EUROPEAN AUDIOVISUAL OBSERVATORY

Proceedings of the workshop

"Film Information and Statistics"

held within the framework of the conference
"Audiovisual Policies and their Implementation in the European Union and Turkey"

organised by the Turkish Ministry of Culture

(Eskisehir, 4 April 2001)

Director of Publication:
Wolfgang Closs, Executive Director, European Audiovisual Observatory

Editor:
André Lange, Expert (Market information), European Audiovisual Observatory

EUROPEAN AUDIOVISUAL OBSERVATORY
76, allée de la Robertsau
67000 STRASBOURG
France

Tel.: +33 (0)388 14 44 00
Fax: +33 (0)388 14 44 19
URL: http://www.obs.coe.int
email: obs@obs.coe.int

FOREWORD

By Wolfgang Closs, Executive Director of the European Audiovisual Observatory

Mr Fikret Üçcan, Under-secretary of the Ministry of Culture, and current Chairman of the Executive Council of the European Audiovisual Observatory, invited the Observatory to organise a workshop on *Film Information and Statistics* within the framework of the conference *Audiovisual Policies and their Implementation in the European Union and Turkey* organised by the Turkish Ministry of Culture (Eskisehir, 4 April 2001).

The Secretariat of the Observatory welcomed this initiative: supporting the Member States by advising them on the methodological aspects of collection of information and statistics which is indeed an essential part of our organisation's mission and *raison d'être.*

The topic, the collection of statistical data on the audiovisual industry in Turkey, is not completely new for the Observatory. In June 1999, the Observatory had already presented to the Ministry of Culture a report on ***Organisation of the Collection of Statistics on the Audiovisual Sector in Turkey****.* The Eskisehir workshop's objectives were limited however to the film sector only, leaving aside the specific issues of broadcasting and video.

By virtue of its Statute, the Observatory has no normative mission. For this reason, our task is not to make recommendations in favour of one or other solution. Collection of information and of statistics in the field of the film industry is not an objective that can be resolved by the magic rhetoric of words. On the contrary, we observe that the data collection process is closely related to the organisation of the national systems and to the results of general film policy. We therefore thought it useful to introduce in Eskisehir our experience in the field of data collection and to explain why we believe that data collection has a certain strategic importance. We also thought it useful to give the floor to two national experts from countries with opposing, but efficient, models in terms of data collection: France and the Netherlands.

We were pleased by the Turkish participation in this event: the contributions of Mr. Baha Özyükseler and of Mr. Altug Isighan were particularly useful. More informal contacts with participants also helped us to identify complementary existing sources, in particular the trade magazine *Sinema*. Some of the data communicated after the conference will already be included in the 2001 edition of our Statistical Yearbook and made available in our LUMIERE database on admissions to films distributed in Europe.

We hope that this workshop and the proceedings will be useful for the Turkish authorities in their projects to improve data collection. We also consider that the proceedings of the Eskisehir workshop will be useful for other Member countries and for this reason, we are pleased to communicate these proceedings to the Executive Council and to the Advisory Committee.

Once again, I would like to thank Mr Üçcan for this initiative. I would also like to thank all participants for their contribution to this successful event.

Table of Contents

Film Information and Statistics

ESTABLISHING A FRAMEWORK FOR COLLECTION OF NATIONAL FILM STATISTICS

André LANGE
Expert (Market Information)
European Audiovisual Observatory

1. WHAT IS MEANT BY FILM STATISTICS?

Film statistics are constituted by a corpus of several sets of data:

- data on **film production**: number of films produced, sources of financing, average budgets, …
- data on **film distribution**: number and origin of films in distribution, P&A costs, number of copies, …
- data on **film exhibition**: number of theatres, number of screens, number of admissions, gross box-office, admissions and box-office figures for individual films, market shares by origin, by distributor, …
- data on **the structure of film audiences**: cultural practice and consumption, surveys detailing film attendance (by sex, age group, socio-professional category, level of education)…
- data on **the relationship between television and the film industry**: direct and indirect investments in film production by broadcasters, number and origin of films broadcast by television channels, audience for films on TV…
- data on **the video/DVD markets :** number of titles available for rental or in sell-through, distributors turnover (rental and sell-through), consumer expenditure (rental and sell-through), number of retail outlets, estimates of piracy,…
- data on **import/export:** financial value of imports and exports, success and circulation of national films in other countries,…
- data on **film companies:** financial information on companies in the various branches of the film sector (production, distribution, exhibition, sales, video, facilities,…) and the summary of those data by sector analysis; data on groups/types of companies and concentration of the market; data on employment,…
- data on **public support policies and their implementation:** value of public investments from national and regional authorities in support of the film industry, by kind of support,…

2. THE NECESSITY FOR FILM STATISTICS

There are various reasons for establishing a efficient national collection system for data on the film industry.

1. A comprehensive understanding of film market structures and dynamics is necessary for those in charge of regulating and co-ordinating systems of regulation and funding (national or local government, national agencies, professional organisations, for example). Effective systems can be achieved only on the basis of regular evaluation of the evolution of a certain number of indicators. The availability of comprehensive statistics on the film sector also enables cost-efficiency and cost–benefit analysis of public investments in the sector.

2. A correct understanding of market trends is necessary for both investors and other economic actors (producers, distributors, exhibitors,…).

3. A correct understanding of the success of films in the theatres, as well as in other market segments, is necessary for copyright owners.

4. More generally, a correct understanding of trends in import/export of film and audiovisual programmes and other copyrighted material is necessary for the Government Department responsible for National Accounts and for balance-of-trade accounts. Recent studies in the US and in Western Europe have demonstrated that the economic weight within the general economy of the copyright industry sector is far from negligible.

3. MODELS FOR ESTABLISHING AN OPERATIONAL STATISTICAL APPARATUS FOCUSING ON THE FILM INDUSTRY

Establishing an operational statistical apparatus focusing on the film industry should not be considered as an abstract operation. The history of the national market, the nature of state film policy and the structural organisation of the various professional branches of the industry must all be taken into consideration.

This can be illustrated by the various models existing in Europe. The following typology is a simplified presentation of reality, in the sense that there is no "pure situation".

1. The public centralised model

In various countries the State, by the intermediary of Film Centres or Film Institutes, undertakes the collection of data and the production of statistics. This kind of data collection operation is highly correlated to the existence of interventionist policies (in terms of both regulation and public funding) in favour of the film industry. In this model Film Centres or Film Institutes organise data collection.

The *Centre national de la cinématograhie* (CNC) in France and the *Instituto de la Cinematografía y de las Artes Audiovisuales* (ICAA) in Spain are good examples of this kind of system.

In this model, regular consultation with professional organisations is undertaken, with a view to creating new analytical tools when necessary. For example, the CNC has created an "*Observatoire de l'exploitation*" to monitor the effects of the creation of multiplexes.

2. The public decentralised/outsourced model

In some countries, the Ministry responsible for film policy, or the relevant Film Institute, collects only part of the data and delegates the collection of the remaining data to various professional organisations, copyright societies, national statistics institutes and private consultancy companies.

Some examples:

- Outsourcing to private entities: in Italy, the *Dipartimento dello Spettacolo* delegates the monitoring of box-office and admissions to a copyright society (SIAE), and the monitoring of production and distribution to an inter-branch organisation (ANICA);
- Inter-administration service provision: in Denmark and Finland, the respective Film Institutes delegate the monitoring of box-office and admissions to the National Statistics Office;

- Networking of primary sources: in the French Community of Belgium, the relevant Ministry publishes a Statistical Yearbook, edited by an expert in the Ministry, but largely dependent on other sources (Statistical Institute, trade press,…).

3. The professional-focalised model

In this model, the organisation of data collection is mainly in the hands of inter-branch professional organisations, with some occasional support provided by the competent Ministry.
Two very satisfactory examples of this model are provided by Germany and the Netherlands, where the inter-branch professional organisations (respectively SPIO and NFC) publish yearbooks or "Facts and Figures" brochures.

One other important example is the United States, where most of the data (except that concerning exhibition) is compiled by profesional organisations (MPAA and AFMA). MPAA and AFMA also collect data on exports, but the MPAA does not publish them.

A sub-category of this model is the situation where the national distributors' association - frequently under the hegemony of US major companies - are the only existing sources for data related to distribution and exhibition. In this case the quality and facility of access to the data is largely dependent on:

- the willingness of exhibitors to communicate data to the distributors' association

- the willingness of the distributors' association to communicate data to the Ministry (or to the trade press, …).

Examples of this situation may be found in countries like Switzerland, Norway, the Baltic countries, Poland, Bulgaria, the Czech Republic,….)

4. The trade press/consultancy companies focalised model

In some countries (the United Kingdom, Ireland, Russia), there are almost no sources of data other than the trade press or private consultancy companies.

In countries like Belgium, Italy, the United Kingdom and the US, the trade press or private companies are the only sources of information on box-office and admissions for individual films.

CONCLUSIONS

The European countries provide examples of diverse models of film data collection. The European Audiovisual Observatory respects this diversity and has now seven years of experience in dealing with widely varying models. It seems more efficient to accommodate to diversity, resulting from the historical development of the film policy and the film industry in each country, rather than trying to propose an ideal model that will either be refused or simply not implemented by certain countries.

In this sense, the European Audiovisual Observatory is not in a position, nor would wish, to make recommendations on the model that a Member State should adopt. Such a decision is the joint responsibility of Member States and of their national profesional organisations.

However, we can indicate the criteria for efficiency and reliability in national systems:

- the data collection system should be elaborated in collaboration between:
  - the responsible public authorities (Ministry, Film Centre or Institute),
  - the relevant professional organisations (inter-branch organisations and organisations representing producers, film distributors, video distributors, exhibitors, filmmakers and facilities companies,…),
  - relevant copyright organisations,
  - the National Statistics Institute,
  - experts in audiovisual economy matters (specialised university departments, private consultants specialising in the media, and journalists),

- the broadcasting regulatory authority (which may take responsibility for the monitoring of films broadcast by television channels).

- the system should be based on a clear methodological framework, agreed by the various parties. In countries where no such framework exists, the Observatory advises that an expert be named to undertake an initial preparatory and feasibility study. The resulting report can then be used as a guideline for public authorities and professional organisations in the creation of a system viable in the long term.

- the system should be efficient: statistical data in the film industry is useful only if made available rapidly.

- the system should be transparent and public: data should be published through the trade press, a statistical yearbook or on an Internet web site,

- the system should allow international access (i.e. reports should be published not only in the national language but also in another ‘international’ language).

OBSERVATOIRE EUROPÉEN DE L'AUDIOVISUEL
EUROPEAN AUDIOVISUAL OBSERVATORY
EUROPÄISCHE AUDIOVISUELLE INFORMATIONSSTELLE

ANDRE LANGE
Expert (Market information)

FILM STATISTICS : A BASIC REQUIREMENT TO UNDERSTAND THE EUROPEAN FILM MARKET

WHAT IS MEANT BY FILM STATISTICS ?

