HD quality movies of more than 10 different genres, 3D movies, Armenian content, etc. Movies collection includes genres from horror to romance, from animation to thriller. Ucom is also the first TV broadcaster in Armenia to offer 3D movies. Their movies database is updated regularly which allows to

	include the latest movie releases immediately. The price for one Feature film is 300 AMD (0.56 Euro), for animation 150 AMD (0.28 Euro).
Unauthorized streaming and downloading (estimated amount and descriptions	No data available.
PROMOTION (For the latest available year):	
Major national film festivals	“KinoAshun” (CinemaAutumn) (2010) a month-long cinema promotion project (festival) for Yerevan and the regions organized by the National Cinema Centre of Armenia, (NCCA) on an annual basis. www.ncca.am/ru/programs/view/article/29 “Hayak” the annual National Film Prize (2012), http://hayak.am
Major local film festivals	The International Film Festival for Children and Youth organised by the Rolan Bykov Armenian Foundation for Promotion of Cinema and TV (launched in 2001), www.rolanbf.com The “Mek Kadr” (One Shot) Cinema Festival (launched in 2003), www.accea.info/en/events/cinematheatre/list/36/53/ “Voske Tsiran” (Golden Apricot) International Film Festival (2004,) www.gaiff.am “KIN” (Woman) International Women’s Film Festival (2004), http://kinfestival.wordpress.com “YesEm” (ItsMe) International Youth Film Festival (2006), www.accea.info/en/events/cinematheatre/list/36/53/ “ArevVordi” (SunChild) International Environmental Festival (2007), www.sunchild.org “ReAnimania” Yerevan International Animation Film Festival (2009), www.reanimania.com The Nofi International Non-commercial Film Festival (2013), www.nofifestival.com
Participation, presentation of national films to international festivals/markets (last five years):	Armenia is present in Cannes film market since 2012. Armenian films participate in the top audiovisual events worldwide, including: Rotterdam IFF, Visions du Reel, Nyon (Switzerland), Venice IFF, Tbilisi IFF, Moscow IFF, Karlovy Vary Film Festival, Kinoshok Film Festival in Anapa (Russia), Manhattan IFF New York (USA), Short Film Festival in Berlin, Film Festival in Vienna (Austria), Seoul Film Festival in South Korea, Festival in Poland, Turin, and other cities

	and countries. Every year Armenian films harvest prizes from the top-class film festivals around the globe. In 2014 the most successful films were: “Endless Escape, Eternal Return” by director Harutyun Khachatryan, and “Tevanik” by Director Jivan Avetisyan.
Institution(s)/company(ies) in charge of international promotion/sales of national films	National Cinema Centre of Armenia
HERITAGE PRESERVATION (For the latest available year):	
National Film Archive, Cinemateque	Branch Office for Cinema-Photo-Phono-Documents of National Archives of Armenia, www.armarchives.am/en/ „Hayk“ Newsreel-Documentary Film Studio, http://haykdfs.com/ National Cinema Centre of Armenia, www.ncca.am
Other (foreign) archive preserving national film heritage	None
Holder of licensing rights of national film heritage	The Republic of Armenia
Yearly budget for film archiving and preservation Yearly budget for film restoration Yearly budget for film digitization	Branch Office for Cinema-Photo-Phono-Documents and Insurance Copies of National Archives of Armenia State Non-Commercial Organization - 91,330 Euro (or 50,231 thousand AMD). “Hayk” Newsreel-Documentary Film Studio - 7,935 Euro (or 4,364 thousand AMD) The National Cinema Center of Armenia - 5.200 Euro (or 2,860 thousand AMD) Total: 104465 Euro (exchange rate 1 AMD - 550 Euro)
AUDIOVISUAL EDUCATION (For the latest available year):	
Film schools including professions taught and number of graduations per year (see “manpower”)	Film Schools: (The list excludes the educational institutions with the focus on art, design, music, and composition) ***Armenian Academy of TV and Radio*** Web-site: www.academytvr.am professions taught: TV and Radio journalist, TV and Documentary Film Director, TV and Cinema Cinematographer (Cameraman), TV and Radio Anchor, TV broadcast editor

	graduations per year: 35 - 40 ***Armenian National Cinema Academy*** Web-site: www.kinoakademia.am Professions taught: academic courses (in cooperation with the State Institute of Cinema and Theatre) the graduate courses for scriptwriters and directors Graduations per year: up to 10 graduates ***Armenian State Teachers' Training University after Khachatur Abovyan*** Web-site: www.armspu.am Professions taught: Cinematography (cameraman), Artistic Photography, TV and Radio Journalism, TV Directing, Costume Design Graduations per year: up to 50 (related to TV and Film) ***Institute of Arts*** Web-site: www.arts.sci.am Professions taught: in the sphere of Art, Architecture, Decorative and Applied Arts, Music, Theatre, Film and Television Graduations per year: up to 30 related to Filmmaking ***Yerevan State Institute of Theatre and Cinematography*** Web-site: http://ysitc.am Professions taught: Acting (actor of dramatic theatre, actor of musical theatre, actor of pantomime theatre, actor of puppet theatre, actor of variety and circus theatre, actor of bandstand and mass ceremonies, speaker); Directing (drama theatre, musical theatre, bandstand and mass ceremonies theatre, puppet and variety or circus theatre); Choreography, Cinema (feature film director, documentary film director, animation film director, TV director, sound direction, director's cut); Drama Studies; History of Cinema; Scriptwriting, Cinematography; Painting (stage design, film and TV animation/cartoons), Arts management and Production, Computer art projecting, Costume modelling, etc. graduations per year: app. 800 students
Organizations for film literacy, like film clubs	***TUMO Centre for Creative Technologies*** Web-site: www.tumo.org Professions taught: extracurricular classes and workshops in Cinematography, Directing, Production, Post-Production, Animation, Photography, etc. ***Golden Apricot Fund for Cinema Development*** Co-production Forum, workshops and trainings on scriptwrit-

	ing, production, etc. ***"Akumb" (The Club)*** Film screenings and cultural events and meetings with directors/producers ***Art Film LLC*** Film screenings
Film in school curricula	People in Need and Caucadoc school project
Other forms of audio-visual education	NCCA "VoskeAshun" event Golden Apricot workshops and trainings, www.gaiff.am Directors Across Borders Forum and trainings, www.dabhub.com Caucadoc People in Need
MANPOWER (LIVING FROM INCOME OF THEIR AUDIO-VISUAL ACTIVITY) For the latest available year:	
Producers & production managers (201x)	50 (2014)
Script writers (201x) / Film directors (201x)	50 (2014)
Technicians (201x)	15 (2014)
Actors (201x)	60 (2014)
Computer–based picture design, editing and creation	5 (2014)
Composers	10 (2014)

ANNEX 2 - BELARUS STATISTICAL SNAPSHOT

KEY FACTS AND FIGURES	
Population (201x):	Population (2015-04-01): 9481.1 million
Capital:	Minsk
Area:	207,560 km^2
Median age:	39.9
Urban population:	(2015-04-01): 7 325 million
Languages:	Russian, Belorussian
Religions:	Orthodox, Catholic.
Currency	16180 BRB for 1 EURO
GDP per capita (201x):	GDP per capita (2014): 8,041 USD (approx. 6400 Euro)
Internet users (201x):	Internet users (2015-01-01): 6.5 million.
Authority/ies responsible for media and audio-visual policy and legislation	Ministry of Culture of Republic of Belarus
Laws and Regulations in place (summary)	“Cinematography in Republic of Belarus Law” №292-3 (2004-06-14) “Changes in Cinematography in Republic of Belarus Law” №357-3 (2012-05-04) President of Republic of Belarus Act №567 (2011-12-05) The Government of Republic of Belarus Act №173 (2012-02-23) The Government of Republic of Belarus Act №174 (2012-02-24)
Coproduction treaties signed / in negotiation	Russian Federation, Ukraine, Kazakhstan, Latvia, Lithuania, Estonia, Israel, China, Vietnam, France.

Signed Council of Europe European Convention on co-productions?	No
Member of Eurimages?:	No
Signed Council of Europe Convention TTT	No
DOMESTIC FILM FUNDING	
National/local Public Film Fund(s) (or other public authorities supporting films)	Department of Filmvideoart at the Ministry of culture of Republic of Belarus
Year of establishment	1992
Annual Budget	No data available
Number of staff, structure	6, Head of Department - Svetlana Yaroshevich
Number of film production projects annually supported, average budget of films and amount of support	2009 – 99 (8/87/4) 7.9 million. 2010 – 105 (6/92/7) 6.2 million. 2011 – 109 (6/9/94) 4.1 million. 2012 – 117 (8/101/8) 6.2 million. 2013 – 68 (11/50/7) 7.9 million. 2014 – 36 (6/23/7) 4.1 million.
Number of majority and minority co-productions annually supported, average budget of films and amount of support	No data available
Number of development projects annually supported, average de-	No data available

velopment budgets and amount of support	
Number of supported film releases (distribution support), average release budgets and amount of support	No data available
Other support activities (training, cinemas etc.)	No data available
Other/ Private Film Financing Structures (banks, private funds, mecena, etc.)	No data available
The role of TV in film financing	Financing own productions.
The role of new online players (VOD etc) in film financing	No role
THE AUDIOVISUAL MARKET FILM PRODUCTION (For the last five years):	
Total number and list of active production companies	1. 'Belarusfilm' National Film Studio 2. 'NonStopMedia' filmproduction 3. 'NVP' Filmcompany 4. 'First FilmVideocompany' 5. 'Mediaprof production' 6. Belparthner TV 7. 'Navigator' studio
Film production volume (cinema)	2010 – 105 2011 – 109 2012 – 117 2013 – 68 2014 – 36
Average budget Feature/ documentary/ animation /shorts	0.1-0.3 million 0.003-0.01 million

Average financing structure of feature films (public/private – structure of each)	Support of Ministry of Culture is about 75%, animation, films for children – 100%
Volume of co-productions	No data available
Average budget of co-productions	No data available
Co- producing countries	Russian Federation
Main production genres	Drama, comedy, film for children
Film production volume TV (in-house production) Average budget	2010-2014: 12 No data available
Film production volume TV (com-missioned production	6
Average budget	No data available
Average financing structure	No data available
THEATRICAL DISTRIBUTION (For the last five years):	
Number and names of distribution companies	Active 1. Interfilm distribution 2. Cinemascope 3. BFG Belarusian Film Group 4. Belparthner TV In fact, the market of theatrical distribution is part of Russian distribution market and under control by Russian companies (WDSSPR, UPI, Каро-Премьер, Централ Партнершип, Парадиз).