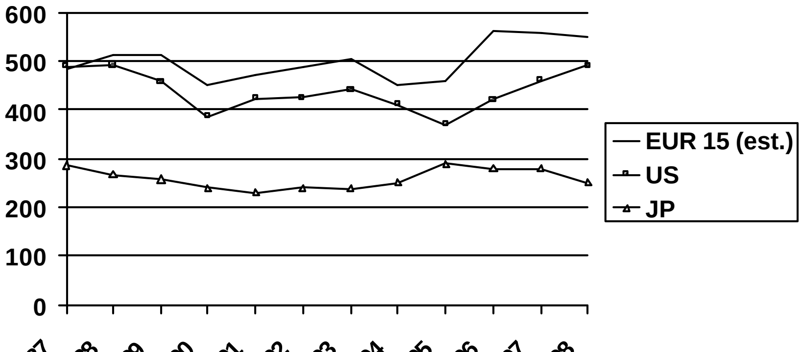
- **Data on film production**
- **Data on film distribution**
- **Data on film exhibition**
- **Data on the structure of film audiences**
- **Data on the film and television relations**
- **Data on the video / DVD / CDV / DVD markets**
- **Data on import / export**
- **Data on film companies**
- **Data on public support policies**

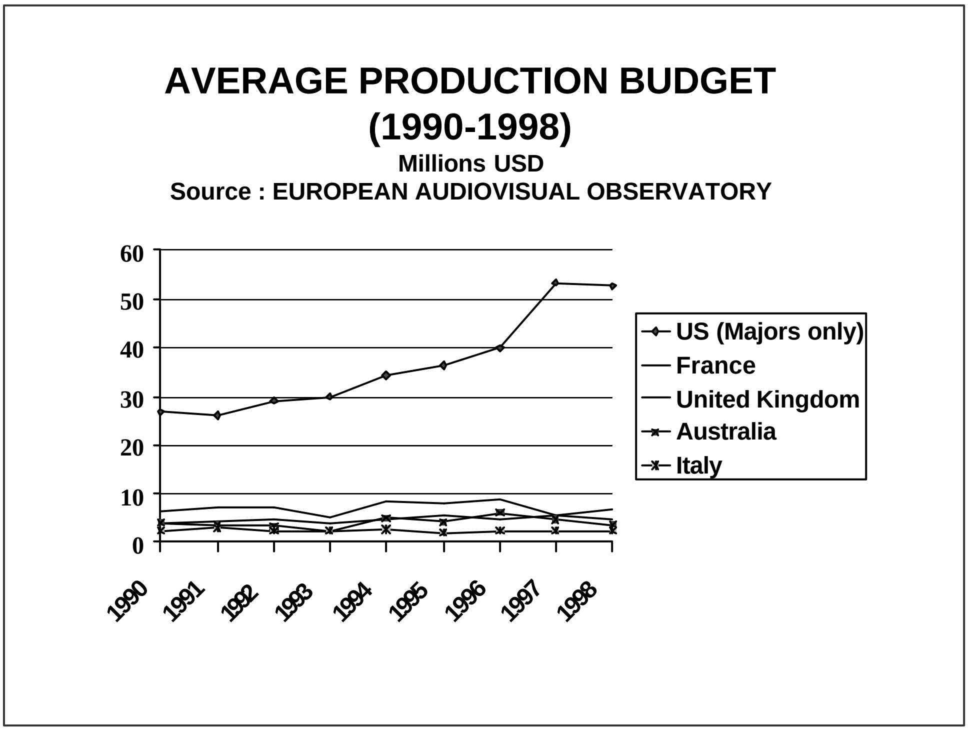
THE NECESSITY FOR FILM STATISTICS

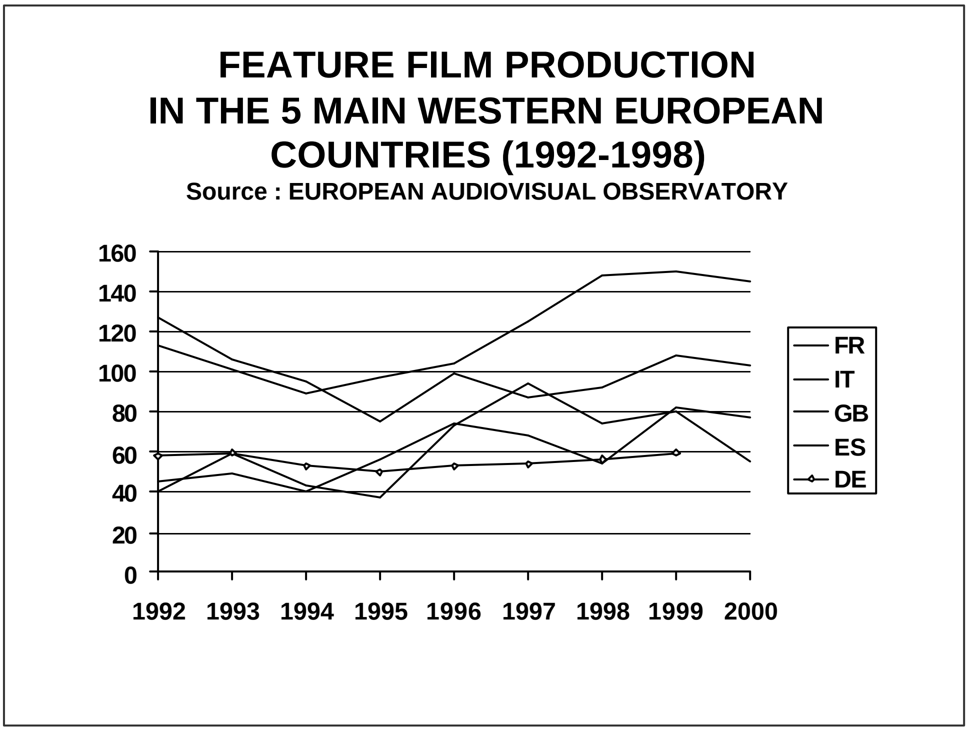
- **A need for those in charge of organising the system (public authorities, professional organisations)**
- **A need for investors and other economic players**
- **A need for copyright owners**
- **A need for undersatnding trends in import/export**

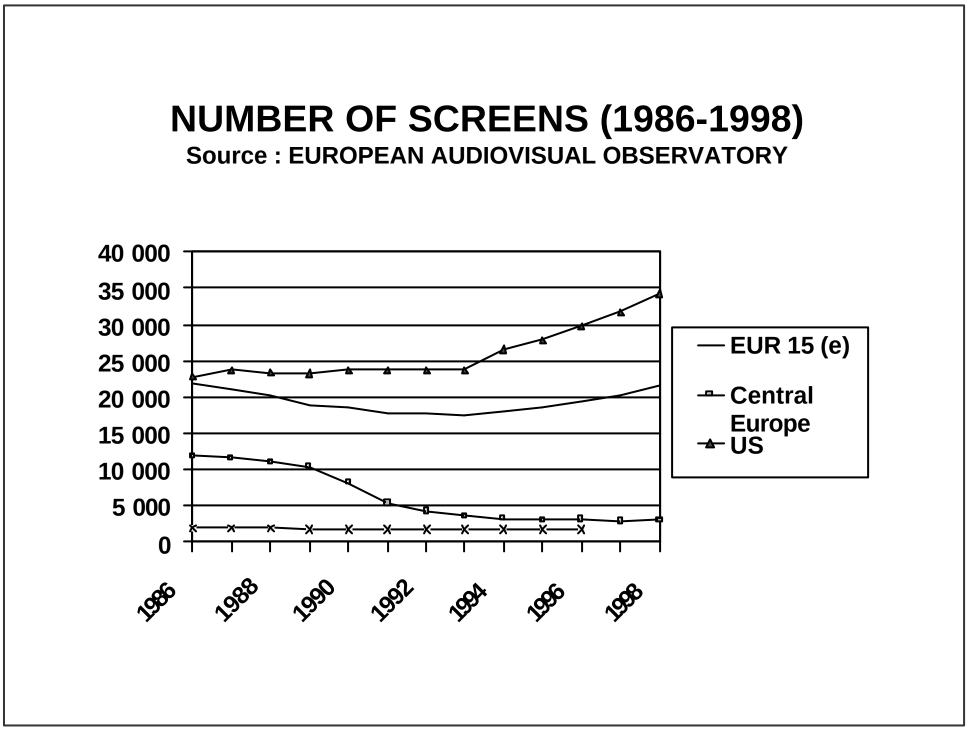
PRODUCTION OF FEATURE FILMS (1987-1998)

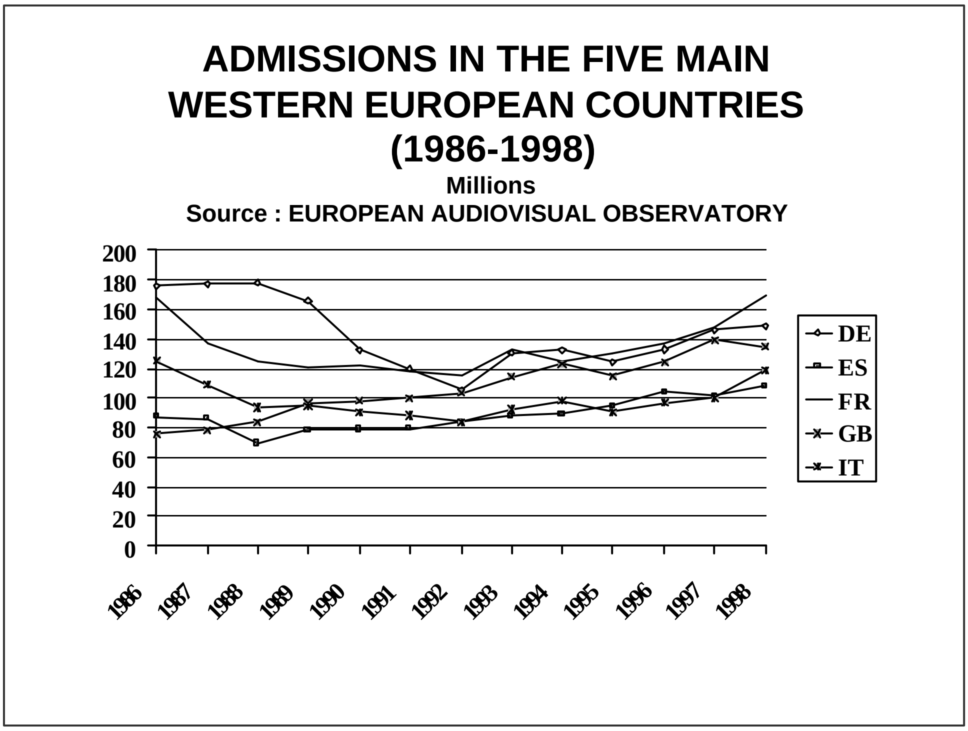
Source : EUROPEAN AUDIOVISUAL OBSERVATORY




AVERAGE PRODUCTION BUDGET
(1990-1998)
Millions USD
Source : EUROPEAN AUDIOVISUAL OBSERVATORY
60
50
40
30
20
10
0
1990
1991
1992
1993
1994
1995
1996
1997
1998
US (Majors only)
France
United Kingdom
Australia
Italy

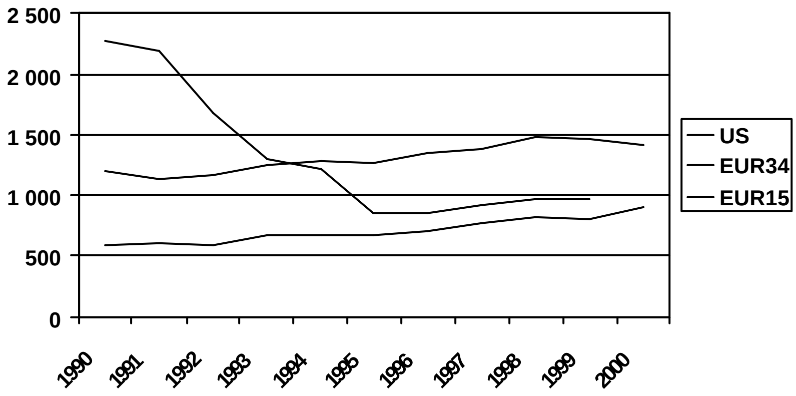

FEATURE FILM PRODUCTION
IN THE 5 MAIN WESTERN EUROPEAN
COUNTRIES (1992-1998)
Source : EUROPEAN AUDIOVISUAL OBSERVATORY
160
140
120
100
80
60
40
20
0
1992
1993
1994
1995
1996
1997
1998
1999
2000
FR
IT
GB
ES
DE


NUMBER OF SCREENS (1986-1998)
Source : EUROPEAN AUDIOVISUAL OBSERVATORY
40 000
35 000
30 000
25 000
20 000
15 000
10 000
5 000
0
1986
1988
1990
1992
1994
1996
1998
EUR 15 (e)
Central Europe
US


ADMISSIONS IN THE FIVE MAIN WESTERN EUROPEAN COUNTRIES (1986-1998)
Millions
Source : EUROPEAN AUDIOVISUAL OBSERVATORY
200
180
160
140
120
100
80
60
40
20
0
1986
1987
1988
1989
1990
1991
1992
1993
1994
1995
1996
1997
1998
DE
ES
FR
GB
IT

NUMBER OF ADMISSIONS IN EUROPE AND USA (1990-2000) (in millions)

Source : European Audiovisual Observatory



http://lumiere.obs.coe.int

HISTORY OF THE PROJECT "LUMIERE"

- Request from the Advisory Committee in 1996
- Other requests from MEDIA II, Eurimages, professionals, journalists
- Feasibility study and workshop in 1997
- Experimental phase during 1996-1999
- Summer 2000 : development of a dedicated software
- 13 November 2000 : Official launch on-line

FUNCTIONS OF THE DATA BASE LUMIERE

- To provide transparency on film admissions for the copyright owners
- To provide transparency on film admissions for public bodies supporting the film industry
- To provide marketing tools for professionals
- To provide further tools for film market analysis
- To provide tools for evaluation of the market values of films and film libraries

METHODOLOGY

- **Systematic collection from national sources of admissions (for civil years only)**
- **Identification of films (original title, titles in main other languages, name of director, country of production or co-production, year of production)**
- **For GB and US : conversion from box-office financial data to admissions physical figures**
- **Transparency of sources**
- **Provision of contradictory figures**

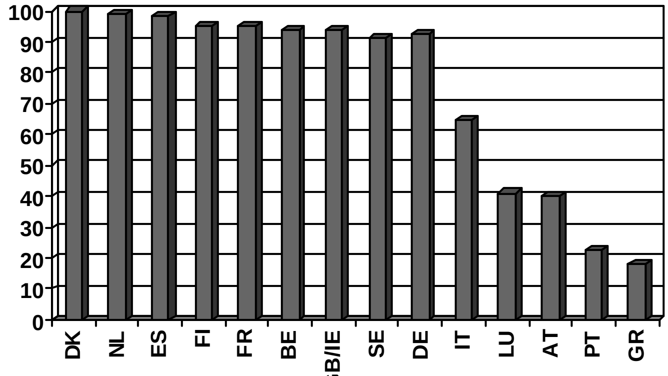
SOURCES

- ***NATIONAL FILM CENTRES* : BG, DE, DK, EE, ES, FI, FR, HU, LU, LV, NO, PL, RO, SE**
- ***NATIONAL STATISTICS OFFICE* : FI, IS**
- ***INTERPROFESSIONAL ORGANISATIONS* : DE, NL**
- ***AUTHORS' RIGHTS ORGANISATION* : IT**
- ***EXHIBITORS' ASSOCIATIONS* : AT, IT**
- ***DISTRIBUTORS' ASSOCIATIONS* : CH, CZ, NO, SI, SK, TR**
- ***PRIVATE COMPANIES* : GB, IE, US**
- ***TRADE PRESS* : BE, FR, GB, US**
- ***NO REGULAR SOURCES* : CY, GR, LT, PT, RU**
- **COMPLEMENTARY SOURCE : MEDIA II PROGRAMME**

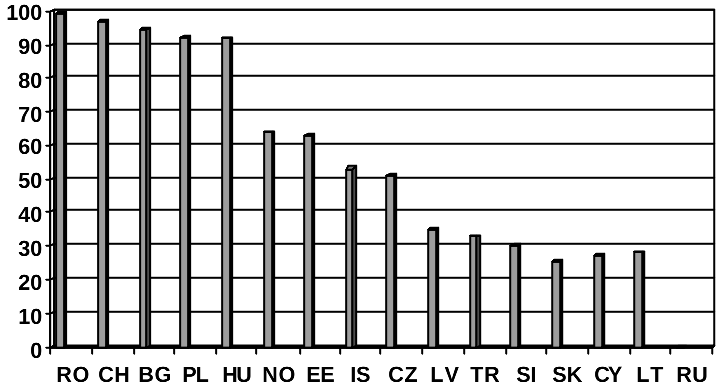
DATA BASE LUMIERE
CONTENT AS AT 15.03.2001

- Period : 1996-2001
- Data on 27 European markets + US market
- 7400 films of 70 countries by 4000 directors
- 10,5 billions of admissions (3,7 billions in Europe, 6,8 billions in US)
- Rate of coverage : EUR 34 : 78 %,
  EUR 15 : 85 %
  US : 96 %

AVERAGE RATE OF COVERAGE OF THE DATA BASE LUMIERE (1996-2000)



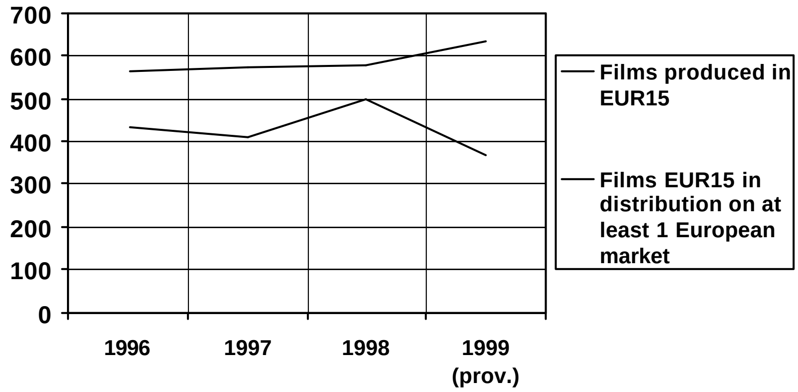
AVERAGE RATE OF COVERAGE OF THE DATA BASE LUMIERE (1996-1999)



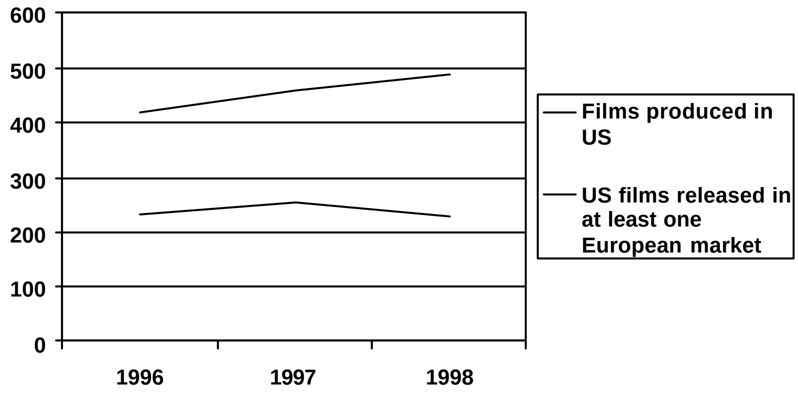
A NEW TOOL FOR MARKET ANALYSIS

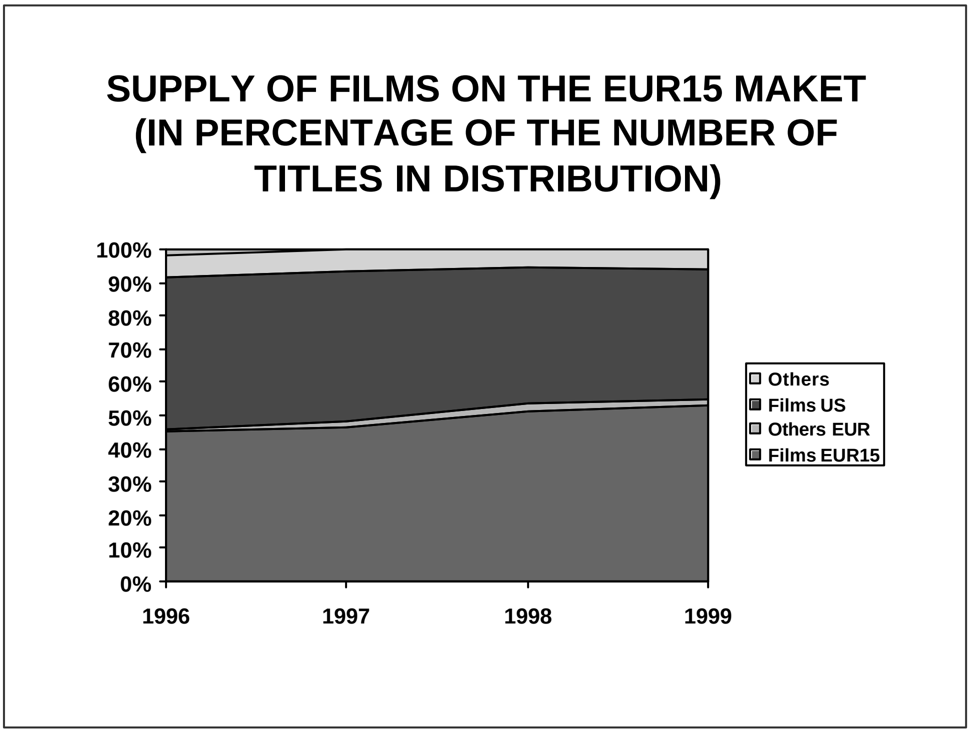
- **LUMIERE provides various statistical functions :**
- **Number of films with an observable distribution**
- **Market shares (including market shares of co-productions)**
- **Concentration of films by "success slides"**
- **Ranking of films by admissions with detailed breakdown by country**
- **Graphic function for the breakdown by country of admissions on the EU market**