Number of films distributed by distribution companies? released by foreign distributors:	300 (approximately)
Volume of films released by national distributors:	5%
Volume of films released by foreign distributors:	No data available
EXHIBITION (For the last five years):	
Total number of cinemas	103
Total number of screens	155
Number of digitised screens:	77
Overall cinema admissions:	14.5 million
Average ticket price in Euro	3.5
Gross box-office revenues in Euro:	18 million
TOP 20 films by admissions	2015 1. The Hobbit: The Battle of the Five Armies 2. The Hobbit: The Desolation of Smaug 3. Transformers: Age of Extinction 4. Interstellar 5. Елки-3 (Russian Federation) 6. Noah 7. Guardians of the Galaxy 8. Вий (Russian Federation, Ukraine, Germany) 9. How to Train Your Dragon 2 10. X-Men: Days of Future Past
TOP 5 Domestic films by admis-	No data available

sions	
TV BROADCASTING (For the last five years):	
Number and name of broadcasters:	Belteleradiocompany – 5 TV and 3 radio channels. ONT – 1 TV and 1 radio channel. STV – 1 TV channel. All in owned and controlled by the state.
Budget spent on licensing foreign films :xxx public / xxx private	No data available
Language(s) of films shown on TV:	Russian, Belorussian
TV Financing/revenue models	State finance, advertising
HOME ENTERTAINMENT/DVD/INTERNET (For the latest available year):	
Average DVD price in Euro (201x)	3.5 Euro
Number of sold DVDs (201x)	No data, the DVD-market in Belarus is mostly illegal
Estimated number of illegal DVD’s sold	No data available
Average price of illegal DVD’s	2-2.5
VOD platforms – domestic and international (number and descriptions)	ZALA.by interactive TV, a part.of Beltelecom state telefon operator monopoly
Unauthorized streaming and downloading (estimated amount and descriptions	Rutrucker.org – The most popular torrent-trucker for downloading film and music in Belarus.
PROMOTION (For the latest available year):	
Major national film festivals	Minsk International Film Festival ‘Listapad”(November)

Major local film festivals	"Animaevka" festival of animation, Magilev (September) International Catholic Festival of Christian Documentary Films and TV Programs MAGNIFICAT, Glybokae region (September).
Participation, presentation of national films to international festivals/markets (last five years):	2012 - Cannes Film Festival 'In The Fog' by Sergey Loznitza (Germany, Russia, Netherlands, Latvia, Belarus) Annual pavilion at Cannes Film Festival.
Institution(s)/company(ies) in charge of international promotion/sales of national films	Belarusfilm National Film studio
HERITAGE PRESERVATION (For the latest available year):	
National Film Archive, Cinemateque	The Belarusian State Archives of Films, Photographs and Sound Recordings
Other (foreign) archive preserving national film heritage	National Film Foundation of Russian Federation
Holder of licensing rights of national film heritage	Ministry of Culture of Republic of Belarus, 'Belarusfilm' National Film studio
Yearly budget for film archiving and preservation	No data available
Yearly budget for film restoration	No data available
Yearly budget for film digitization	No data available
AUDIOVISUAL EDUCATION (For the latest available year):	
Film schools including professions taught and number of graduations per year (see "manpower")	Belarusian State Academy of Arts, Faculty of Filmmaking (Filmart)
Organisations for film literacy, like	Museum of the History of Belorussian Cinema (Minsk), CINEMASCOPE archive programmes (Raketa cinema, Zair

film clubs	Azgur museum, Minsk).
Film in school curricula	No
Other forms of audio-visual education	No data available
MANPOWER (LIVING FROM INCOME OF THEIR AUDIO-VISUAL ACTIVITY) (For the latest available year):	
Producers & production managers (201x)	5-6
Script writers (201x)	No data available
Film directors (201x)	10-15
Technicians (201x)	No data available
Actors (201x)	No data available
Computer–based picture design, editing and creation	No data available
Composers	No data available

ANNEX 3 - GEORGIA STATISTICAL SNAPSHOT

KEY FACTS AND FIGURES	
Population (201x): Capital: Area: Median age: Urban population: Languages: Religions: Currency: GDP per capita (201x): Internet users (201x):	Population (2013): 4. 477 million Tbilisi 153,909 km^2 33.2 2,390,333.59 Georgian Orthodox Christianity GEL (lari) 3680.8 USD (approx. 3000 Euro) in 2014 483 000 users (2013)
Authority/ies responsible for media and audio-visual policy and legislation Laws and Regulations in place (summary)	In accordance with the Presidential Decree #138 of 24 February 2009, Georgian National Film Centre (GNFC) became the competent body to grant the official status to the co-production projects based on the regulations of the concerned convention. Key policy document: Georgian Law on State Support to National Cinematography (dated 5 December 2000) • The Competitive Regulations of the GNFC • The Regulations of the Expert Commission of the GNFC • Regulations of the GNFC • Regulation of the President of Georgia about Co-Production Status Granting Authority

Coproduction treaties signed / in negotiation	Bilateral Co-production Agreement with France In order to prioritise the granting of public subsidies to co-productions in 2010 GNFC announced a separate competition to supporting European co-productions with Georgian participation. The competition conditions are tailored in compliance with the “European Convention on Cinematographic Co-production”. The announcement of the separate competition for co-productions encouraged new generation of film-makers to seek international cooperation. It also triggered interest of foreign producers to work with the Georgian film companies.
Signed Council of Europe European Convention on co-productions?	The “European Convention on Cinematographic Co-Production”, adopted in Strasbourg on 2 October 1992, was ratified by Georgia on 7 May 2002. National film certificates entered into force on 19 October 2010. the national. By announcement of the GNFC as the competent body the “European Convention on Cinematographic Co-Production” was activated and became fully functional as part of the Georgian film funding system.
Member of Eurimages?:	Membership to Eurimages since October 2011 strengthened the quality of the projects, created opportunity for alternative financing and consequently increased number of co-productions with Georgia.
Signed Council of Europe Convention TTT	Signed on 29/10/2003, not ratified.
DOMESTIC FILM FUNDING	
National/local Public Film Fund(s) (or other public authorities supporting films)	Georgian National Film Centre – its goal being to secure and coordinate the state support for the development of the Georgian cinema
Year of establishment	2001
Annual Budget	5 million 270 GEL (lari)

Number of staff, structure	23 staff members. 5 structural departments: • Film Financing • Research & Strategy • Export and Distribution • Film Commission • Administration
Number of film production projects annually supported, average budget of films and amount of support	9 production projects supported. Average budget of films 600 000 GEL (239 000 Euro) Amount of support 450 000 GEL (179 000 Euro)
Number of majority and minority co-productions annually supported, average budget of films and amount of support	Majority - 3 co-productions, minority 2-3, average budget – 900 000 GEL (358 000 Euro)
Number of development projects annually supported, average development budgets and amount of support	9 development projects supported annually, average budget 8000 GEL (3200 Euro)
Number of supported film releases (distribution support), average release budgets and amount of support	No.
Other support activities (training, cinemas etc.)	No support
Other/ Private Film Financing Structures (banks, private funds, mecena, etc.)	• Ministry of Culture and Monuments Protection of Georgia • Film Production Support Programme at the Ministry of Education, Culture and Sport of Adjara Autonomous Republic of Georgia • Private Funding is occasional
The role of TV in film financing	No role

The role of new online players (VOD etc) in film financing	No role
THE AUDIOVISUAL MARKET FILM PRODUCTION (For the last five years):	
Total number and list of active production companies	Studio “Formula Creative”, Studio Millimetre Film (www.millimetrefilm.com)
Film production volume (cinema)	No support
Average budget Feature/ documentary/animation /shorts	1 200 000 (519 481 Euro); 800 000 (346 320 Euro); 150 000 (64 935 Euro); 30 000 (12 987 Euro)
Average financing structure of feature films (public/private – structure of each)	No data available
Volume of co-productions	600 000 GEL (239 000 Euro)
Average budget of co-productions	250 000 GEL (99 500 Euro)
Co- producing countries	Germany, Greece, Israel, Russia, Britain, Estonia, Ukraine
Main production genres	Drama, black comedy
Film production volume TV (in-house production)	No data available
Average budget	No data available
Film production volume TV (commissioned production)	No data available
Average budget	No data available
Average financing structure	No data available

THEATRICAL DISTRIBUTION (For the last five years):	
Number and names of distribution companies	There is just one official distribution company “Rustaveli Ltd.”, which at the same time owns the majority of theatres
Number of films distributed by distribution companies? released by foreign distributors:	Approximate number of films annually 30-35
Volume of films released by national distributors:	30-35 annually
Volume of films released by foreign distributors:	There is no foreign distributor officially working in Georgia.
EXHIBITION (For the last five years):	
Total number of cinemas	12
Total number of screens	22
Number of digitised screens:	16
Overall cinema admissions:	300 000 annually
Average ticket price in Euro	5-7 Euro (7-14 GEL)
Gross box-office revenues in Euro:	Last available data is for 2014 – 6 180 000 GEL (2 675 325 Euro)
TOP 20 films by admissions	2013: Hangover Big Getsby PI's Life Jango Ozy Gravitation Frozen

	The Hobbit: The Desolation of Smaug Ironman Forsage University of Monsters' Tori- dark word World War The Wolverine Disgusting me The Conjuring Hunger Games Crowd's Family Turkeys Last time in Vegas 2014: 47 Ronnins Tarzan Noah 300: Rise of an Empire Batman Rio X humans Other woman Transformers Maleficent Turtle Ninjas Lusy Annabelle Dracula Wall Street Wolf Interstellar Hunger Games Madagascar Penguins Moses: gods and kings Hobbit: fight of five armies 2015:

	The Snow Queen Night in Museum Taken Birdman Dumb and Dumber to Paddington Adventure Jupiter Ascending 50 Shades of Gray Spongebob the Trick Secret Agent Once in Berlin Cinderella House Insurgent Forsage The Avengers The Longest Ride Shaun the Sheep Mad Max
TOP 5 Domestic films by admissions	2013: What happened in Kiev Lost light days Tangerines Nanny My wife's friends 2014: Taxi Fall in love in five sights Tbilisi I love you The mine Tease kids 2015: I'm Beso Blind Dates

	Lost in Karastan 3+3 Limited Credit
TV BROADCASTING (For the last five years):	
Number and name of broadcasters:	Public Broadcaster I, Second Arkhi. Private broadcasters Rustavi2, Imedi, Maestro, cable TV company Silk-Net broadcasts up to 140 channel though its network.
Budget spent on licensing foreign films :xxx public / xxx private	Budget data of Public Broadcaster are not available. Budgets of commercial TV channels amount to 3 703 704 – 4 259 259 Euro annually (including soap operas and movies)
Language(s) of films shown on TV:	Georgian, English with subtitles, Russian with subtitles. Public Broadcaster and private TV channels are obliged to dub or subtitle foreign films. Cable TV companies rebroadcast hundreds of foreign TV channels in original languages.
TV Financing/revenue models	Commercial TV channels cover costs from advertisement, but only Rustavi2 (the biggest private national channel) covers the whole budget from the advertisement without any donors. Others – are parts of large private holdings and donated from income of other businesses of the holding.
HOME ENTERTAINMENT /DVD/INTERNET (For the latest available year):	
Average DVD price in Euro (201x))	10-30 GEL (4-13 Euro)
Number of sold DVDs (201x)	No data available
Estimated number of illegal DVD's sold	No data available (approximately 98% or DVD sold are illegal)
Average price of illegal DVD's	No data available

VOD platforms – domestic and international (number and descriptions)	No data available
Unauthorized streaming and downloading (estimated amount and descriptions	No data available. 100% of streaming and downloading in Georgia is illegal
PROMOTION (For the latest available year):	
Major national film festivals	As Georgia is a small country, "local" and "national" festivals are the same. All local festivals can count as national as well.
Major local film festivals	Tbilisi International Film Festival "Promete", Student festival "Amirani", Batumi International Film Festival "BIAFF", International Documentary Film Festival "CineDoc", International Christian Film Festival "St. Andrew's Cros". Animation Film Festival "Tofuzi".
Participation, presentation of national films to international festivals/markets (last five years):	Retrospective programs: London, Paris, Kiev-Odessa Kharkov, Skopje, Bratislava, Strasbourg Participation in European Film Markets and Forums European Film Market, Berlin, since 2007 Cannes Film Market, since 2008 Connecting Cottbus, Cottbus IFF When East Meets West, Trieste Boat Meetings, Kyiv Baltic event, Tallinn
Institution(s)/company(ies) in charge of international promotion/sales of national films	GNFC
HERITAGE PRESERVATION (For the latest available year):	

National Film Archive, Cinemateque	Cinema Department of the National Archive (under the Ministry of Justice), Studio „Kartuli Filmi“, studio „Mematiane“, studio „Telefilmi“
Other (foreign) archive preserving national film heritage	Majority of old Georgian films are archived in Belie Stolbi, Russia, among other soviet films.
Holder of licensing rights of national film heritage	Authors hold all rights of their films, which are regulated by particular contract agreements. In 1990 after the collapse of USSR, Georgian directors and film-makers held a general assembly, which decided to allow authors of the films to keep the rights without any special licensing or other legal proceedings.
Yearly budget for film archiving and preservation	No data available – National Archive does not have any separate budget for the Cinema Department.
Yearly budget for film restoration	The amount is not stated in the budget
Yearly budget for film digitization	The amount is not stated in the budget. During the last 5 years 6 films have been rehabilitated and digitalized, expense of each– up to 30 000 GEL. (12,000 – 13,000 Euro)
AUDIOVISUAL EDUCATION (For the latest available year):	
Film schools including professions taught and number of graduations per year (see “manpower”)	The Shota Rustaveli Theatre and Film Georgia State University - 35-45 graduates per year from Cinematography department. At the present moment the total number of students at all four year is around 150.
Organisations for film literacy, like film clubs	Club at The Shota Rustaveli Theatre and Film Georgia State University and at Kinosaxli.