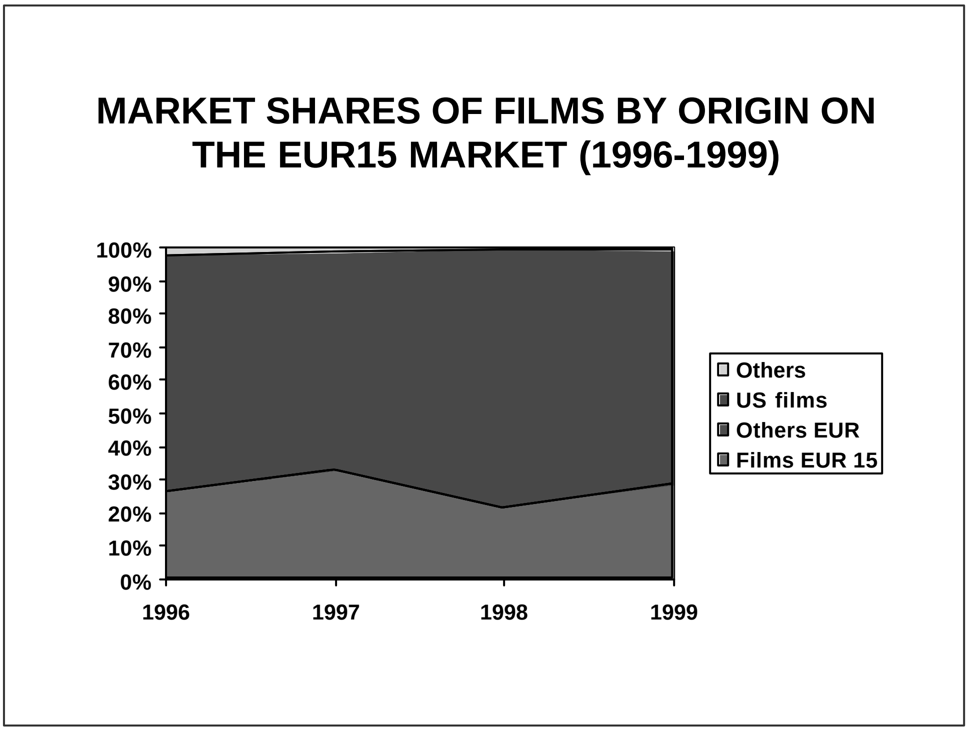
ONE EUROPEAN FILM ON FOUR HAS NO COMMERCIAL DISTRIBUTION IN EUROPE (including in its own country of production)



ONLY HALF OF THE US FILMS ARE RELEASED IN EUROPE




SUPPLY OF FILMS ON THE EUR15 MAKET (IN PERCENTAGE OF THE NUMBER OF TITLES IN DISTRIBUTION)
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
1996
1997
1998
1999
Others
Films US
Others EUR
Films EUR15

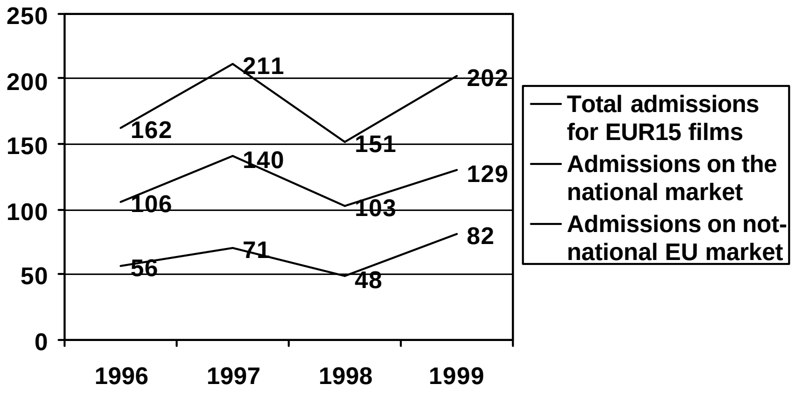

MARKET SHARES OF FILMS BY ORIGIN ON THE EUR15 MARKET (1996-1999)
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
1996
1997
1998
1999
Others
US films
Others EUR
Films EUR 15

CONCENTRATION OF FILMS BY SUCCESS SLIDES (Admissions on the market EUR34 + US) 1996-1999)

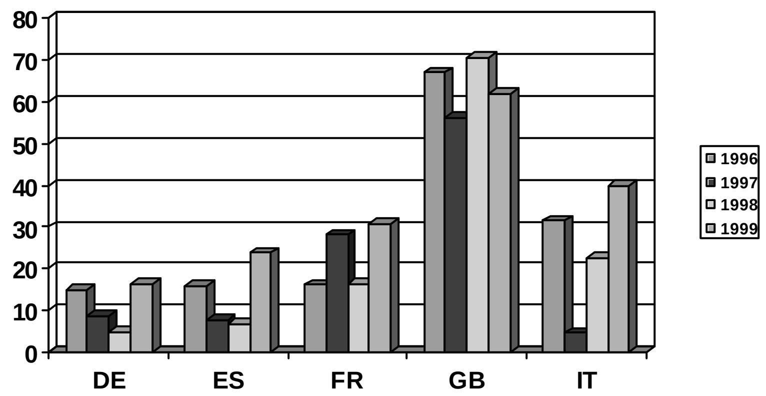
succès 1996-1999 sur marché EUR 34 + US

	Films EUR 15	Cumul	Films US	Cumul
> 50 M	1	1	18	18
25 M - 50 M	6	7	53	71
20 - 25 M	2	9	24	95
15 - 20 M	1	10	40	135
10 - 15 M	3	13	58	193
5 - 10 M	17	30	122	315
4 - 5 M	11	41	38	353
3 - 4 M	19	60	56	409
2 - 3 M	19	79	58	467
1 - 2 M	58	137	86	553
500 000 - 1 M	126	263	66	619

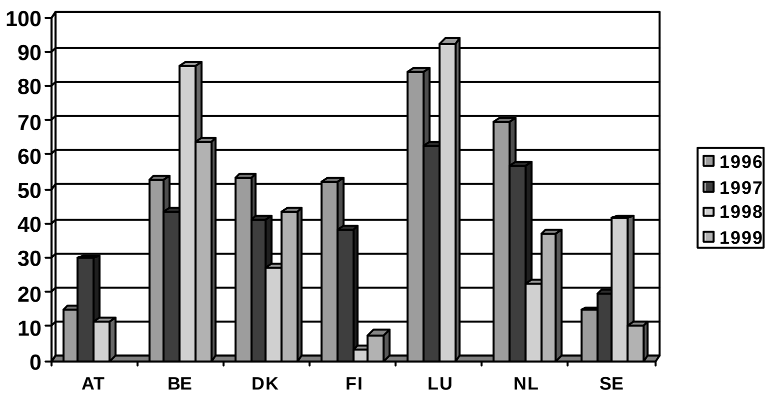
ADMISSIONS FOR EUR15 FILMS ON THE EU MARKET (1996-1999)



EXPORT RATIO
(ADMISSIONS ON OTHER EU MARKETS AS A PECENTAGE OF THE TOTAL EU ADMISSIONS REALISED BY THE FILMS OF A GIVEN COUNTRY)



EXPORT RATIO
(ADMISSIONS ON OTHER EU MARKETS AS A PECENTAGE OF THE TOTAL EU ADMISSIONS REALISED BY THE FILMS OF A GIVEN COUNTRY)



How are film statistics produced in France ?

Benoît DANARD
Head of the Reseach and Statistics Department

April 4th 2001

1

Why are film statistics necessary ?

- Firstly, statistics are necessary for film companies to have a correct understanding of the market and to anticipate the evolution of the film industry.
- For example, producers and distributors in the film industry need to have the exact admissions figures for their films to control revenue. They need to know the exact amount of receipts.

2

Why are film statistics necessary ?

- Secondly, if the government of a country wants to develop a cultural policy, it needs information on national film and audiovisual industry to fix its policy. For example most governments look carefully at the market share of national films.
- In France all statistics produced by the CNC are used by the CNC and the government in drawing up their annual action plan. With this data they can intervene at the right time, in the right market segment, in order to develop the French programme industry.

CNC 3

Why are film statistics necessary ?

- Statistics are also necessary for all types of economic analyses: by public research departments, by universities and by marketing departments of private companies.
- Statistics provide data for companies planning to invest in a market, in order to evaluate the possible economic potential.

CNC 4

Must statistics be published ?

- To reinforce the economic power of statistics, they must be published regularly (even if they reflect negatively on national industry).
- In France the CNC publishes each year a complete annual report with comprehensive statistics on the film and audiovisual industry during the previous year.
- The annual report of the CNC is presented to professionals and journalists at the Cannes festival. The CNC also publishes monthly statistics on admissions.

5

Must statistics be published ?

- The CNC publishes each year a complete report on French film and audiovisual production.
- The CNC also publishes a number of economic studies on the film industry and film markets to help French companies in their development strategy.
- CNC statistics are available to everyone on the CNC web site (cnc.fr) and in free paper publications.

6

What kind of statistics ?

- CNC statistics cover the entire process of film production and all of the film industry. The CNC produces statistics on :
- French film production
- Admissions to cinemas
- Film distribution
- Film exportation
- Film on TV
- Film on video

CNC

7

What kind of statistics ?

- CNC produces statistics on :
- French television production of fiction (drama, series..), animations and documentaries,
- Exports of French television programmes.

- Statistics on CNC activities and it’s funding system.

CNC

8

How are the statistics collected?

- Most of the statistics come from administrative procedures managed by CNC.
- For example when a producer asks the CNC for support he has to provide some economic information, on his production budget for example.
- Some statistics are collected as a result of tax collection procedures, such as the number of admissions to cinemas.

9

How are admission statistics collected ?

- Each week each exhibitor who is involved in the French market provides statistics to the CNC via his declaration of taxes.
- The transmission of this information is required by French law on the film industry (dated 1946).
- If the exhibitor does not transmit the necessary information the CNC has a power of sanction.
- To start trading,both an exhibitor and a film producer need a licence from the CNC.

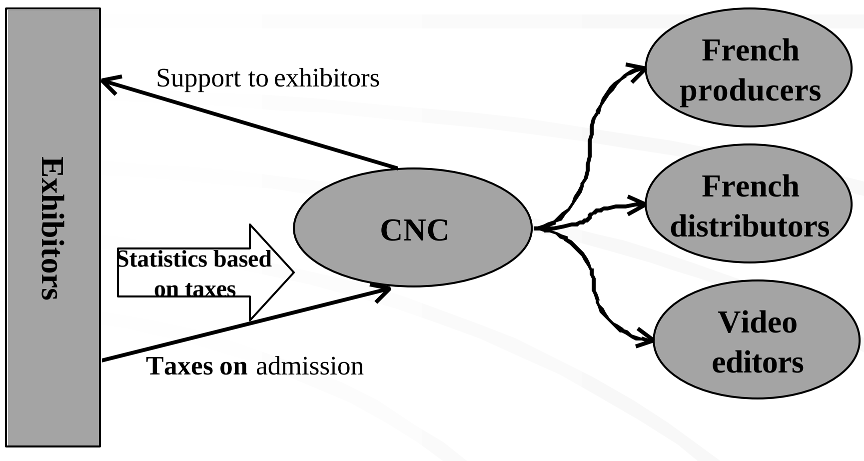
10

Why exhibitors provide statistics

- In fact, it is in the economic interest of the exhibitor to provide information to the CNC.
- With these statistics the CNC will calcutate the exact amount of support that the exhibitor will receive.
- Those statistics will also determine the exact amount of taxes that the exhibitor will have to pay to the CNC.
- The information provided for each film will determine the amount of support for the producer, the distributor and the exhibitor.

11

Why exhibitors give statistics ?



- Statistics are based on a specific tax

- Statistical results determine the amount of support

12

What kind of information does the CNC collect on admissions ?

- When a film is projected on a screen in a cinema during a week (even a single screening) the exhibitor must complete and transmit a weekly report note (‘bordereaux’) with :
- the title of the film and his register number (« Visa » number),
- the numbers of the tickets,
- the number of admissions and the ticket price,
- the screen where it was projected,
- the number of sessions for the film,
- the income of the film during the week.

13

Information on admissions permits evaluation of tax on admissions

- Last year the CNC received 480 000 weekly report slips (‘bordereaux’) from more than 2000 exhibitors. In addition the largest exhibitors transmit electronic report slips on computer disks.
- The weekly report slips are registered in an electronic database from which the CNC can extract statistics.
- The information is used to collect the taxes due from each exhibitor.