Film in school curricula	**Cinema in School** • The project Cinema in School was successfully implemented in 2014 in 40 schools, 1500 pupils. 12 000 viewers • In 2015 more than 160 schools, 5000 pupils, 45 000 viewers. **European Young Audience Award** • After successful award selection in 2014, this year Tbilisi will be part of this event among 25 European cities. **Giffoni Georgia** • In October 2015 the biggest children's film festival in the world Giffoni will be held in Georgia. 15 guests from 6 countries. Around 500 Georgian participants.
Other forms of audio-visual education	• Mini EAVE program: 5 projects, 5 participants without project • Maia Workshops: GNFC scholarship issued to 1 Georgian participant • GNFC / Robert Bosch Stiftung Industry meetings Georgia: 11 projects / 20 participants • Launching a quarterly film magazine – FILMPRINT
MANPOWER (LIVING FROM INCOME OF THEIR AUDIO-VISUAL ACTIVITY) (For the latest available year):	
Producers & production managers (201x)	Based on the research performed by ACT Company in 2010 the number of technical personnel was 182 ad that of the managers was 42 (producers & production managers & film directors). Since there is not obligatory state licensing or professional database it is not easy to define the numbers of actors, for example, everybody who once appeared at the screen could present him/herself as an actor. The same logic works for producers' number. Sometimes a film director calls him/herself a producer or co-producer in the film titles, but

	they could not be included into professional producers' number.
Script writers (201x) / Film directors (201x)	No data available.
Film directors (201x)	No data available.
Technicians (201x)	No data available.
Actors (201x)	No data available.
Computer–based picture design, editing and creation	Studio "Comedy Club", studio "Ghamis Show", advertising company Metro, advertising company "SakIdeaMsheni. Most famous artists are working in this field is Giorgi Popiashvili.
Composers	No data available.

ANNEX 4 - MOLDOVA STATISTICAL SNAPSHOT

KEY FACTS AND FIGURES	
Population (201x):	Population (2014): 3 557 634 citizens (excluding Transnistria and the city of Tighina).
Capital:	Chisinau
Area:	33.843.5 km²
Median age:	37.0 (2013)
Urban population:	1,502,996 (42.25%)
Languages:	Romanian, Ukrainian, Russian, Gagauz, Bulgarian and Romani.
Religions:	Orthodox 93.34%, Protestantism (all denominations) 1.98%, Catholicism 0.14%
Currency:	Leu (MDL)
GDP per capita (201x):	GDP per capita (2014): 2.456 USD (approx. 1996 Euro)
Internet users (201x):	Internet users (2013): 1 748 635
Authority/ies responsible for media and audio-visual policy and legislation	There is no specialised regulatory authority for the print media. The Coordinating Council of Audio-visual regulates electronic media.
Laws and Regulations in place (summary)	Laws and Regulations in place (summary): print media are regulated by the Press Law while electronic media fall under the Audio-visual Code. Online media are not regulated. To a certain extent, national legislation is in line with European standards. As an example, the Audio-visual Code states that starting 1st of January 2010, the broadcasters must have production ownership of at least 80% of the programmes content that should have a domestic and European character. 50% of this content must be broadcasted in prime time. However, the challenge lies in the implementation of this norma-

	tive act.
Coproduction treaties signed / in negotiation	No data available.
Signed Council of Europe European Convention on co-productions?	Yes. Signed by Moldova on 11 January 2008 (European Convention on Cinematographic Co-Production)
Member of Eurimages?:	No
Signed Council of Europe Convention TTT	Yes (The European Convention on Transfrontier Television)
DOMESTIC FILM FUNDING	
National/local Public Film Fund(s) (or other public authorities supporting films)	Through the Government Decision of 18 October 2001 regarding the establishment of the Cinematography Department (Official Journal of Republic of Moldova, 2001, 126 – 128, art. 1154), the Cinematography Department was created, but it was short-lived. Later, within the Ministry of Culture, the Cinematography Directorate was founded, and closed down in 2006. Since then, the Ministry of Culture did not consider any action towards reinstating such a directorate. Presently, cinematography policies are led under the mandate of: Ministry of Culture as central public authority in the field of cinematography; National Centre of Cinematography (CNC) as public institution in charge of implementing cinematography policies. (Cinematography Law 116/03.07.2014). Currently, the CNC has not yet been established. Non-state institutions: Moldova Filmmakers Union (Uniunea Cineastilor din Moldova - UCM)
Year of establishment	CNC is not yet established; UCM was founded in 1962.

Annual Budget	Data not available, as CNC is not operational.
Number of staff, structure	According to the cinematography law, the CNC should be set to function with a 5 members Council. CNC Structure (subsections): National Film Archives; Cinematographic Register.
Number of film production projects annually supported, average budget of films and amount of support	No data available. As specified by the legislation, the state contribution to the financing of the national film production cannot exceed 50% of the production cost estimate.
Number of majority and minority co-productions annually supported, average budget of films and amount of support	No data available.
Number of development projects annually supported, average development budgets and amount of support	No data available.
Number of supported film releases (distribution support), average release budgets and amount of support	No data available.
Other support activities (training, cinemas etc.)	No data available.
Other/ Private Film Financing Structures (banks, private funds, mecena, etc.)	The film „Chişinău - o capitală europeană" ("Chisinau – an European capital") is a first regarding the promotion of the touristic and cultural potential of Chisinau, as well as its investment environment. OWH TV Studio, in partnership with "IDIS Viitorul" and the Mayoralty of Chisinau and with the support of the Hanns-Seidel Foundation carried out the film production. Financial data are not available.

The role of TV in film financing	No data available, however a rather sizeable extent of the TV stations are involved in film production, in particular documentaries.
The role of new online players (VOD etc) in film financing	There is no such financing
THE AUDIOVISUAL MARKET FILM PRODUCTION (For the last five years):	
Total number and list of active production companies	Moldova-film, OWH STUDIO, Atelierul Sergiu Prodan, "Buciumul" film studio, Telefilm-Chisinau, PRIM-PLAN STUDIO; advertising agencies based on video production “Target Creative”, “Diver Intermedia”.
Film production volume (cinema)	According to Moldova-film studios: 3-4 feature films, 20 short films and at least 50 documentaries. In fact, barely 1 feature film is produced per year
Average budget Feature/documentary/animation /shorts	No accurate data available.
Average financing structure of feature films (public/private – structure of each)	there are no accurate data available. However, the feature film "Patul lui Procust (the Procrustean bed)", directed by Sergiu Prodan had been produced by using 600,000 USD from the state budget and 200,000 USD via crowdfunding. In 2009, "Lupii şi Zeii (Wolves and Gods)", another feature film, was shot using a budget of 3 million lei (approximately 150,000 EUR)
Volume of co-productions	There are no official records, although several co-productions were shot, such as: a Romanian-Moldovan-Luxemburgish co-production for the feature film “Nunta in Basarabia (Wedding in Bessarabia)”, and a Moldovan-Romanian-Austrian co-production for the short film: „Moldova-Aproape-Departe (Moldova-Near-Far)”.

Average budget of co-productions	There are no financial estimation. Nevertheless, there are certain known facts. The first Moldovan-Italian cinematographic project kicked-off in March 2013. The writer and director of the „My Lady" film, Sandu Vasilache, is also the Director General of „Moldova-film" studios. According to the film producer, Angelo Iacono, the envisaged budget raises up to 3.4 million EUR. He also stated that they chose Moldova as a film set thanks to the affordable costs comparing to Italy. The film premiere was scheduled for the end of 2014 fall, however it never took place. Igor Cobileanski's film, „Limita de jos a cerului", a co-production Romania-Moldova is another example where the Moldovan contribution is lesser and little known.
Co- producing countries	Romania, Italy, Luxemburg, Austria etc.
Main production genres	Documentary, comedy, historic, short film, social drama
Film production volume TV (in-house production)	No data available.
Average budget	No data available.
Film production volume TV (commissioned production)	No data available.
Average budget	No data available.
Average financing structure	No data available.
THEATRICAL DISTRIBUTION (For the last five years):	
Number and names of distribution companies	With regard to the film distribution market, Moldova is part of the CIS. Once an external distribution contractor undertakes a new distribution agreement, Moldova is automatically included in its distribution network. As Moldova is part of the Russian distribution system, it receives exclusively films in the Russian language. Distribution companies purchase films according to the Russian demand; hence they are also dis-

	tributed to Moldova. The new cinematography law stipulates that solely Moldovan registered companies are authorized to distribute films. Once Moldova will no longer be part of the CIS distribution area, the Moldovan distributors will be able to make direct contracts with foreign distributors. This change will entail the possibility to choose between Romanian and Russian channels of distribution. Currently the Moldovan public can only watch films dubbed into Russian, since the Russians are automatically granted with distribution rights in Moldova whenever they sign contracts with foreign distributors. Besides, all theatres in Moldova project films via the Russian channels, therefore all premieres are dubbed into Russian. AltFilm – the first film distribution company in Moldova that delivers Romanian and European films was launched in 2011 by distributing on the Moldovan market the film "Caravana Cinematografică", directed by Titus Muntean, and produced by Libra Film. However, the company was not really successful.
Number of films distributed by distribution companies? released by foreign distributors:	No data available. Known facts: AltFilm distributed several feature films and some documentaries.
Volume of films released by national distributors:	No data available.
Volume of films released by foreign distributors:	Data not available, but most likely the higher volume of films is released through Russian channels, given that the Cinematography Law is not implemented.
EXHIBITION (For the last five years):	
Total number of cinemas	Permanent cinema theatres – 10.
Total number of screens	50 (cinema theatres with one screening room – 20, with two or more screening rooms - 30)
Number of digitised screens: xxx	No data available, but basically all 50 of them

Overall cinema admissions: xxx	No general data available. However, the largest cinema theatre ”Patria”, has 4 branches, therefore amounting 2364 seats (minimum 420 and maximum 908).
Average ticket price in euros	Ranging from 0.5 to 4 euro
Gross box-office revenues in euros:	No data available
TOP 20 films by admissions	There are no official rankings. However, in 2014, the most watched films in the ”Patria” theatres were: “The Hobbit”, “The Battle of the Five Armies”, “Ronin”, “The Penguins of Madagascar”, “Interstellar”, “Lucy”, “Noah”, “300: Rise of an Empire”, “Rio 2”, “Dracula Untold”. (this top 10 was put together by “Patria” cinema theatre network.)
TOP 5 Domestic films by admissions	Data not available, rankings not available
TV BROADCASTING (For the last five years):	
Number and name of broadcasters:	5 national broadcasters (Tv Moldova 1 – public; Prime Tv, Publika Tv, Canal 2, Canal 3 – private), 18 regional broadcasters (GRT-public, ProTv, JurnalTv, Tv7, EuroTv, AltTv, RealitateaTv, AccentTv, Tv CanalRegional, Tv Sport, Tv Gurinel, Tv Noroc, Tv Busuioc, Tv MBC, Tv Vocea Basarabiei, Tv N4, Tv 21, CTC Tv), 18 local broadcasters (BasTv, ArtTv, ImpulsTv, Elita Tv, EuroNovaTv, AlbasatTv, Tv Prim, Studio L, DrochiaTv, FlorTv, MediaTv, Aiin Aciik Tv, ATV, SorTv, Tv Balti, NTS, Triumf Tv, Tv Eni Ai).
Budget spent on licensing foreign films :xxx public / xxx private	No data available. In 2014, TV Moldova 1 planned to purchase 1739 hours of film broadcasting (cartoons, documentaries, feature films) with a total value of 9.728 million lei (472,700 Euro).
Language(s) of films shown on TV:	Usually, in Russian or English, with Romanian subtitles

TV Financing/revenue models	No data available.
HOME ENTERTAINMENT/DVD/INTERNET (For the latest available year):	
Average DVD price in euros (201x)	8-10 euro.
Number of sold DVDs (201x)	No data available.
Estimated number of illegal DVD's sold	Accurate data not available; however, specialists claim that approximately 75-80 percent of the films broadcasted by TV broadcasters are illegally copied.
Average price of illegal DVD's	5-8 euro.
VOD platforms – domestic and international (number and descriptions)	Domestic and international (number and descriptions) – In 2013, the Association for the Promotion of Romanian Film together with the National Cultural Fund Administration initiated the launch of an online platform exclusively designed for Romanian movies (romfilmpromotion.ro). It comprises recent feature films, but also classic films of the Romanian cinema. The list is periodically updated. Other platforms: Play Movies, YouTube, Google Play
Unauthorized streaming and downloading (estimated amount and descriptions	No data available.
PROMOTION (For the latest available year):	
Major national film festivals	The International Animation Film Festival 'Anim'est', the International Documentary Film Festival 'Cronograf', the International Film Festival 'Toamna de Aur', the International Theatre and Film Schools Festival ' ClassFest'.
Major local film festivals	Filmmakers Union – Student Film Festival 'Debut'; Filmmakers Union – National Cinema Days Festival

Participation, presentation of national films to international festivals/markets (last five years):	"La limita de jos a cerului", directed by Igor Cobileanski – Official Selection Karlovy Vary Festival, submitted for the Academy Award for Best Foreign Language Film; "Arrivederci", directed by Valeriu Jereghi – First Prize of the International Film Festival "Identita Film Festival" (Rome, Italy); Short films series „Moldova-Aproape-Departe" by Igor Cobileanski, presented at the largest Film Festival in the Baltic countries– „Black Nights International Film Festival"; "Ce lume minunată", directed by Anatol Durbală, winner Film Critics Prize, Warsaw Film Festival; International Student Film Festival 'Prolog' Kiev and Gulf Film Festival, Dubai.
Institution(s)/company(ies) in charge of international promotion/sales of national films	At Ministry of Culture level: - National Centre of Preservation and Promotion of Intangible Cultural Patrimony (PCI). - Research and Promotion institutions with regard to the Intangible Cultural Patrimony. National Museum of Ethnography and Natural History conducts research, enhances and promotes the intangible cultural patrimony. The Philology Institute within the Science Academy of Moldova (AŞM) conducts research and enhances the intangible cultural patrimony. However, these institutions are hardly involved in the film and cinema field. At Civil Society level: - A.O.C. (Asociatia Obştească pentru Cinema), internationally recognized as "Moldova Film Commission", was officially established in July 2013 in Chisinau. The main objective of this new organization was to revitalize and develop the Moldovan cinematography. The founders of A.O.C. Cinema – Italian and Moldovan citizens – deem Moldova as an important source of strong human and professional potential for film creation and production. However, the particular national economic situation and the financial condition of public administration and public facilities operating in the film sector

	are hindering the revival of cinema in Moldova. A.O.C. Cinema considered that the most appropriate way to revitalize Moldovan cinematography was to establish a structure that acted as a ”Film Commission”, an organizational model that exists in almost all countries in the world as in all regions of Italy. The objective of such a Commission is to attract and promote foreign and domestic film productions in their respective countries and/or regions. The A.O.C. Cinema intends to achieve the objective of attracting foreign film productions by offering them hospitality, assistance and other services needed for film and television production.
HERITAGE PRESERVATION (For the latest available year):	
National Film Archive, Cinemateque	Accurate data are not available. ”Moldova-Film” studios own more than 700 documentaries, approximately 170 feature films and short films, approximately 120 cartoons and nearly 500 didactic and science-awareness films. In fact, each studio possesses various genres of films in their cinemateques.
Other (foreign) archive preserving national film heritage	Accurate data are not available. “Moldova-Film” committed to take this task in charge, but did not specify the state of play
Holder of licensing rights of national film heritage	National Centre of Cinematography (CNC), not established yet (the law was adopted in 2014).
Yearly budget for film archiving and preservation	No data available.
Yearly budget for film restoration	No data available.
Yearly budget for film digitization	No data available.
AUDIOVISUAL EDUCATION (For the latest available year):	
Film schools including professions taught and number of graduations per year (see “manpower”)	The Academy of Music, Theatre and Fine Arts, Faculty of Theatre, Film and Dance. Departments:

	Theatrical Art, (Bachelor of Theatrical Art) Film Film directing, Film and TV editing (Bachelor of Arts and Cinematographic film director qualifications, TV; operator picture film, video, TV; radio direction; audio director.) Graduates: Animation Film Directing - 5 Directing, Film and TV Editing – 56 Film theory, TV Production – 10 Multimedia techniques, Sound, Editing - 14
Organisations for film literacy, like film clubs	There are merely isolated activities. Example: On 28 January 2015 the first public screening of Moldovan film clubs took place. The premises of the ODEON theatre hosted high-school students, professors and young people interested in non-formal education using documentaries. They watched the screening of “The Power of the Powerless / Puterea celor fără de putere”, directed by Cory Taylor, USA (58 min), within the framework of “One World in Schools” project. The post-screening debate panel moderated by the journalist Bogdan Dascăl, included Violeta Gorgos – artistic director, TVR IAŞI, Mario Straka – project manager „People in Peril Association” and Josef Šmída – member of Executive Committee of Federation of Young European Greens. One World Film Clubs are part of a larger project, "One World in Schools" / „O lume de văzut”, carried out in Moldova by “People in Need” in partnership with OWH Studio, funded by the Ministry of Foreign Affairs of the Czech Republic within the framework of Transition Promotion Program. The project seeks to supplement the lack of film education and comprises the organisation of documentary film clubs touching upon human rights and global issues. Thus, high school students are supposed to create films clubs where they would screen documentaries addressed to their colleagues and other interested public. The first public screening of One World Film Clubs was preceded by a press conference where the Caravan of documentaries Delhi - Cernauti - Chisinau was presented. The Caravan was a cultural event organised by the

	regional television studio TVR Iaşi that marked its 23 years of activity.
Film in school curricula	Not planned
Other forms of audio-visual education	Merely isolated and occasional activities
MANPOWER (LIVING FROM INCOME OF THEIR AUDIO-VISUAL ACTIVITY) (For the latest available year):	
Producers & production managers (201x)	No data available.
Script writers (201x) / Film directors (201x)	Accurate data not available. Estimation: 20-30.
Film directors (201x)	Accurate data not available. Estimation: 40-50
Technicians (201x)	Accurate data not available. Estimation: 30-40
Actors (201x)	Accurate data not available. Estimation: 30-40
Computer–based picture design, editing and creation	Accurate data not available. Estimation: 20-30.
Composers	Accurate data not available. Estimation: 10-20

ANNEX 5 - UKRAINE STATISTICAL SNAPSHOT

KEY FACTS AND FIGURES	
Population (201x):	48 240 902 as of Official population census in 2001, 42 910 885 as of 2015 according to the data of the National Statistics Service of Ukraine
Capital:	Kyiv
Area:	603 628 km²
Median age:	70 years
Urban population:	68.9 %
Languages:	Ukrainian - official language, Russian – common use, also in use in certain ethnical groups – Moldavian, Hungarian, Polish, Bulgarian
Religions:	Orthodox (majority), Catholic, Greek Catholic, Islam
Currency:	Ukrainian Hryvnia
GDP per capita (201x):	3 600.47 Euro in 2013
Internet users (201x):	18 million +
Authority(ies) responsible for media and audio-visual policy and legislation	Ministry of Culture of Ukraine Ukrainian State Film Agency Ukrainian State Film Agency is a part of the executive branch of power aimed at creating and implementing the state policy in the field of national film production as well as promoting Ukrainian cinema all over the world. Legal tasks of Ukrainian State Film Agency activities are set in the Presidential Decree “On Provisions of the Ukrainian State

Laws and Regulations in place (summary)	Film Agency”. Ukrainian State Film Agency allocates funding via open competitions twice a year. **National Television and Broadcasting Council of Ukraine** 1. The Constitution of Ukraine of 28.06.1996 – http://zakon4.rada.gov.ua/laws/show/254%D0%BA/96-%D0%B2%D1%80 2. Fundamental Principles of the Legislation of Ukraine on Culture, the Law №2117 of 14.02.1992 – http://zakon4.rada.gov.ua/laws/show/2117-12 3. The Law of Ukraine “On Cinematography” № 9/98 of 13.01.1998 –http://zakon4.rada.gov.ua/laws/show/9/98-%D0%B2%D1%80 4. Resolution of the Cabinet of Ministers of Ukraine “On approval of Policy of the State Registry of Film Producers, Distributors and Demonstrators” № 27 of 14.01.2004 – http://zakon4.rada.gov.ua/laws/show/27-2004-%D0%BF 5. Resolution of the Cabinet of Ministers of Ukraine “On approval of Policy of the State Certificate for the Right of Film Distribution and Demonstration” № 27 of 14.01.2004 – http://zakon4.rada.gov.ua/laws/show/1315-98-%D0%BF 6. The Law of Ukraine “On Copyright and Related Rights” № 3792 of 23.12.1993 – http://zakon4.rada.gov.ua/laws/show/3792-12 7. Civil Code of Ukraine, Law № 435 of 16.01.2003 – http://zakon4.rada.gov.ua/laws/show/435-15 8. The Law of Ukraine “On Television and Radio Broadcasting” № 3317 of 12.01.2006 – http://zakon4.rada.gov.ua/laws/show/3317-15 9. The Law of Ukraine “On Public Morality Protection” № 1296 of 20.11.2003 – http://zakon4.rada.gov.ua/laws/show/1296-15 10. Edict of the President of Ukraine “On Provisions of the State Agency of Ukraine for Cinema” № 404/2011 of 06.04.2011 – http://zakon1.rada.gov.ua/laws/show/404/2011 11. CIS Treaty for Cooperation of the Sphere of Cinematography – http://zakon2.rada.gov.ua/laws/show/997_877 Film production legislation 1. Resolution of the Cabinet of Ministers of Ukraine “On approval of Policy of the State Support for National Films in Producer System” № 813 of 05.06.1998 –

	http://zakon4.rada.gov.ua/laws/show/813-98-%D0%BF 2. Executive Order of the Ministry of Culture of Ukraine "On Approval of Procedure of Film Projects Competitive Selection for Inclusion into Program of National Films Production and Distribution" № 30 of 26.04.2011 – http://zakon4.rada.gov.ua/laws/show/z0687-11 3. Executive Order of the Ministry of Culture and Arts of Ukraine "On Procedure of Royalty Payments for Assignment of Copyright into the Film and Exploitation of the Film Being Produced by the Public Procurement of the Ministry of Culture and Arts of Ukraine" № 203 of 03.04.2002 – http://zakon4.rada.gov.ua/laws/show/z0413-02 4. Resolution of the Cabinet of Ministers of Ukraine "On approval of Temporary Policy of the Minimum Salary and Royalty Rates for the Films Being Produced by the Public Procurement on Film Studios of Ukraine" № 1252 of 26.09.2001 – http://zakon4.rada.gov.ua/laws/show/1252-2001-%D0%BF 5. The Law of Ukraine "On Ratification of the Treaty between the Cabinet of Ministers of Ukraine and the Government of the French Republic on Films Co-Production" № 4282 of 23.05.2012 – http://zakon2.rada.gov.ua/laws/show/4828-17, the text of the Treaty – http://zakon2.rada.gov.ua/laws/show/250_077 6. The Law of Ukraine "On Public Procurement" № 2289 of 01.06.2010 – http://zakon1.rada.gov.ua/laws/show/2289-17 7. The Law of Ukraine "On Ratification of the European Convention on Cinematographic Co-Production" № 1140 of 18.03.2009 – http://zakon3.rada.gov.ua/laws/show/1140-17, the text of the Convention – http://zakon3.rada.gov.ua/laws/show/994_136 8. Executive Order of the Ministry of Culture of Ukraine "On Approval of Guidelines on Application of Deadlines of Periods (Stages) of Film Production by Type, Runtime and Format" № 1076 of 28.09.2012 – http://dergkino.gov.ua/media/text/Nakaz%20pro%20vyrobku.doc 9. Resolution of the Cabinet of Ministers of Ukraine "Guidelines on Preliminary Payments in Public Procurement of Goods and Services" № 1404 of 09.10.2006 - http://zakon2.rada.gov.ua/laws/show/1404-2006- 10. Executive Order of the State Archives Committee of Ukraine "On Approval of Policy of Cinematic, Video, Photo and Phonogram Documents Transfer for Permanent Storage" № 70 of 24.06.2004 - http://zakon1.rada.gov.ua/laws/show/z1281-04 11. Executive Order of the State Film Agency of Ukraine "On