14

How is control of the information organized ?

- The CNC has a department staffed by official agents in charge of the implementation of the law on declaration of ticket sales/receipts by cinemas.
- Official agents of CNC perform on-the-spot checks in cinemas to verify that the legal procedure has been applied.
- They check that the number of tickets that has been sold is identical with the number declared.
- They compare the weekly report slips transmitted to the CNC and the remaining stocks of tickets because the CNC knows exactly the number of tickets that each exhibitor has used.

15

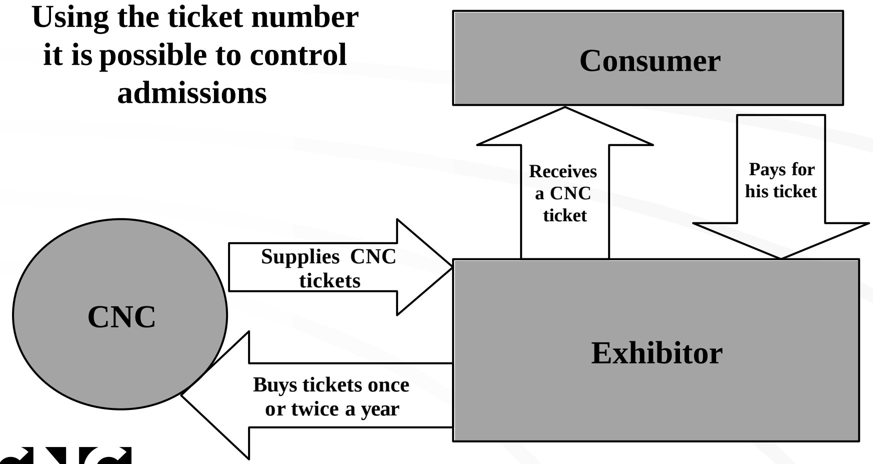
How is control of the information organized ?

- They compare the report slip transmitted to the CNC and the remaining stock of tickets because the CNC knows exactly the number of tickets that each exhibitor has used.
- Because the CNC sells the ticket paper to the exhibitor.
- It is possible to verify if sales of tickets corespond to the admissions declared.

16

Each ticket is numbered

Using the ticket number it is possible to control admissions



17

Economic results of statistics

- The statistics from admissions are used to fix the amount of support that the producer of the film will be able to receive for his next film.
- More admissions per film = more support
- Producers may qualify for allocations from the automatic support fund on the basis of their films' box office results.
- The statistical results are used to calculate the automatic support for the producer's next feature film.

18

Dutch Federation for Cinematography

- **Umbrella organization for unions of producers, distributors and exhibitors – NFC is financed by their contributions**

- **NFC supports the industry by services and by maintaining relations with policy makers and other stakeholders**

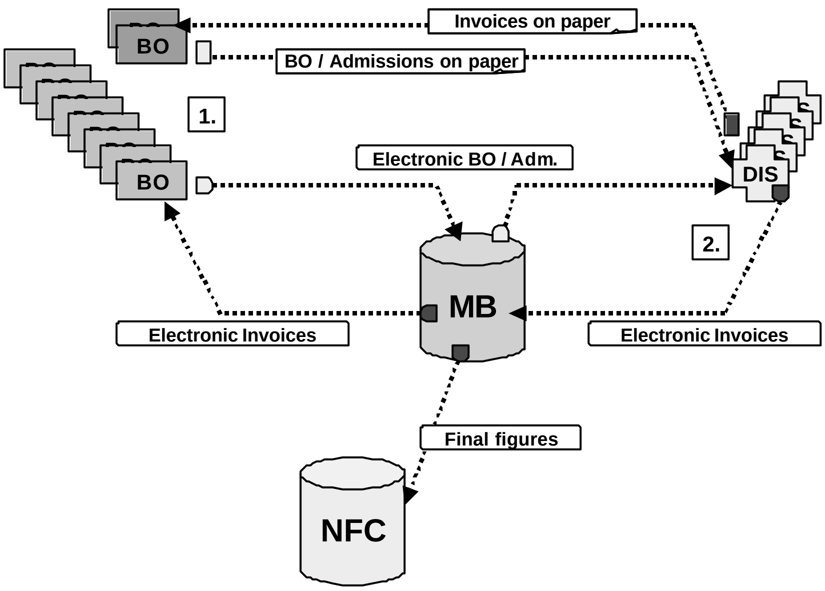
Film statistics in the Netherlands

- **No governmental initiatives were developed in administrating BO's and admissions**

- **The industry decided to implement computerized BO registration and billing for exhibitors and distributors**

- **The NFC developed new services on central billing, as well as statistics and research**

Communicating transaction info – basic scheme



Basic figures for the Netherlands

	1997	1998	1999	2000
Gross Box Office (mln Euro)	105,4	116,5	104,6	128,4
Admissions (mln.)	18,9	20,1	18,6	21,6
Population (mln.)	15,6	15,7	15,8	15,9
Admission per capita	1,21	1,28	1,18	1,36
Average ticket price (Euro)	5,58	5,79	5,63	5,95
% GBO of Top 20 films	56,9	60,9	52,4	48,0
New releases	227	232	247	272
idem with minimum of 10 prints	94	105	118	134
average amount of prints per title	19,8	22	21,9	23,3
cinemas*	156	154	149	150
screens	444	461	461	502
seats (x 1000)	89	92,7	92,7	100
average nr. of screens per cinema	2,8	3	3,1	3,3
average nr. of seats per screen	200	201	201	199

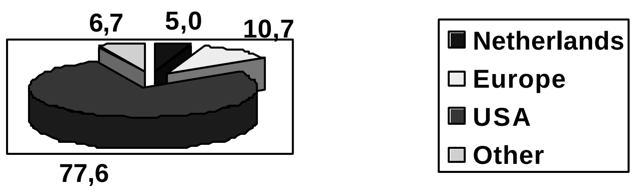
* in 2000 there were 31 municipal cinemas with 60 screens and 5200 seats - not included

Film releases in the Netherlands

	1997	1998	1999	2000
Number of released titles	227	232	247	272
Of which Dutch releases	28	34	30	34
Of which Dutch feature films	13	22	22	23
Admissions all films (x mln)	18,9	20,1	18,6	21,6
Admissions Dutch releases	0,6	1,1	0,6	0,4
Admissions Dutch feature films	0,6	1,1	0,6	0,4
Admissions all Dutch films screened	0,7	1,2	1,0	1,1
Gross BO all films (x mln Euro)	105,4	116,5	104,6	128,4
Gross BO Dutch releases	3,2	3,2	3,2	2,3
Gross BO Ducth feature films	2,7	3,2	2,7	2,3
Gross BO all Dutch films screened	3,6	6,4	5,0	6,4

Market shares nationalities / GBO, 2000

	Titles	Prints	% all prints	MS all films
Netherlands	34	256	4,0%	5,0%
Europe	92	985	15,5%	10,7%
USA	125	4 820	76,0%	77,6%
Other	21	285	4,5%	6,7%
Total	272	6 346	100,0%	100,0%



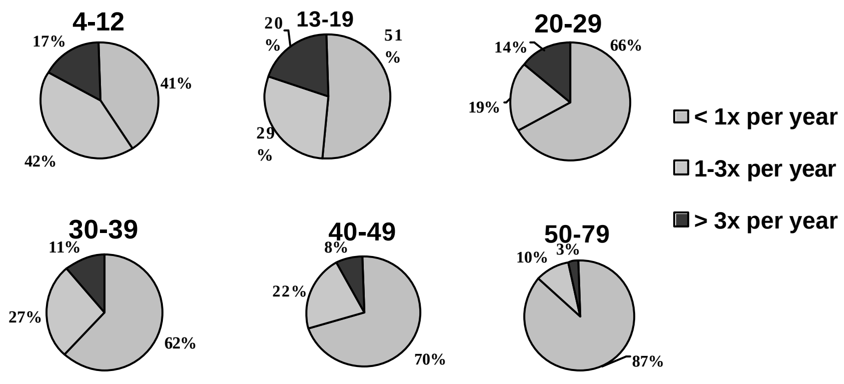
Film research by the NFC

• Evaluative research (NFC services, marcom actions and campaigns)

• Analyses of aspects of the industry (differences in interests of business partners involved)

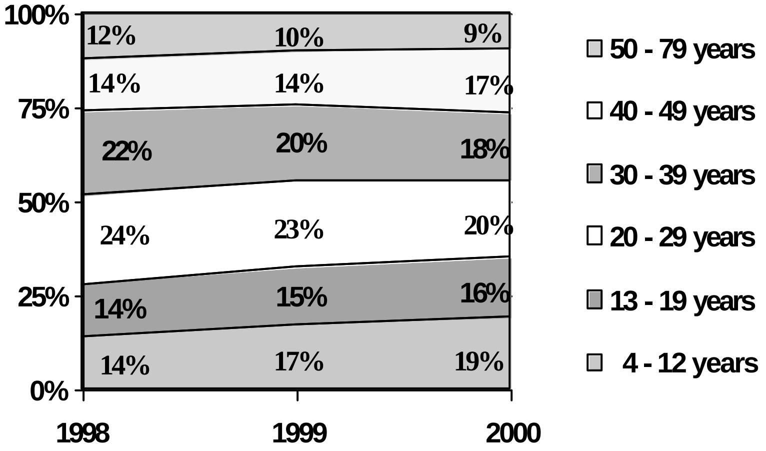
• Marketing research (monitoring audiences, mapping out the demand side)