	Approval of the Limits for Film Runtime and Expenses per Screening Minute by Film Types in 2013" № 14 of 11.02.2013 – http://dergkino.gov.ua/media/text/nakaz%2014.doc 12. Executive Order of the State Film Agency of Ukraine "On Approval of the Limits for Film Runtime and Expenses per Screening Minute by Film Types" № 75 of 09.01.2012 – http://dergkino.gov.ua/media/text/nakaz75.doc 13. Executive Order of the State Film Agency of Ukraine "On Approval of Procedure of Initial Materials and Filmprints of the National Films and Film Chronicles Exploitation" № 77 of 12.11.2012 – http://dergkino.gov.ua/media/text/nakaz%2077.doc 14. Executive Order of the State Film Agency of Ukraine "On Approval of Policy of National Film Certificate and the Terms of its Issue" № 46 of 07.12.2011 - http://dergkino.gov.ua/media/text/posvidnazfilm.doc 15. Executive order of the Ministry of Culture of Ukraine "On Approval of the Guidelines to Formation of Production Costs in Film Industry Accounting" № 1238/0/16-07 of 10.10.2007 - http://dergkino.gov.ua/ua/page/54/nakaz_1238.html 16. Executive Order of the State Film Agency of Ukraine "On Approval of Guidelines to Model Contract of State Financial Support" № 76 of 09.11.2012 – http://dergkino.gov.ua/media/text/zmina%20nakaz%2076.doc 17. Executive Order of the State Film Agency of Ukraine "On Approval of Guidelines to Procedure of Public Procurement by the State Film Agency of Ukraine in Film Industry" № 22 of 07.10.2011 – http://zakon.nau.ua/doc/?uid=1041.49861.3&nobreak=1 <u>Film distribution legislation:</u> 1. Executive Order of the Ministry of Culture and Arts of Ukraine "On Approval of the Procedure of State Films Registration" № 571 of 31.08.2004 – http://zakon2.rada.gov.ua/laws/show/z1306-04/print1329900298335574 2. The Law of Ukraine "On Distribution of Audiovisual Works, Phonograms, Videograms, Computer Programs and Databases Copies" № 1587 of 23.03.2000 – http://zakon4.rada.gov.ua/laws/show/1587-14 3. Decision of the National Commission of Ukraine for Protection of Public Morality № 1 of 20.02.2007 "Criteria of Inclusion of Printed, Audiovisual, Electronic, and Other Products, Commercials, Messages and Materials Transmitted by Communica-

	tion Lines in the Category of Pornographic or Erotic Products" http://zakon.nau.ua/doc/?uid=1041.20251.0 4. Executive Order of the Ministry of Culture of Ukraine "On Expert Commission for Films Demonstration and Distribution under the Ministry of Culture and Tourism of Ukraine" № 390 of 13.06.2005 – http://zakon4.rada.gov.ua/laws/show/z0712-05 5. Ruling of the Constitutional Court of Ukraine in the Case of the Constitutional Presentation of 60 People's Deputies of Ukraine in Regard to the Official Interpretation of section 2, article 14 of the Law of Ukraine "On Cinematography" (the Case of Foreign Films Distribution) № 13-рп/2007 of 20.12.2007 – http://zakon4.rada.gov.ua/laws/show/v013p710-07 6. Resolution of the Cabinet of Ministers of Ukraine "On Approval of the Procedure of National Screening Time and its Exploitation by Film Industry and Television" № 1436 of http://zakon4.rada.gov.ua/laws/show/1436-98-%D0%BF14.09.1998 – 7. Resolution of the Cabinet of Ministers of Ukraine "Guidelines on Film Distribution and Demonstration" № 20 of 16.01.2006 – http://zakon1.rada.gov.ua/laws/show/20-2006-п 8. Executive Order of the Ministry of Culture and Tourism of Ukraine "On Approval of Exploitation of National Screening Time Report Forms and Instruction of Their Filling in" № 34 of 15.07.2009 – http://zakon2.rada.gov.ua/laws/show/z0727-09 9. Executive Order of the Ministry of Culture of Ukraine "On Approval of the Instruction of Ticketing System in Film Demonstration Facilities" № 326 of 25.05.2001 – http://zakon3.rada.gov.ua/laws/show/z0534-01 10. Executive Order of the Ministry of Culture and Arts of Ukraine "On Approval of Fire Protection Rules in Film Industry" № 483 of 02.10.1997 – http://zakon3.rada.gov.ua/laws/show/z0129-98 11. Executive Order of the Ministry of Culture and Arts of Ukraine "On Approval of Minimum Quantity Limits of Film Demonstration Facilities in Urban and Rural Areas" № 423 of 08.08.1997 – http://dergkino.gov.ua/media/text/nakaz%20423.doc <u>Taxation</u> 1. Tax Code of Ukraine № 2755 of 02.12.2010 – http://zakon4.rada.gov.ua/laws/show/2755-17 2. Resolution of the Cabinet of Ministers of Ukraine "On Approval of the List of Film Industry Entities (National Films Producers) Which Are Exempt from Land Tax for Land Used in

National Films Production Till January 1st, 2016” № 48 of 26.01.2011 – http://zakon2.rada.gov.ua/laws/show/48-2011-п

Upcoming legislative initiatives and changes:

The draft changes and amendments to the Law of Ukraine “On Cinematography” (#1317 from 9.12.2014). The changes to the Law demand the prohibition of the public use (broadcasting, screening in cinemas etc) of any audiovisual product that effects or threatens national security of Ukraine and in particular promotes and celebrates military potential and forces of the State – Occupier (Russian Federation).

The law was adopted and signed by the President in March 2015.

“The draft changes and amendments to the Tax Code of Ukraine concerning improvement of financial support of the national cinematography” (#1359 from 10.12.2014) – withdrawn from the Parliament in 2015

The draft proposed introduction of a system of fees to be paid by all demonstrators of audiovisual content as well as lottery operators.

The system introduces the fee of 20% of the minimum wage for 1 minute of the base of taxation. Increased fee of 50% of the minimum wage for 1 minute of the tax base will be applied to the films produced in the State-Occupier (Russian Federation). Reduced rate of 2% of the minimum wage for 1 minute of the tax base will be applied to the National films and audiovisual products.

Taxation of the gross gambling revenue of lottery operators – income after the formation of the prize pool and set the tax rate on income of 25%.

Taxation of the remaining fund of the National Lottery.

The project of the law is currently in the development stage.

Coproduction treaties signed / in negotiation

Ukraine – France co-production agreement ratified on the

	23.05.2012 In negotiation: Georgia, Israel, Argentina, Morocco Co-production treaties with Georgia and Israel are on the final stage of negotiation.
Coproduction treaties signed / in negotiation	Ukraine – France co-production agreement ratified on the 23.05.2012 In negotiation: Georgia, Israel, Argentina, Morocco Co-production treaties with Georgia and Israel are on the final stage of negotiation.
Signed Council of Europe European Convention on co-productions?	European Convention on Cinematographic Co-productions was signed on the 2nd of October in 1992 and ratified on the 1st of December 2012.
Member of Eurimages?:	The process of Ukraine becoming a member of Eurimages started in 2013 but was suspended due to the Resolution of the Cabinet of Ministers of Ukraine #65 from 1.03.2014 “On actions to save state finances and prevent losses of the budget of Ukraine” Point 10 of the Resolution says: “Termination of all the processes of joining international organizations (except of the International Centre for the Study of the Preservation and Restoration of Cultural Property (ICCROM) and international agreements where participation rules do not require membership fees or other payments from the state budget above approved budget allocations”
Signed Council of Europe Convention TTT	Since the 1st of July 2009 Ukraine became the full Party of the European Convention on the Transfrontier Television and according to the Article 19 of this Convention the National Television and Radio Broadcasting Council of Ukraine was designated

	as the authority responsible for it on behalf of the country.
DOMESTIC FILM FUNDING	
National/local Public Film Fund(s) (or other public authorities supporting films)	Ukrainian State Film Agency
Year of establishment	2010
Annual Budget	Confirmed budget for 2015 is 68.3 million UAH (227 600 Euro)
Number of staff, structure	30 persons Structure: Head of USFA, Department of state control and implementation of the film projects, Department of formation and implementation of the production and distribution of national films, Department of distribution, Legal department, Financial-economic department, Intellectual Property and State Register of producers, demonstrators and distributors department, Department of support and promotion of national films, Communications department, Department of documentary support and control, Department of internal audit, Department of prevention and detection of corruption.
Number of film production projects annually supported, average budget of films and amount of support	34 films (full length feature films – 8, full length co-productions – 3, short films – 7, documentaries – 12, animation – 4) (Report of Ukrainian State Film Agency 2013). Average budget of full length feature films: 1.5 – 3 million UAH (62 500 – 125 000 Euro) Average amount of support: 1 – 3 million UAH (41 700 – 125 000 Euro)
Number of majority and minority co-productions annually supported, average budget of films	8 films with average budget of 1.5 – 2 million Euro. Average amount of support from Ukrainian State Film Agency for full length feature film: 600 000 – 1 million UAH (25 000 –

and amount of support	41 700 Euro)
Number of development projects annually supported, average development budgets and amount of support	No support of development of the project.
Number of supported film releases (distribution support), average release budgets and amount of support	There is no funding category for the support of film release. In rare cases P&A expenses can be included in the subject of Contract between producer and Ukrainian State Film Agency.
Other support activities (training, cinemas etc.)	Support for events: film festivals, training programs, National Filmmakers Union of Ukraine, support for organization of presentation of Ukraine at International Film Markets (European Film Market, Marche du Film in Cannes, Karlovy Vary International Film Festival), local film markets
Other/ Private Film Financing Structures (banks, private funds, mecena, etc.)	At the moment there are no clearly functioning film financing structures in Ukraine. The only one private cultural fund “Development of Ukraine” stopped its program “I3 - Impulse, Idea, Innovation’. The activities of private investors are limited to private often not public cooperation. Lviv Film Centre https://www.facebook.com/lvivfilmcenter?fref=ts, http://filmcenter.lviv.ua/ An initiative is on the stage of development but moves in the direction of organization of the regional film fund in Lviv and Lviv region. Also Lviv Film Centre is acting as a regional Film Commission in cooperation and support of local authorities. The annual budget for 2015 – 200 000 UAH (8,500 Euro)

The role of TV in film financing	No data available.
The role of new online players (VOD etc) in film financing	No activities in area of film financing.
THE AUDIOVISUAL MARKET FILM PRODUCTION (For the last five years):	
Total number and list of active production companies	106 production companies and 13 film studios. Please see the list at the end of this annex.
Film production volume (cinema)	Up to 15 feature films per year
Average budget Feature/documentary/animation /shorts	Respectively 84,000 – 227,600 Euro / 21,000 Euro/ 2100 Euro
Average financing structure of feature films (public/private – structure of each)	Miscellaneous, varies from 100% state financing to 100% private. During 2010 – 2013 the average budget structure was 50% - state funding, 50% - private investments.
Volume of co-productions	3 – 8 films a year.
Average budget of co-productions	2 – 3 millionEuro
Co- producing countries	Russia, France, Germany, Serbia, Georgia, Italy, Turkey
Main production genres	Drama, comedy, thriller, documentary, TV series
Film production volume TV (in-house production)	Less than 1 feature film
Average budget	5 mil Euro
Film production volume TV (com-	No data available

missioned production)	
Average budget	No data available
Average financing structure	TV channels own investments
THEATRICAL DISTRIBUTION (For the last five years):	
Number and names of distribution companies	13 distribution companies Arthouse Traffic website: www.arthousetraffic.com Aurora website: http://www.auroragroup.com.ua Avangard Film website: www.avangardfilm.com.ua B&H Film Distribution website: www.bhfilm.com.ua Cascade-Ukraine website: http://www.casfilm.com Cinergia website: www.cinergia.com.ua Galeon Kino website: www.galeonkino.com.ua Kinomania website: www.kinomania.com.ua Inter-Film website: http://fd.interfilm.com.ua/ TopFilm Distribution website: www.top-film.ru Ukrainian Film Distribution website: www.ufd.kiev.ua Volga Ukraine website: http://www.volgafilm.com 86 Prokat website: 86.org.ua

	B & H – 41.1 % Ukrainian Film Distribution – 26.1 % Kinomania – 16.2 % Multi Media Distribution (formerly Avrora) – 3.6 % Gemini – 3.01 % Volga – 3.01 % Galeon – 2.75 % Interfilm – 2.48 % Arthouse Traffic – 0.7 %
Number of films distributed by distribution companies? Released by foreign distributors:	255 films per year
Volume of films released by national distributors:	255 films per year
Volume of films released by foreign distributors:	All films have to be released by national distributors.
EXHIBITION (For the last five years):	
Total number of cinemas	384 cinemas
Total number of screens	466 screens as of the beginning of 2014, de facto 82 screens are located on occupied territories
Number of digitised screens: xxx	60%
Overall cinema admissions: xxx	20.1 million viewers
Average ticket price in Euro	47 UAH (4 – 5 Euro in 2014; 1.5 Euro in 2015)
Gross box-office revenues in Euro:	as of 2014 – 942.7 million UAH (~ 79 million Euro)

TOP 20 films by admissions	The Hobbit: The Desolation of Smaug by Peter Jackson Viy (Вий) by Oleg Stepchenko Transformers: Age of Extinction by Michael Bay Love in a big city 3 by Marius Weisberg Frozen by Chris Bak Noah by Darren Aronofsky 47 Ronin by Carl Rinsch 4G Theory by Aleksander Karpilovsky, Ekaterina Telegina, Aleksander Kott, Levan Gabriadze Maleficent by Robert Stromberg Lucy by Luc Besson Guardians of the Galaxy by James Gunn Interstellar by Christopher Nollan 300: Rise of an Empire by Noam Murro Dracula Untold by Gary Shore How to train your Dragon by Dean DeBlois Rio 2 by Carlos Saldanha Ivan Tsarevich and Grey Wolf by Vladimir Toropchin Teenage Mutant Ninja Turtles by Jonathan Liebesman Hercules by Brett Ratner Penguins of Madagascar by Simon J Smith, Eric Darnell
TOP 5 Domestic films by admissions	Love in a big city 3 by Marius Weisberg, David Dodson Love in a big city 2 by Marius Weisberg The Guide by Oles Sanin The shadows of unforgotten ancestors by Lyubomyr Levytskyy Firecrosser by Mykhailo Illenko TOP Domestic films by admissions in 2014 1. Credens (by V. Vasyanovych) 2. Kiev cake (by O. Shaparyev) 3. The Green Jacket (by V. Tykhyy) 4. The Trumpeter (by A. Mateshko) 5. Sinevyr (by Oleksandr and Viacheslav Alyoshechkin) 6. Do you love me? (by Yulia Kurbatova) 7. Apart (by O. Shapiro) 8. Maydan (by S. Loznitsa)

	9. Lonely by contract (by Y. Matvienko) 10. The Tribe (by M. Slaboshpytskyy) 11. Such beautiful people (by D. Moiseev) 12. F 63.9 Love sickness (by D. Tomashpolskyy, O. Demianenko) 13. The Guide (by Oles Sanin) 14. Its me (by Anna Akulevych) 15. Babay (by M. Medvid)
TV BROADCASTING (For the last five years):	
Number and name of broadcasters:	Regional broadcasters are not included PERSHYY KANAL (The First Channel , National TV Company of Ukraine) www.1tv.com.ua 1+1 www.1plus1.tv 2+2 www.1plus1.tv 24 NEWS CHANNEL www.24tv.ua 5 CHANNEL www.5.ua ENTERFILM www.enterfilm.com.ua ERA www.eratv.com.ua INTER www.inter.ua ICTV www.ictv.ua K1 www.k1.ua K2 www.k2.ua

	M1 www.m1.tv MEGA www.megatv.ua MTV UKRAINE www.mtv.ua NOVYY KANAL (The New Channel) www.novy.tv NTN www.ntn.tv STAR TV www.startv.com.ua STB www.stb.ua TET www.tet.tv TONIS www.tonis.ua UKRAINA www.kanalukraina.tv HROMADSKE TV www.hromadske.tv ESPRESO TV www.espreso.tv
Budget spent on licensing foreign films :xxx public / xxx private Language(s) of films shown on TV: TV Financing/revenue models	No data available Ukrainian, Russian (Ukrainian subtitles) No data available

HOME ENTERTAINMENT/DVD/INTERNET (For the latest available year):	
Average DVD price in Euro (201x)	No data available
Number of sold DVDs (201x)	No data available
Estimated number of illegal DVD's sold	No data available
Average price of illegal DVD's	No data available
VOD platforms – domestic and international (number and descriptions)	**MEGOGO.NET** films, TV channel **NLOTV.com** Films, TV, shows, streams **DIVAN.TV** – films, TV, shows, streams No international VOD platforms
Unauthorized streaming and downloading (estimated amount and descriptions	**Ex.Ua** – films, TV shows, music, books **VK.ru** – social network with a big amount of unauthorized AV content available
PROMOTION (For the latest available year):	
Major national film festivals	MOLODIST INTERNATIONAL FILM FESTIVAL www.molodist.com ODESSA INTERNATIONAL FILM FESTIVAL www.oiff.com.ua IDFF DOCUDAYS UA www.docudays.org.ua KIEV MEDIA WEEK www.kievmediaweek.com WIZ-ART INTERNATIONAL

	FESTIVAL OF SHORT FILM www.wiz-art.com.ua KINOLEV INDEPENDENT FILM FESTIVAL www.idem.org.ua
Major local film festivals	KROK INTERNATIONAL ANIMATED FILM FESTIVAL www.krokfestival.com KINOLITOPYS KYIV INTERNATIONAL DOCUMENTARY FILM FESTIVAL www.kinolitopys.net.ua KYIV INTERNATIONAL SHORT FILM FESTIVAL www.kisff.org MUTE NIGHTS FESTIVAL OF SILENT FILM AND CONTEMPORARY MUSIC www.mutenightsfestival.com OPEN NIGHT www.opennight.org.ua SEMAFORE FAMILY FILM FESTIVAL www.semafor.at.ua IRPIN FILM FESTIVAL www.g-2b.com BERDYANSK INTERNATIONAL FILM FESTIVAL BRYHANTYNA www.bmkf.com.ua
Participation, presentation of national films to international festivals/markets (last five years):	Cannes IFF, Berlinale IFF, San Sebastian IFF, Warsaw IFF, Goa IFF

Institution(s)/company(ies) in charge of international promotion/sales of national films	There is no separate organisation in charge of promotion of National films. This function is among functions of Ukrainian State Film Agency and Ministry of Culture of Ukraine.
HERITAGE PRESERVATION (For the latest available year):	
National Film Archive, Cinemateque	National Dovzhenko Centre http://www.dovzhenkocentre.org/eng/
Other (foreign) archive preserving national film heritage	G. S. Pshenychnyy Central State film and photo archive of Ukraine http://tsdkffa.archives.gov.ua/About/ Mostly has films, photos, documentary films, records, chronicles before 1991.
Holder of licensing rights of national film heritage	National Dovzhenko Centre is a partial holder of the licensing rights of national film heritage. Most of the rights hold Film Studios (films produced before 1991), rights for films produced after 1991 holds Ukrainian National Film Agency.
Yearly budget for film archiving and preservation	5.5 million UAH (230 000 Euro) – overall budget including all expenses of the Centre, 300 000 UAH (12 500 Euro) for preservation.
Yearly budget for film restoration	No budget for 2015, in previous years – 1.6 million UAH (155,000 Euro)
Yearly budget for film digitization	No budget for 2015, in previous years – 4 million UAH (364,000 Euro)
AUDIOVISUAL EDUCATION (For the latest available year):	
Film schools including professions taught and number of graduations per year (see “manpower”)	KYIV NATIONAL KARPENKOKARY UNIVERSITY OF THEATRE, FILM AND TELEVISION www.knutkt.kiev.ua - Feature film director - Documentary film director - Dramaturgy – film and TV - TV director

	- Sound designer - Cinematography - Film theory - Organization of film production (producer) Graduations per year (film and television) – apx 100 graduates KYIV NATIONAL UNIVERSITY OF CULTURE AND ARTS www.knukim.edu.ua - TV director - TV and film journalist, presenter - Sound design - Cinematography - Actor Graduations per year (all faculties including film department) - 4800 INTER SCHOOL www.inter.ua/ru/interschool - Videography - TV journalist - Photography - Editor - Producer - Script writer, editor - Sound designer - Cinematography - Director • TV presenter Number of graduates per year – apx 80 graduates I.MYKOLAYCHUK INSTITUTE OF SCREEN ARTS www.inem.com.ua Private educational institution, no detailed information available

Organisations for film literacy, like film clubs	Apx – 170 film clubs in Ukraine Closer film club Les Kurbas film club Save Zhovten film club Les film club (Odessa) Hippocampus film club (Odessa) French Institute film club (Kiev) National University of Kyiv-Mohyla Academy film club American library film club Master class film club (Kiev) No name film club (Kiev) Film club of National filmmakers union of Ukraine (Kiev)
Film in school curricula	Film is not present as a separate subject in school crricula. Adaptations of Ukrainian literature classics are included in the school curricula.
Other forms of audio-visual education	Film.Ua faculty (film.ua) – series of master classes Odessa IFF Summer Film School (oiff.com.ua) – series of master classes Cultural project (culturalproject.org) – course of the history of film
MANPOWER (LIVING FROM INCOME OF THEIR AUDIO-VISUAL ACTIVITY) (For the latest available year):	
Producers & production managers 201x)	Exact disaggregated data on the categories/professions are very difficult to obtain. According to the Filmmakers Union of Ukraine there are around 1200 members of the Union and about 600 persons operating in the film industry unofficially.
Script writers (201x) / Film directors (201x)	
Film directors (201x)	
Technicians (201x)	
Actors (201x)	

Computer–based picture design, editing and creation Composers	

LIST OF ACTIVE PRODUCTION COMPANIES IN UKRAINE

FILM STUDIOS

FILM.UA
22 Zakrevskoho Str. Kyiv 02660 Ukraine
+38 044 501 39 71
info@film.ua, www.film.ua

INTERFILM PRODUCTION STUDIO
6/8 Tsytadelna Str. Kyiv 01015 Ukraine
+380 44 359 03 40
info@interfilm.biz, www.interfilm.biz

KINEMATOGRAFIST
5 Kominterna Str. Kyiv 01032 Ukraine
+38 044 235-53-93
kino@svitonline.com

NATIONAL CINEMATHEQUE OF UKRAINE
27 Kioto Str. Kyiv 02156 Ukraine
+38 044 513 07 66, +38 044 513 05 82
nku27@ukr.net, www.tost.kiev.ua

NATIONAL DOVZHENKO FEATURE FILM STUDIO
44 Peremohy Ave. Kyiv Ukraine
+38 044 456 92 31
kiktyev@ukr.net

ODESSA FILM STUDIO
33 Frantsuzkyi Blvd. Odessa 065044 Ukraine
+38 048 233 95 25
kino@odessafilm.com.ua, www.odessafilm.com.ua

O.O. KHANZHONKOV STUDIO
OF FILMS FOR CHILDREN AND YOUTH

18A Shota Rustaveli Str. Kyiv 01001 Ukraine
+38 044 289 39 71
office@hanzhonkov.com, www.hanzhonkov.com

STATE STUDIO OFDOCUMENTARY
FILMS UKRKINOKHRONIKA
18 Shchorsa Str. Kyiv 01133 Ukraine
+38 044 501 02 62

STARMEDIA
15 Tumanyana Str. Kyiv 02660 Ukraine
+38 044 390 50 60
info@starmediafilm.ru, www.starmediafilm.ru

STUDIO TV+
1 Shevtsova Str. Kyiv 03113 Ukraine
+38 044 498 98 10
producer@stvplus.com.ua, www.stvplus.kiev.ua

UKRAINIAN ANIMATED FILM STUDIO
27 Kioto Str. Kyiv 02156 Ukraine
+38 044 513 82 29
sales@ukranimafilm.com.ua, www.ukranimafilm.com.ua

UKRTELEFILM
15 Tumanyana Str. Kyiv 02002 Ukraine
+38 044 292 44 80
studio@ukrtelefilm.com, www.ukrtelefilm.com

YALTA FILM STUDIO
3 Mukhina Str. Yalta 98603 Ukraine
+38 0654 23 77 20
taranstudio@yaltafilm.com, www.yaltafilm.com

PRODUCTION COMPANIES

210 GOOD DEEDS LTD.
8/12 Andriivska Str. off.62 Kyiv 04070 Ukraine
nvladimir810@gmail.com
Production and Distribution Company.