Frequency of cinema attendance



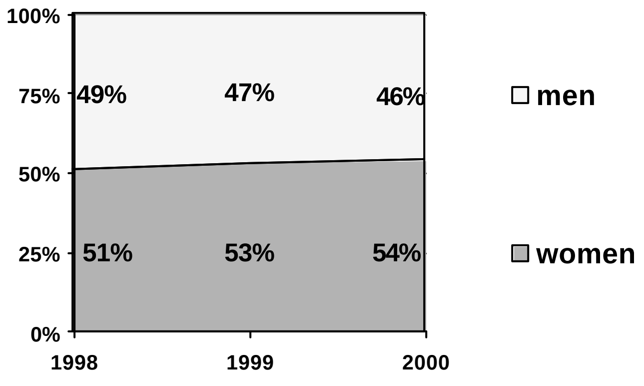
source: NFC/NIPO

Total audience – shares by age groups



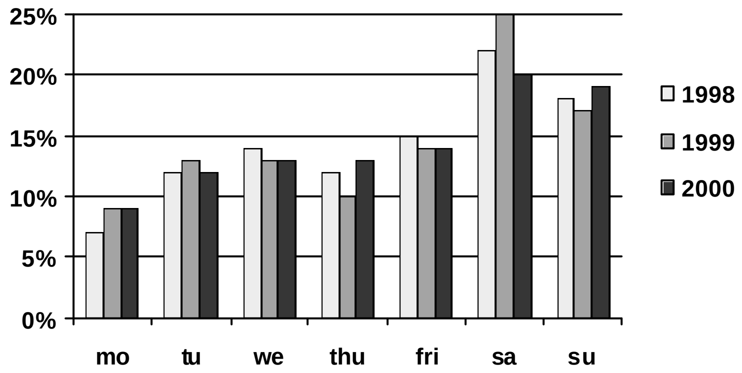
source: NFC/NIPO

Total audience – shares by gender



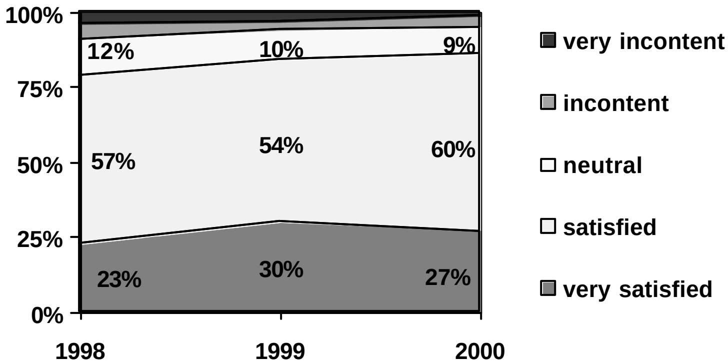
source: NFC/NIPO

Total audience – shares by days



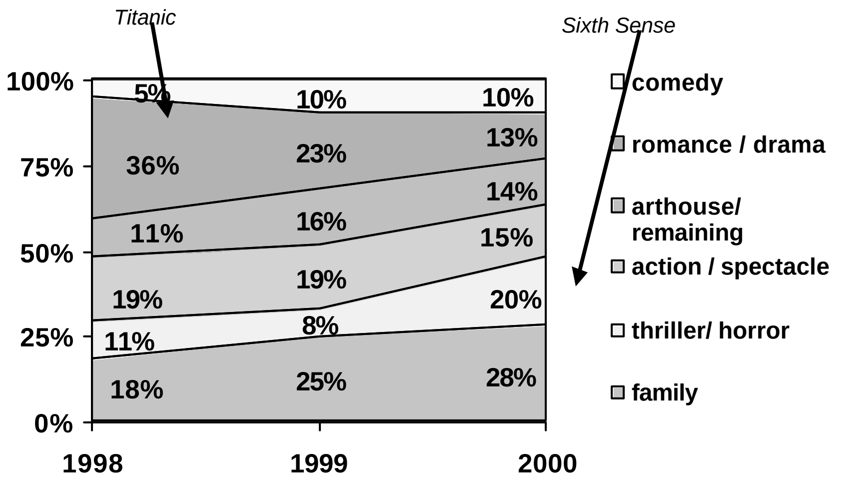
source: NFC/NIPO

Total audience – shares by satisfaction



source: NFC/NIPO

Total audience – shares by filmgenre



source: NFC/NIPO

Looking ahead

- **Film statistics**
  - **keeping up and synchronzing**
  - **sharing knowledge on procedures**
  - **finetunig available data - datamining**
- **Film research**
  - **continuing evaluative research**
  - **continuing internal analyses**
  - **expanding marketing research**

1995-1997 Yılları Arasında Türkiye'de Sinema Sektörü

Gösterim Alanında Yaşanan Gelişmeler Hakkında İstatistikler Işığında Bir Değerlendirme

İ. Altuğ Işığan[1]

Giriş

Bu yazı, 1998 yılında tamamladığım ve 1990'lı yıllarda Türkiye'de sinema sektörünün gelişimini inceleyen yüksek lisans tezinde elde ettiğim verilere dayanıyor. Ele alacağım konu, bu istatistikler çerçevesinde çözmeye çalışacağım bir bulmacadır. Bu bulmacaya dair sunacağım çözüm, öyle umuyorum ki, sadece istatistiklerin değil, onların yorumlanmasının önemine de dikkat çekecektir.

I- Paradoksal bir Durum: Salonlar çoğalırken, koltuk sayısı azalıyor.

Sinema İşletmeleri Sahiplerine ilişkin 1995 ve 1997 yıllarında yayınlanan istatistik ağırlıklı iki ayrı raporda[2], şöyle bir durum saptanmış: Türkiye'de sinema salonu sayısı artarken, koltuk sayısı azalıyor. *Bu paradoksal görünen bir durum, zira salon aynı zamanda koltuk da demek olduğundan, salon sayısı artıyorsa koltuk sayısının da artması gerekiyor.* Raporları yayınlayanlar da duruma bir açıklama getiremiyor ve sonuçta her ne kadar koltuk sayısının azalması gibi tuhaf bir durum varsa da, salon sayısının artışının sevindirici olduğunu belirtmekle yetiniyorlar.

Bu bulmacanın içinden çıkılmazmış gibi gözükmesinin nedeni nedir? Verilebilecek ilk ve en önemli yanıt, ki bu yanıt sempozyum konumuz yani istatistiklerle yakından ilgilidir, *fazlasıyla geniş tutulan kategorilerin ve bunlardan elde edilen istatistiklerin analitik bir yaklaşım açısından sınırlı bir fayda sağladıklarıdır.* Diğer bir deyişle, "Türkiye Sinemaları" gibi bir kategori, analitik-betimleyici bir çalışma için yeterli bir işlevselliğe sahip değil. Böyle bir kategori, birincisi, bölgesel farklılıkları ve eşitsizlikleri gizliyor. İkinci olarak, genel gibi gözüken eğilimlerin arkasında yatan dinamikleri ve aynı sürecin doğurduğu karşıt eğilimleri görünmez kılıyor. Sonuç olarak, bu denli geniş bir kategori, anlamlı açıklamaların yapılmasını önlüyor ve tek bir verinin bütünden soyutlanarak, olumlu yorumlara bir Arşimet noktası yapılmasına izin veriyor. Böylece de salon sayısının artmasını sevindirici bulmaktan başka seçenek kalmıyor. Oysa koltuk sayısındaki azalma önemli bir sorundur ve muamma olarak bırakılması sektördeki eğilimleri anlama konusunda önemli bir boşluğa neden oluyor.

Verilebilecek ikinci yanıt ise araştırmaların yöntem ve yaklaşımına dikkat çekmek zorundadır. İstatistikler ancak belli yorum çerçeveleri içerisinde anlam kazanırlar. Diğer bir deyişle, araştırıcının kurduğu evren içerisinde adlandırılıp değerlendirilmeleri mümkün. Bu nedenle istatistikler kadar, neyi nasıl aradığımız da önemli bir nokta oluşturmaktadır.

---

[1] Ankara Üniversitesi İletişim Fakültesi'nde araştırma görevlisi.

[2] Saim Yavuz'a ait raporların ilki Antrakt dergisi, ikincisi ise Sinema Gazetesi'nde yayınlanmıştır.

II- Gösterim alanında 1995 ve 1997 yıllarına ait veriler ve bunların karşılaştırılması

1995 yılının sonuna ait veriler, gösterim alanına ilişkin karşımıza şöyle bir manzara çıkarıyor:

> -Türkiye'de toplam 364 adet sinema salonu var. Bunların 152 tanesi (yaklaşık %40'ı) seks filmi gösteren sinemalardır.
> -Toplamda ise 147.000 adet koltuk vardır. Bunların 76.000 adedi (yaklaşık %52'si yine seks filmi gösteren sinemalara ait.
> -20'den fazla ilde hiç sinema salonu bulunmamaktadır. 19 ilde ise sadece seks filmi gösteren sinemalar vardır.
> -Salonların illere göre dağılımı son derece dengesizdir. Salonların %50'si, İstanbul, Ankara ve İzmir'de bulunmaktadır. Sadece İstanbul'da tüm salonların %35'i bulunmaktadır. Geriye kalan %50'lik pay, 54 il arasında dağılmaktadır.

Bu verileri daha anlamlı değerlendirmemizi sağlayacak bir kavram "ilk gösterim sinemaları" kavramıdır. İlk gösterimi en iyi biçimde "yeni/aktüel/popüler filmlerin ticareti zincirine dahil olmak" olarak tanımlayabiliriz. Diğer bir deyişle en yeni filmleri getirtip gösterebilme olanağına sahip olmak, "ilk gösterim sinemaları" zincirine dahil olmayı gerektirir.

İlk gösterime dahil olabilmek için işletmenizin büyük dağıtım firmalarının programını getirtebilecek maddi güce ve teknik donanıma sahip olması gerekir. Örneğin Warner Bros., UİP ya da Özen Film gibi şirketlerden yılın en yeni filmlerini alabilmeniz için yerine getirilmesi gereken bir takım şartlar vardır. Bunların bir bölümü o şirketlerin talep ettiği şeylerdir, bir bölümü de rekabet ortamının dayattığı şeylerdir.

Sinema işletmelerine baktığımızda son yıllarda ilk gösterime dahil olma konusundaki en önemli gösterge, "movieplex" ya da "cineplex" olarak adlandırılan çok-salonlu sinema işletmelerine dönüşmektir. İlk gösterime dahil olmayla sinema salonlarının bölünerek çoğalması arasında kolayca görülebilir ve işletmecilerin de teyit ettiği bir bağlantı var. Bu çerçevede salonların bölünüp bölünmediğine bakmak, bize o bölgede ilk gösterim sinemacılığının yaygınlığı hakkında bir fikir verecektir. Kuşkusuz seks filmi gösterimine ağırlık vermeyi de ilk gösterime dahil olamama olarak okumak mümkün. Bu durumda seks filmi gösterimi yoğunluğu, ilk gösterimin bir tür karşıtı olarak da yorumlanabilir.

Bu çerçevede, eldeki verilere daha yakından bakarsak şöyle bir tablo çıkıyor karşımıza:

> -Türkiye'de sadece yedi ilde movieplex/cineplex'ler bulunmaktadır: İstanbul, Ankara, izmir, Kocaeli, Bursa, Balıkesir ve Eskişehir.
> -Movieplex/cineplex'lerin bulunduğu bu yedi ilde, Türkiye'deki salonların %60'ı bulunmaktadır. Koltuk sayısı açısından bu oran ise %53'e düşmektedir.
> -Bu yedi ildeki toplam 214 salondan 107'si, yani %50'si movieplex/cineplex'lere aittir. Oysa aynı movieplexler bu ildeki koltukların sadece %32'sine sahip.
> -Geriye kalan ve movieplex olmayan 50 ilde salonların %40'ı, koltuklarınsa %47'si bulunmaktadır.
> -Bu illerdeki salonların %62'si seks filmi gösterirken, bunların koltuk sayısı da toplam koltukların %65'ini oluşturmaktadır.

Tüm bu veriler kafa karıştırıcı görünse de, sonuçta şu yorumları yapmak mümkün görünüyor:

-Moviepleksler ile salon sayılarının çoğalması arasında bir bağlantı var.
-Movieplekslerin çoğaldığı yerlerde ağırlıklı olarak küçük (max. 300'e kadar koltuğu olan) salonlar mevcut.
-Movieplekslerle "ilk gösterim" arasındaki bağlantı da göz önünde tutulduğunda, ilk gösterime dahil olma süreci, salon işletmecilerini salon sayısını çoğaltmaya zorluyor ve bu esnada salonların bölünerek küçültülmesi, yani koltuk sayısı az olan salonların ağırlık koyması durumu ortaya çıkıyor.
-"İlk gösterim"e çeşitli nedenlerden (mali yetersizlik, talep yetersizliği vb, güçlü rekabet vs.) dolayı dahil olamayan sinema işletmelerinde ise orta boy (300-600 arası koltuk) ya da büyük salonlar (600 ve daha fazla koltuk) ağırlıkta, çünkü bunlarda ilk gösterime dahil olmanın beraberinde getireceği bir takım yapısal dönüşümler (mevcut salonları bölmek, perde sayısını arttırmak gibi) gerçekleşmiyor. Diğer bir deyişle, eski yapının korunduğu bu illerdeki sinemalar hala Yeşilçam döneminin yığınsal film tüketimine yanıt vermek üzere tasarlanmış olan salon yapısını arz ediyorlar. İlk gösterime uzak kalan bu yerlerde eski yapıda bir dönüşüme gitmek mantıklı olmadığından, söz konusu eski salon yapısı değişmeden kalıyor ve bu büyük orta boy salonlar, eğer hala sinema işinde kullanılıyorlarsa, genelde, ucuza getirtilebilen seks filmleri gösterilen yerler oluyor.