23/32 PRODUCTION
25/49 Pochainynska Str. off.63 Kyiv 04070 Ukraine
+38 044 425 96 24
info@2332.com.ua, www.2332.com.ua
Production of commercials, music videos and short films.

3D PLAZMOFOR STUDIO
1 Henerala Pushkina Str. Dnipropetrovsk 49050 Ukraine
+38 050 961 99 03, +38 056 760 91 07
plazmofor@ukr.net
Production of documentary, educational and popular science films.

3DVIZATION
8a-2 Shumskoho Str. Kyiv 02098 Ukraine
+38 067 388 89 88
kruz-s@yandex.ru, www.3dvization.com
Provides full range of s3D services. We convert any images into top-quality s3D format. Shooting in s3D of any level.

435 FILMS
10A Filatova Str. off.2/14 Kyiv 01042 Ukraine
anna@435films.com.ua, www.435films.com.ua
Operates in the field of coproduction with European countries and worldwide. Produces feature movies, documentaries and short films.

A7 PRODUCTION
13 Anny Ahmatovoi Str. Kyiv 02068 Ukraine
+38 044 227 40 81
a7@a7tv.tv, www.a7tv.tv
Organizes full cycle of video production in Da Vinci 2K, Final Cut editing and 3D and VFX artists.

A.STEROID VISUAL WORKS
1 Husovskoho Str. Kyiv 01011 Ukraine
+38 044 280 51 74
info@a-steroid.com, www.a-steroid.com
Visual works, motion graphics, animation, design, sound design & music, production.

ADAMAHA FILM
53 Nakhimova Blvd. Mariupol 87525 Ukraine
+38 050 609 40 11, +38 0629 33 29 26
adamaha@kior.tv, www.kior.tv
Production Company specializing in art house and art cinema.

ADRENALIN BROTHERS
9A Mekhanizatoriv Str. Kyiv 03110 Ukraine
+38 044 459 01 87

adrenalin@adrenalinbrothers.com
www.adrenalinbrothers.com
Production Company, talent agency, location scouting

AL MEDIA MOVERS
136A Velyka Vasylkivska Str. Kyiv 01025 Ukraine
+38 044 205 52 11
info@media-movers.com, www.media-movers.com
Dubbing, subtitling, voice-over, translation, postproduction
in all languages.

ANIMAGRAD
22 Zakrevskoho Str. Kyiv 02660 Ukraine
+38 044 536 94 31
info@animagrad.com, www.animagrad.com
Animation studio specializes in development of animated series in 3D and 2D formats.

AURORA PRODUCTION
55Z Khoryva Str. Kyiv 04071 Ukraine
+38 044 492 88 84
office@auroragroup.com.ua
www.auroraproduction.com.ua
Financing and production of TV movies, mini-series (2
or 4 episodes) and TV series. The company also creates
feature films, both on its own and in coproduction.

AVANTELKOM
119 Saksahanskoho Str. Kyiv 01032 Ukraine
+38 044 425 16 09
vilhelmfilm@gmail.com
Producing center with possibilities and powers for
creating 3D products (commercial films, documentaries,
author programs).

BRAINDRAINTRAIN
36 Vorovskoho Str. off.61 Kyiv 01054 Ukraine
+38 044 569 36 40
info@braindraintrain.com, www.braindraintrain.com
3D modeling, 3D animation, motion design, concept art,
storyboarding, pre visualization, editing, color correction.

BUDUSCHEE
7/27 Kirpichnyi lane Odesa 065044 Ukraine
+38 048 233 95 71(91)
future-555@yandex.ua
Film production and distribution.

CAMARADAS
55 Olesya Honchara Str. Kyiv 01054 Ukraine
+38 044 234 20 08
do.it@camaradas.com.ua, www.camaradas.com.ua
Production and Postproduction Company.

CHIMNEY
35A Yaroslavska Str. Kyiv 04071 Ukraine
+38 044 462 56 36
info@chimney.com.ua, www.chimneygroup.com
Kiev office of the Swedish company Chimney with services in production, VFXfor features: concepts, art-direction, compositing, 3D, character animation, etc. Grading, sound.

CHUDESA-FILM
+38 098 534 58 53
e-news@ukr.net, www.chudesa-film.at.ua
Production of short and feature films.

CHUPAKABRA
25 Hoholivska Str. Kyiv 01054 Ukraine
+38 097 541 71 81
kadim@ukr.net
The company provides full range of feature, short and documentary film production. Produces 3D animation films. Post production services.

CINNAMON
19A Yakira Str. Kyiv 04119 Ukraine
+38 044 489 57 71
info@cinnamon.com.ua, www.cinnamon.com.ua
Commercials postproduction and visual effects for films and television.

CINEMAHOUSE PRODUCTION
19 Lesi Ukrainky Blvd. apt.165 Kyiv 04060 Ukraine
+38 044 501 22 62
info@cinemahouse.com.ua, www.cinemahouse.com.ua
Production and post-production company. Video and lighting equipment rental.

CONDOR DIGITAL KIEV
13 Velyka Zhytomyrska Str. off.2 Kyiv 01025 Ukraine
+38 067 403 70 55

jane@condor-post.com, www.condor.tv
Creatively focused and digitally linked, the company's post-production network creates and delivers award winning content for commercials, broadcast and features from low cost film production centers.

CRY CINEMA
1/40 Karla Marksa Str. Simferopol 95000 Ukraine
+38 050 688 51 57
crycinema@gmail.com, www.crycinema.com
Feature films production.

DIGITAL CINEMA UKRAINE
22 Zakrevskoho Str. Kyiv 02217 Ukraine
+38 044 536 94 31
dcu@digitalcinema.com.ua, www.digitalcinema.com.ua
Digital Cinema laboratory system Integrator. Provides professional top-level services for movie theaters, movie distributors and movie studios.

DIAMONDFILM PRODUCTION
14B Verhovnoyi Rady Blvd. off.87 Kyiv 02100 Ukraine
+38 044 232 05 01
diamondfilmproduction@gmail.com
www.diamondfilmproduction.com
Short, feature and documentary films production.

DIRECTORY FILMS
10A Naberezhno-Khreshchatytska Str. off.1 Kiev 04070 Ukraine
+38 044 361 44 26
info@directoryfilms.com, www.directoryfilms.com
Promotion of new generation of cinematographers of Ukraine, training of high-quality specialists and involvement of Ukrainian filmmakers into European projects.

DIVAKI PRODUCTION
20/22 Shulyavska Str. apt.137 Kyiv 03055 Ukraine
+38 044 592 88 01
info@divaki.com.ua, www.divaki.com.ua
Films, TV programs, music videos, video advertising and other video products.

EL PITEL LABORATORY
24 Zhukova Str. Kyiv 02156 Ukraine
+38 050 872 32 79

info@videolab.com.ua, www.videolab.com.ua
Production of short films, music videos and advertizing.
Video editing.

E-NOT PRODUCTION
Kyiv Ukraine
+38 050 331 76 44, +38 067 501 96 69
e-not@e-not.tv, www.e-not.tv
Production of commercials, viral, music videos and short films. Photo shooting & virtual 3D tours.

ESSE PRODUCTION HOUSE
60 Honchara Str. off.2 Kyiv 04070 Ukraine
+38 044 499 66 51
info@essehouse.com, www.essehouse.com
Postproduction, 3D animation.

EVOLUTION FILM PRODUCTION
19 Petrivska Str. Kyiv 04071 Ukraine
+38 044 455 90 09
denis.bazarenko@evolutionfilm.com.ua
www.evolutionfilm.tv
Production of short films, music videos, and advertising.

FAMILY TVC PRODUCTION
23 Prorizna Str. off.4 Kyiv 01030 Ukraine
+38 044 455 80 85
production@familytvc.com, www.familytvc.com
A full service production company. Full budgeting services for all types of production, including locations, permits, studios, casting, talent, crews, camera/lighting/ grip equipment.

FAST FORWARD
82A Mezhyhirska Str. off. 301 Kyiv 04080 Ukraine
+38 044 227 65 36
info@ff.net.ua, www.ff.net.ua
Postproduction and special effects.

FEST-ZEMLYA PLUS
44 Peremohy Ave. off.51 Kyiv 03057 Ukraine
+38 044 454 19 22
savelyeva.l.n@gmail.com
The company has been operating in feature film production since 1987. Its films were awarded at ‘A

class’ international film festivals, such as Cannes and Berlinale.

FILM-FEST LLC
102 Hromova Str. off. 62 Sevastopol 99002 Ukraine
+38 066 696 44 30, +38 0692 71 47 80
The company provides services of film production and distribution.

FILMPORT
6 Polyarna Str. apt.111 Kyiv 04201 Ukraine
+38 067 443 23 33
filmport@mail.ru, www.wix.com
Production of feature films and documentaries.

FILMSTAGE DIGITAL, LLC
+38 099 721 35 88 (Ukraine)
+1 718 879 89 22 (United States)
info@vladdelonge.com, www.vladdelonge.com
The digital visual effects company offers full-service visual-effects production from on-set supervision through 3D cg and complex compositing.

FILMTOASTER
8A Kudryavska Str. off.3 Kyiv 04053 Ukraine
+38 044 272 27 24
yana@filmtoaster.com, www.filmtoaster.com
Production of short and documentary films, music videos, commercials.

FRESH PRODUCTION
19 Obolonska Naberezhna build.4 off.1 Kyiv 04210 Ukraine
+38 044 537 12 24
info@freshproduction.com, www.freshproduction.com
Production of features film, TV dramas, TV Series and TV shows. The company was transformed into «Fresh Production Group» in 2008.

FRONT PICTURES STUDIO
4 Raisy Okipnoi Str. off.171 Kyiv 02002 Ukraine
+38 044 220 17 42
sales@frontpictures.com
Video editing, CGI.

FX FILM PRODUCTION COMPANY

mmozg@fx-film.kiev.ua, www.fx-film.com.ua
Production of short films, music videos, and commercials.

GAGARIN MEDIA
23 Velyka Vasylkivska Str. off.134 Kyiv 03150 Ukraine
+38 044 529 39 14
gagarinmedia@yandex.ru
Feature films production.

GANKAFILM AGENCY
43-45 Horkoho Str. off.20 Kyiv 03150 Ukraine
+38 044 289 04 58
gannatretyak@gmail.com, www.gankafilm.com
Produced commercials and films for international brands
from 2005 till 2011.

HARMATA FILM PRODUCTION
+38 097 222 37 10
iya@ukr.net
Production of feature films and documentaries.

HOPAK FILMS
16 Ivana Klymenko Str. Kyiv 03110 Ukraine
+38 050 382 22 49
gopakfilms@gmail.com
Different genre fiction and documentary films, TV films
and series.

GSK PRODUCTIONS
79/1 Pushkinska Str. Kharkiv 061024 Ukraine
+38 093 973 27 52
gsk_usa@hotmail.com, www.gsk-productions.com
Providing film studios for shooting, set design and set
installation, props supply, casting services, outdoor shooting.

GULLIVER CINEMA
49 Artema Str. off.5A Kyiv 04053 Ukraine
+38 067 373 50 20
shramko@gulliverfilm.com.ua, www.gulliverfilm.com.ua
Full cycle of feature films production.

HIGHLIGHT PICTURES
12B Mykhaylivska Str. off.12B Kyiv 01001 Ukraine
+38 044 278 33 33
info@hlp.in.ua, www.hlp.in.ua
Film investment company providing the full cycle of film

production, from project development to distribution.

INSIGHT MEDIA
18 Budivelnykiv Str. off.2 Kyiv 02105 Ukraine
+38 044 230 00 01
insightmedia@ukr.net, www.firecrosser-film.com
Feature films production.

INSPIRATION FILMS
95A Mayakovskoho Ave. apt.72 Kyiv 02232 Ukraine
+38 044 533 29 93
szinow@gmail.com
An independent Production Company founded in 2002. The main focus is production of creative documentaries.

INQ PRODUCTION COMPANY
77 Saksahanskoho Str. Off.2 Kyiv 01033 Ukraine
+38 067 501 88 98
info@inq.com.ua, www.inq.com.ua
The company was founded in 2010 as a result of 5 years of film production activity in Ukraine and abroad.

ISTIL-A TANARM GROUP COMPANY
33 Tarasa Shevchenka Blvd. off. 10 Kyiv 01032 Ukraine
+38 044 220 15 70
www.istilgroup.com
The company is actively investing in fields of telecommunications (DTH TV/IPTV), media and entertainment, real estate, production of television content, production and distribution of films

KINOFABRYKA
8 Oliynyka Str. Kyiv 02068 Ukraine
+38 044 562 85 67
l_shato@mail.ru
Film manufacturer and distributor.

KINOPOST PRODUCTION
28 Saksahanskoho Str. off.5 Kyiv 01033 Ukraine
+38 044 222 53 53
info@kinopost.com.ua, www.kinopost.com.ua
Postproduction, visual effects studio.

KINOSVIT
15 Vorovskoho Str. off.18 Kyiv 04053 Ukraine
+38 044 495 24 00

info@kinosvit.com.ua, www.kinosvit.com.ua
Video editing, CGI.

KINOTUR COMPANY,
DIGITAL INTERMEDIATE LAB
1 Vasylkivska Str. Kyiv 03040 Ukraine
+380 44 207 30 00
producer@kinotur.ua, www.kinotur.ua
Kinotur company is the only DI facility in Ukraine offering end-to-end project finishing and mastering services for filmmakers.

KORABELNI ISTORIYI
17 Rayduzhna Str. off.82 Kyiv 02218 Ukraine
+38 044 360 94 58
kozakfest@gmail.com
Feature films production.

KYIVFILM
9 Hnata Yury Str. Kyiv 03148 Ukraine
+38 044 209 23 16
producer@kyivfilm.com
TV movies and feature films production, post-production, distribution, organizational assistance for filmmaking in Ukraine.

KYIV POSTPRODUCTION
29/31 Hlybochytska Str. Kyiv 04050 Ukraine
+38 044 568 50 23
producer@kpp.kiev.ua, www.kievpostproduction.com
Postproduction, VFX supervising, footage/photo bank.

MAGIKA FILM COMPANY
PO box 10964 Kharkiv 61013 Ukraine
+ 38 057 714 01 03, +38 050 597 49 27
gkofman@magikafilm.com.ua, www.magikafilm.com.ua
Independent Production Company based in Kharkiv, Ukraine. Produced animated cartoons and more than 30 documentaries.

MENTAL DRIVE STUDIO
2/1 Olhinska Str. off.16 Kyiv 01001 Ukraine
+38 044 279 39 42
contact@mentaldrivestudio.com
www.mentaldrivestudio.com
VFX shooting technology development, pre-visualization;

on-location / on-set VFX supervision, cartoon animation,
3D modeling and animation, photorealistic 3D rendering,
output to film.

NEW AGE IMAGES
31B Drahomanova Str. Kyiv 02068 Ukraine
+38 044 383 30 02
info.lab.nai@gmail.com
Digital shot-by-shot restoration of films and videos.

NEWMIX
31 Zhylyanska Str. Kyiv 01003 Ukraine
+38 044 461 14 04
ikovalskiy@newmix.kiev.ua, www.newmix.kiev.ua
Shooting (Kodak 35 mm, super 16 mm, DigiBeta, Betacam SP);
2D and 3D graphics; sound design; video and audio adaptations.

NOOSPHERE FILMS
10/2 Mechnykova Str. off.86 Kyiv 01133 Ukraine
+38 097 276 94 59
info@noospherefilms.com, www.noospherefilms.com
Full range of film production services: project development,
building up of a team, pre-production, production, postproduction.

NOVATORFILM
32 Vasylkivka Str. Kyiv 03022 Ukraine
+38 050 444 33 44
stopa@list.ru, www.novatorfilm.com
Animated films production.

PANAMA GRAN PRIX
31 Shchorsa Str. off.405 Kyiv 01033 Ukraine
d.belinski@pgprix.com, www.pgprix.com
Animated films production.

PATRIOT FILM
52/2 Peremohy Ave. Kyiv 03057 Ukraine
+38 044 4 555 999
info@patriotkinofilm.com, www.patriotkinofilm.com
Production of feature, documentary and short films.

PISTOLET FILM
10 Lunacharskoho Str. off.56 Kyiv 02002 Ukraine
+38 044 517 03 73
pistolet@pistoletfilm.com, www.pistoletfilm.com
Production of music videos and commercials. Postproduction.

PORTO-FRANCO FILM STUDIO LTD.
+38 050 490 48 02
firsenko@yahoo.com
Promotion of young independents projects and creation of modern action films; preproduction, production and post-production of feature, documentary, short films and music videos.

POSTMODERN POSTPRODUCTION
22 Zakrevskoho Str. Kyiv 02660 Ukraine
+38 044 536 94 31
info@postmodern.com.ua, www.postmodern.com.ua
Owns the biggest computer graphics and visual effects development studio, and provides the full cycle of postproduction services, including sound editing and coding in certified Dolby Premier Studio.

PRONTO FILM
10A Naberezhno-Khreshchatytska Str. off.1 Kyiv 04071 Ukraine
+38 044 490 22 31
info@pronto.kiev.ua, www.pronto.kiev.ua
Operates for more than 10 years providing the full cycle of services required for production of movies and commercials. The company has its own casting, location scouting, two editing stations, a warehouse of props and costumes.

PROPAGANDA HOUSE
1/35 Pyrohova Str. off.17 Kyiv 01030 Ukraine
+38 044 288 05 27
office@propagandahouse.com
www.propagandahouse.com
Video editing, CGI creation.

PROVIDEO
29 Moskovska Str. off.36 Kyiv 01010 Ukraine
+38 095 334 04 04
Guru_miss@bigmir.net, www.bogini.ua
Commercials, music video and documentary films production.

PSB FILMS
23 Velyka Vasylkivska Str. off.3 Kyiv 01004 Ukraine
+38 067 480 31 99

arnold.kremenchutsky@psbfilms.com
www.psbfilms.com
Production service in Ukraine.

RADIOAKTIVE FILM
29-31 Hlybochytska Str. 4th floor Kyiv 04050 Ukraine
+38 044 537 07 47
info@radioaktivefilm.com, www.radioaktivefilm.com
Produces commercials, feature films and music videos.
Shot more than 1000 commercials.

SHOOT GROUP&VIDEO PRODUCTION
9 Semena Sklyarenka Str. Kyiv 04073 Ukraine
+38 044 484 10 36, +38 050 462 03 68
tender@shootgroup.com.ua
www.shootgroup.com.ua
Video production (commercials, music videos, feature and corporate films, 3D and 2D graphics spots); photo production (advertising, art photography).

SKB BROTHERS
33B Olesya Honchara Str. Kyiv 01034 Ukraine
+38 044 240 03 27
korzachenko@skbbrothers.com.ua
www.skbbrothers.com.ua
A full service production house: post-production, 3D modeling and animation, original music and VO, film shooting (digital, 16mm, 35mm); film service and equipment rent; castings people/locations.

SOTA CINEMA GROUP
4 Khreshchatyk Str. off.12 Kyiv 01001 Ukraine
+38 044 278 60 19
cinema@sotacinema.com, www.sotacinema.com
Feature film production from the stage of development up to post-production and festival promotion since 2006. SOTA Cinema Group annually showcases new films from Ukraine at A-Class film festivals in Cannes, Berlin, Rome, Karlovy Vary, etc.

STAR IMAGE PRODUCTION
33, 2nd Bilomorska Str. Luhansk 91000 Ukraine
+38 642490864
sipr.ua@gmail.com, www.garnoukraine.com
The company specializes in creating multimedia content: from audio clips and commercials to production of feature

films, PR support and political projects.

STARMEDIA
15 Tumanyana Str. Kyiv 02660 Ukraine
+38 044 390 50 60
info@starmediafilm.ru, www.starmediafilm.ru
Leading producer and distributor of theatrical films, television movies, TV series, telenovelas and docudramas in the CIS. With a library of over 2,300 hours of programming, the group's production companies produce over 500 hours of telenovelas, over 100 hours of primetime series and dozens theatrical and television movies every year.

SUSPENSE FILMS
www.suspense-films.com
Production and postproduction services.

SVETOFOR FILM
26V Ivana Franka Str. off.11 Kyiv 01030 Ukraine
+38 044 234 50 73
company@svetoforfilm.com, www.svetoforfilm.com
Whole range of photo and video production, professional in-house casting and locations scouting.

TARASYUK RECORDS
13 Marshala Hrechka Str. Kyiv 04136 Ukraine
+38 098 286 46 41
sergey@trecords.com.ua, www.trecords.com.ua
Full service of sound production and sound design for Film & TV. Specializing on ADR, Foley recording, sound editing and mixing, DCP encoding.

TATOFILM
11 Urytskoho Str. apt.8 Kyiv 03035 Ukraine
+38 067 220 54 18
o.yershova@gmail.com, www.tatofilm.com
Tatofilm was created to work with promising filmmakers, among whom is Serhii Loznytsya.

TELECON STUDIO
6 Saksahanskoho Str. off.304 Kyiv 01033 Ukraine
+380 44 289 23 38
telecon@telecon.kiev.ua, www.telecon.kiev.ua
The studio creates TV programs and documentary series, and places TV products on TV-channels of Ukraine. The

studio has the world's largest archive of the accident at the Chernobyl nuclear power plant.

TERMINAL FX
44B Hlybochytska Str. Kyiv 04050 Ukraine
+38 067 505 03 80
roman@terminalfx.com, www.terminalfx.com
Video editing, CGI creation.

THEFIX@RADIOAKTIVEFILM
29-31 Hlybochytska Str. 4th floor, Kyiv 04050 Ukraine
+38 044 537 07 47
victor@fix-digital.com, www.fix-digital.com
Production of interactive video content, full technical expertise and interactive multimedia applications for the widest range of platforms.

THECOFFEEPOST
16 Kudryavska Str. off.11 Kyiv 04053 Ukraine
+38 044 223 26 90
info@thecoffeepost.com.ua, www.thecoffeepost.com.ua
Visual effects, 3D graphics and video editing for advertisement, music videos and film.

THUNDER FILMS PRODUCTION
Televiziyna Str. Dnipropetrovsk 49010 Ukraine
+ 380 056 788 99 33
mail@thunderfilms.com.ua, www.thunderfilms.com.ua
Production of short, musik video and commercials, feature films. 3D graphics, special effects.

TOY PICTURES
+38 044 494 44 54
info@toypictures.com.ua, www.toypictures.com.ua
Full production service in Ukraine, locations/casting references with rough budget are available upon request 24 hours a day.

TREMBITA-KINO
19 Patrisa Lumumby Str. Kyiv 01042 Ukraine
+ 38 067 402 33 33
ivankravchyshyn@gmail.com, www.trembita-kino.com
The company provides services of film production.

TWINJOINT
bogolyubova@twinjoint.com, www.twinjoint.com

International company that produces high quality entertainment for all theatrical & broadcast mediums and develops opportunities in film, entertainment and media fields. The company is based in Los Angeles with affiliate offices in Russia, Ukraine and Croatia.

UKRAINIAN MEDIA GROUP
44 Peremohy Ave. Kyiv 03057 Ukraine
+38 044 592 83 10
office@umg-film.com.ua, www.umg-film.com.ua
A production company that works in television market since 2004. One of the largest producers of television content in Ukraine, providing the full range of services in film and TV production.

UKRKINO
17/1 Horodetskoho Str. off.26 Kyiv 01001 Ukraine
+38 093 152 07 45
olga.zhurzhenko@gmail.com
Production of national Ukrainian short and feature films.

UKRTELEFILM
15 Tumanyana Str. Kyiv 02002 Ukraine
+38 044 292 44 80
studio@ukrtelefilm.com, www.ukrtelefilm.com
Production of TV movies.

WIZARDPOST
6 Yaroslavska Str. off.1 Kyiv 04071 Ukraine
+38 050 331 56 19
info@wizardpost.com.ua, www.wizardpost.com.ua
Video editing, CGI creation.