Durumu somutlaştırmak için aşağıdaki verilere göz atmakta yarar var:

Sinema Türü	Toplam Salon	Küçük Salon	Orta B. Salon	Büyük salon
Moviepleksler	107	72 (%67)	24 (%23)	11 (%10)
Seks Sinemaları	152	21 (%14)	67 (%44)	64 (%42)

Görüldüğü gibi Movieplekslerde küçük salonlar ağırlığı oluştururken, seks filmi gösterilen sinemaların büyük bölümünde orta ve büyük boy salonlar ağırlıkta. Başka bir hesap yaptığımızda ise şu rakamları bulabiliyoruz: Toplam 112 büyük salonun %57'si seks sinemalarına aitken, Movieplekslerde büyük salonların oranı sadece %8. Tersine 122 adet küçük salonun ise %60'ı Movieplekslerde.

Bu veriler, ilk gösterime dahil olmayla salonların bölünerek çoğalması ve bu arada küçülmesi (koltuk sayılarının düşük olması) arasındaki bağlantıyı yeterince güçlü biçimde ortaya koyuyor.

1997 yılındaki veriler baktığımızdaysa kabaca şöyle bir gelişme görüyoruz:

-salon sayısı 364'ten 402'ye çıkmış, buna karşılık koltuk sayısı da 147.000'den 138'e düşmüş.
-salon artışı zaten salonların en yoğun oldu yedi ilde gerçekleşmiş. Örneğin İstanbul'da salon sayısı 125'ten 146'ya, Ankara'da ise 34'den 48'e yükselmiş. Ancak buna rağmen bu illerde koltuk sayısı yaklaşık olarak aynı kalmış, salonların çoğalma biçimi varolan salonların bölünmesi biçiminde gerçekleşmiş ağırlıklı olarak.

Buna karşılık diğer illerde salon sayısı neredeyse %30 oranında gerilemiş.

Görülüyor ki, ilk gösterimin yoğun olduğu bölgelerde salonların bölünerek çoğalması tüm hızıyla devam ederken, ilk gösterime dahil olamayan yerlerde salonların sayısı azalmaya devam ediyor.

Sonuç

Başlangıçta sorduğumuz soruya geri dönebiliriz artık: salon sayısı artarken, nasıl oluyor da koltuk sayısı azalıyor?

Kolayca görüleceği gibi, salon sayısındaki artış ilk gösterime bağlantılı olarak bölünmeden ve çok sayıda yeni küçük salonun açılmasından ileri gelirken; koltuk sayısındaki azalma, ilk gösterim ortamının rekabetine girecek güçte olmayan ve hala orta ya da büyük boy salonlara sahip olan işletmelerin kapanmasından kaynaklanıyor. Türkiye geneli gibi bir kategori ile yaklaştığımızda, *Merkez illerdeki salon artışı, diğer illerdeki bu kapanmaları, yani koltuk sayısındaki azalmanın da arkasında yatan nedeni görünmez kılıyor* ve yukarıda sorulan soruya yanıt vermek de güçleşiyor ister istemez

Genel olarak varabileceğimiz sonuç şudur: Türkiye'deki sinema pazarının ağırlık merkezi doğudan batıya doğru kaymaya devam ediyor. Türkiye'nin geneline ilişkin bir başarı gibi algılanan şeyin arkasında artan bölgesel eşitsizlikler varlığı göze çarpmaktadır.

Salon sayısı artarken koltuk sayısının azalması, böylece, küçülen bir pazara işaret ediyor; ama bu, küçülen pazarda ilk gösterime bağlı sinema ticaretinin giderek egemenlik kurması anlamına da geliyor. Kısacası ilk gösterimi örgütleyen kuruluşlar ve belli türdeki filmleri pazarlamayı yeğleyen bir yapılanma hakimiyetini pekiştiriyor. Yerli sinema üzerine yapılan analizler ve yeni politika geliştirme çabaları bu yapılanmayı göz önünde tutarak gerçekleştirilmelidir. Örneğin Eurimages gibi kuruluşların yapım alanına verdiği destek; desteklenen filmler ancak bu yapıyı hakim kılan dağıtım firmaları aracılığıyla pazara ulaştığından, aslında Türkiye çapındaki bölgesel eşitsizlikleri de desteklemiş oluyor sözgelimi.

İlk gösterim mekanizmasının, iktisadi eşitsizlikler üzerine kurulu olan ve aynı zamanda kültürel çeşitliliği, ifade özgürlüğü ve seçme özgürlüğünü sınırlandıran bir iktidar uygulaması olduğunu göz önünde tutarsak; sadece destekleme politikalarının ne olması gerektiği sorusu değil, bunların gerçekte neye destek olduklarının da çok iyi anlaşılması gerektiği konusu karşımıza çıkıyor. Bunda, istatistiklerin derlenmesi kadar, değerlendirilmesi de önemli bir noktadır. Bu nedenle önümüze çıkan görev, sadece istatistiklerin derlenmesi konusunda gelişme sağlamak değildir; bunların değerlendirilmesi konusunda vizyonların geliştirilmesi de aynı ağırlığa sahip kanımca.

TÜRKIYE’DE SINEMA BILET SATISINI IZLEME
SISTEMININ OLUSTURULMASININ GEREKLILIGI

Baha Özyükseler

Anadolu Üniversitesi, Eskisehir

4 Nisan 2001

<u>AÇIS VE TAKDIM</u>

Sayin Bakan, degerli katilimcilar;hepinizi saygiyla selamliyorum.

Ben Baha Özyükseler,baslica film stüdyolarini dünya çapinda temsil eden MPA (Motion Picture Association) isimli uluslararasi bir meslek birliginin ülkemizdeki uzantisi diyebilecegimiz AMPEC isimli sirketin 12 yildir yöneticisiyim. Bu yillari Sinema sektörünün hiç görünmeyen arka planinda, filmi yapan ve/veya dagitan stüdyo ve sirketlerin yasal haklarinin korunmasi çerçevesinde,sektör uzuvlarinin kontrolünde ve korsanlikla mücadele alanlarinda geçirdim. Sahsima bakanlikça tahsis edilen takdim konusu da iste bu denetim ve mücadele alanlarindan biri olan “Sinema Bilet Satisinin Izlenmesi sistemi”dir.

<u>BAKANLIGA TESEKKÜR</u>

Dogrudan konuma girmeden önce,bu vesileyle bir hakki teslim etmek istiyorum. Bugünden tam bir ay önce entellektüel alanda bir kilometre tasindan geçildi. 5846 sayili “Fikir ve Sanat Eserleri Kanunu” önemli ölçüde gelistirildi. Bu atilimin tüm mimar ve teknisyenlerini basta sayin Kültür Bakanimiz olmak üzere içtenlikle kutluyoruz.

<u>ANA KONU (Sistemin tanimi ve amaci):</u>

“Sinema bilet Satislarini izleme Sistemi” daha kisaca “Sinema Kontrol Sistemi” nedir, amaçlari nelerdir?

Bu sistem; dar anlamda bir film için satilan bilet sayisinin,dolayisiyla da o filmi izleyen seyirci sayisinin dogru belirlenmesine yardimci olan ya da denetleyen; genel anlamda da bu dogrulugu ülke çapinda saglamayi amaçlayan özel bir kontrol sistemidir. Bu tanim dogaldir ki sistemi anlamak için yeterli degil. Bu nedenle öncelikle seyirci sayisinin ve sinema gelirlerinin temel ölçütü olan sinema biletinin islevleri ve satilan bir sinema biletine ne oldugunu anlatmak istiyorum.

Bir film yada genel anlamda tüm filmler için seyirci sayisinin belirlenmesi; gerek istatistiksel gerekse gelir/hasilat hesaplari için, esas olarak bileti satan ve izleyicileri salona alan Sinema isletmecisinin kontrolündedir. Teorik ve hatta çogu kez pratikte, isletmeci ne derse, ne sayi rapor ederse izleyici/ Satilan bilet sayisi odur. Sinema istatistiklerine giren temelde bu sayidir. Dergi ve diger medyada görülen/duyulan falanca filme ait seyirci sayisi, veyafilanca yilda ülke kapsaminda toplam seyirci/bilet sayisi hesabinin temelinde bu vardir. Herbir film/herbir sinema/herbir gün-seans için sinemaci tarafindan rapor edilen bu sayilar degisik amaçli bir yigin istatistiksel hesaplamalara girer. Dahasi; gelirlerin paylasimina esas olur.Kisaca,tüm bunlarin temel girdisi satilan herbir sinema biletidir.

Simdi can alici nokta su; Eger bu temel sayi/ sayilar dogru ise , istatistikler ve diger tüm bagli hesaplar gerçegi yansitir, aksi halde yansitmaz ve bir dizi sorunlara yol açar.

SINEMA BILETI

Simdi satilan her bir bilete ne oldugunu açiklayayim.

Bir sinema bileti içinde % 8 KDV ve % 10 oraninda belediye eglence vergisi vardir. (Eglence vergisinin son durumunu belirle.SMSDF na ödeme var mi?.Fon ne oldu?).Bu vergiler kesildikten sonraki büyük bölüm (% 84 kadar) Biletin net hasilatini olusturur. Halen sinema sektöründe bazi istisnai durumlar disinda uygulanan sisteme göre ; net hasilat, filmi gösteren sinema isletmesi ile filmin ithalatçisi ve/veya dagitimcisi arasinda karsilikli anlasmalarla belirlenen bir oranla paylastirilmaktadir.Bu sistemi daha net açiklamak için 2 milyon TL lik bir biletin bölüsümünü görelim:

Bilet: 2 milyon TL:

KDV :148,148.TL (%)

Eglence vergisi :168,350.TL (%)

Bilet net gelir :1,683,502 TL

Beher bilet için böylece hesaplanan ve satilan milyonlarca bilet sayisiyla çarpildiginda toplamlari büyük meblaglara varan tüm bu yasamsal bölüsüm temelde ve biryerde zorunlu olarak sinema isletmecisine tevdi edilmistir.Isletmeci bileti satacak, KDV ve eglence vergisini kesecek ilgili tahakkuklarla ve ilgili mevzuata göre ödeyecek ve dahasi dagitimci yani daha anlasilir bir deyisle filmin sahibine sattigi bilet sayisini deklare ederek hissesini ödeyecektir.

EKSIK BILDIRIM (NEDENI VE SONUÇLARI)

Simdi, konunun bir baska boyutunu kisaca animsayalim.Bazi ülkelerde ve bu arada kendi ülkemizde de ciddi ölçüde bir “Kayit disi ekonomi “ olgusu süregelmektedir.Sanirim bu konuyu herkes yeterince bilmektedir ve ayrintilara girmenin bir yarari yoktur. Iste biraz önce anlatmaya çalistigim ödeme ve paylasma asamasinda bazen kayitdisi ekonomi kurallari uygulanir ve satilan bilet sayilari çesitli yöntemler kullanilarak,ki bu husus takdim konularimiz arasinda degildir, eksik deklare edilir. Öyle ki;bu eksik deklarasyonun ölçüsünün, geçmiste ender de olsa tüm bir seans seyircisinin yok edilmesine kadar vardigi, bazi özel durum ve vakalarda bir sinema için toplam %50 oranina ulastigi belirlenmistir.

Sonuçta ne olur?.Bildirilmeyen beher veya toplam bilet/Seyirci için

Devlet/Maliye bakanligi :KDV

Ilgili Belediye /Fon :Eglence vergisi /SMSDF

Filmin sahibi/Dagitimci :Hissesi

Dogrudan sinema isletmecisinin veya bazi hallerde isletmecinin haberi olmaksizin bazi sinema çalisanlarinin dogrudan cebine gider.Ayrica isletmeci ve dagitimci paylari tahakkuk ve gelir hesaplarina girmeyeceginden bu unsurlarin vergiye esas olacak gelirlerini ve vergi matrahlarini negatif olarak etkiler ve daha somut ifadeyle gelir vergisine dahil olmaz.

Bu durum herhalde gelir ve vergi kayiplari yaninda ;daha önceki konferansçilarin konusu olan SINEMA ISTATISTIKLERI nede belki de ayni önem derecesinde negatif olarak etki yapar.Bilet/Seyirci sayisi dogruysa Istatistikler dogrudur,yanlissa ayni oranda yanlistir. Simdi herhangibir yilda toplam eksik bildirim oraninin %30 civarinda oldugunu düsünün.Istatistikler hangi dogruyu gösterecektir.?

Takdir edersiniz ki sektörde çesitli planlama ve yatirim kararlarinda ISTATISTIKSEL sayilarin önemi yadsinamaz. Yanlis sayilar ise yanlis yatirimlara neden olabilir ,hatta bazi yatirimlarin önünü kesebilir. Özellikle gerçegin çok altindaki sayilar, sektörün olmasi gereken yerin çok altinda bulunmasina yol açabilir.

ÇARE (Bilet satislarini izleme sistemi/Sinema kontrol sistemi)

Su ana kadar anlatilan sorun karsisinda bu soruna çözüm getiren bir sistemin gerekliligi,ki konferansimin basligi budur, herhalde kendiliginden yanitlanmis olmaktadir.

Genel anlamda kayit disi ekonominin engellenmesi için ;Devlet,Maliye teskilati ve belediyeler tarafindan alinan ve alinacak her türlü önlem,kural ve yöntemler dogaldir ki bu spesifik sorunun giderilmesine katki yapar,hatta belki gelecekte bir gün bütünüyle sorunu yok eder.

Makro düzeyde ülke çapinda bulunabilecek asil çareyi ülke yöneticilerine birakip,temsilcisi oldugum grup adina özel olarak 1990 yilinda olusturarak yürütegeldigimiz bir sistemi ana hatlariyla bilgilerinize sunacagim.

Ampec tarafindan örgütlenmis "Sinema Kontrol Sistemi"nde:

1. Merkez yönetimi
2. Sinema kontrol elemanlari (20 ilde 200 civarinda ,genelde üniversiteli
3. Sisteme üye ithalatçi/dagitimci film sirketleri
4. Sinema salonlari/Isletmeciler (Üye sirket filmlerini oynatan, yaklasik 150 sinema dahilinde 350-400 salon)
   vardir.

Sistem esas itibariyle ;seçme ve örnekleme yoluyla belirlenmis film gösterimlerine giren seyircilerin (sektör terimiyle seanslarin) seyirci rolündeki egitilmis kontrol elemanlarinca belirli tekniklerle sayilmasi,sayimlarin rapor edilmesi , bu sayimlarla sinema isletmecileri tarafindan deklare edilen miktarlarin karsilastirilmasi esasina dayanan fiziki kontrol islemlerinden olusur.Sistemin fiziki sayim sonuçlari ile isletmecinin deklare ettigi sonuçlar arasinda normal disi siklikta ve +- %5 disinda sapma(eksik deklarasyon) belirlendigi takdirde o sinema isletmesi "Süpheli" kategorisinde yakin mercek altina alinir ve, kesin sonuca kadar özel kontrole tabi tutulur.

Sistem,20 civarinda önemli ilde ,üye sirketlerinin filmlerinin gösterime sunuldugu 350-400 civarinda sinema salonunu kapsayan bir düzeyde 1990 yilindan beri yürütülmektedir. Sistemin fiziki sonuçlari yaninda önemli ölçüde psikolojik etkisinin de oldugu,bu sayede birçok isletmecinin (ve/veya personelin) "kontrol altindayim" duygusu altina sokuldugu ve genel bir ifadeyle SEKTÖRÜ DISIPLINE ETME hedefine vardigi belirlenmistir. Bu uygulama gerçekte,ilgili sinema personelini de denetim altina alarak ayni zamanda SINEMA ISLETMECILERI nin tarafindadir. Sistemin bu süredeki etki derecesinin oransal ifadesini söyle açiklayabiliriz.

"1990 yilinda ülke çapinda genel ve ortalama olarak kabaca tahmin edilen eksik bildirim orani%30 iken; günümüzde %5 civarinda olarak degerlendirilmektedir. Aradaki fark yillik 5 milyon bilete karsilik gelmekte, bunun parasal ifadesi ise 15 milyon dolar civarinda olmaktadir.

Uygulanan sistem dogaldir ki,mükemmel degildir.Sonuçta bazi kisilerin fiziki sayimina dayanmakta; bu nedenle hata payi, ve hatta,kasitli ya da degil yaniltma olasiligi bulunmaktadir. Bazi salonlarin plani saglikli sayima olanak vermemektedir.Ancak yerine daha güvenli teknolojik bir sistem konmadigi müddetçe de kullanilmaya ve film hak sahiplerinin isine yaramaya devam edecektir.

Sadece ülkemizde degil,yabanci ülkelerde de elektronik/digital bir sayim/kontrol sisteminin kullanildigi hususunda kesin konfirme edilmis bir bilgimiz yoktur. Ideal olan;sinema sektöründe herhangi bir salona giren her seyircinin veya satilan her biletin otomatik olarak sayimini yapan ve aninda belgelere geçiren ve disaridan müdahale edilemeyen bir bilgi islem/iletim sisteminin olusturulmasidir.

Teknoloji bir gün, hem de çok uzak olmayan bir gün, bunu da halledecektir.

THE NEED TO ESTABLISH A SYSTEM IN TURKEY FOR MONITORING
THE SALE OF CINEMA TICKETS

Baha Özyükseler
University of Anatolia, Eskisehir

4 April 2001

INTRODUCTION AND PRESENTATION

Mr. Minister, Ladies and Gentlemen,

I am Baha Özyükseler, and I have been the director of a company by the name of AMPEC for the last 12 years. It is a company which one could say is the Turkish extension of the Motion Picture Association (MPA), an international professional association which represents primarily film studios at the world level. I have spent those 12 years in the fields of the monitoring of the members of the cinema sector and efforts to combat piracy within the framework of the protection of the statutory rights of studios and companies in the sector which make and/or distribute films, but which remain in the background and are little known. And the subject of the presentation which the Ministry has assigned to me, "The system for monitoring the sale of cinema tickets", is one of the fields involved in those control and anti-piracy efforts.

OUR THANKS TO THE MINISTRY

Before broaching the subject proper, I would like to take this opportunity to express our due appreciation. Exactly one month ago a milestone was reached in the intellectual field, when very significant progress was made in the development of the "Intellectual Works and Works of Art Act" (no. 5846). We sincerely congratulate all of the architects and technicians involved in this step forward, and in particular our Minister of Culture.

MAIN TOPIC (definition and purpose of the system)

What is this "System for Monitoring the Sale of Cinema Tickets" or, in short, "Cinema Control System" - what are its objectives?

In the narrower sense, it is a system which makes it easier to determine accurately the number of tickets that are sold for a film, and thus the number of persons who go to see it, and/or which supervises the sale of those tickets; and in the broader sense, it is a special control system which aims to ensure the accuracy of that sales count throughout Turkey. Although that definition correct, it is not enough for understanding the system. So I want first of all to explain the functions of cinema tickets, which are the fundamental yardstick for the number of cinema-goers and box-office receipts, and exactly what happens with the cinema tickets that are sold.

The determination of the number of persons who go to see a film or films in general is basically in the hands of the cinema manager who sells the tickets and allows cinema-goers access to the cinema - whether for statistical accounts or for calculating receipts/results. In theory, and indeed very often in practice, the number of tickets sold is whatever number the cinema manager quotes, the number he reports. And that number constitutes the basis which is entered in the cinema statistics. Those figures that are reported by the cinema manager for each individual film / each individual cinema / each individual daily showing are entered in a mass of statistical accounts that are used for various purposes. And what is more, they constitute the basis on which receipts are shared. In short, each individual cinema ticket sold forms the basic input for all of those figures.

And the crucial point here is this: if those basic figures are correct, the statistics and all of the related accounts will reflect reality; if they aren't, they won't, and they will cause a number of problems.

CINEMA TICKETS

I shall now explain what happens with each individual ticket that is sold.

The price of a ticket includes 8% VAT and 10% municipal entertainment tax. (Find out the latest situation regarding entertainment tax. Is any payment made to the SMSD Fund? What has become of the Fund?) After deduction of these taxes, the major part of the remainder (about 84%) constitutes the net return on the ticket.According to the system currently employed in the cinema sector, except in certain exceptional circumstances, the net return is shared between the management of the cinema showing the film and the film importer and/or distributor in a proportion laid down in mutual agreements. In order to explain this system more clearly, let us take a look at how a 2 million TL ticket is divided up:

Ticket: 2 million TL:

VAT:	148 148 TL (%)
Entertainment tax:	168 350 TL (%)
Net return on ticket:	1 683 502 TL

When this calculation for each ticket is multiplied by the millions of tickets sold, the totals amount to considerable sums, the distribution of which has essentially and, in a way, necessarily been placed in the hands of the cinema manager. The manager will sell the ticket; he will deduct the VAT and the entertainment tax, he will pay with the relevant accruals and according to the legislation and, in addition, he will declare to the distributor or, to put it more explicitly, to the owner of the film how many tickets he has sold and pay him his share.

UNDERREPORTING (REASONS AND CONSEQUENCES)

Let us now turn briefly to another dimension of the issue. In certain countries, and meanwhile also in Turkey, the "unregistered economy" is becoming a frequent occurrence which is taking on serious proportions. I presume that everyone is sufficiently familiar with this subject and that there is no point in my going into details. The fact is that in the payment and sharing phase which I have just endeavoured to explain the rules of the unregistered economy sometimes apply and the number of tickets sold is underreported. (Various methods are employed here, but this is irrelevant to the field of subjects which I am presenting.) With the result that, although it was more rare in the past, it has been established that the extent of this underreporting can amount to cancelling up to an entire showing and that in certain special cases and circumstances the rate can reach a total of 50% for a cinema.

So what is the consequence? For each or the total number of tickets/cinema-goers which are not reported:

The State / Ministry of Finance	: VAT
Relevant municipality / Fund	: entertainment tax / SMSD Fund
Proprietor/distributor of the film	: his/her share

It goes straight into the cinema manager's pocket or, in some cases, into the pocket of certain cinema employees without the manager's knowing. Furthermore, since it will not be entered in the accrual and income accounts for calculating the managers' and the distributors' shares, this has a negative effect on the incomes which are to be taken as a basis for taxation and tax assessment; to put it in concrete terms, it is not included in income tax.

In addition to the income and tax losses, this situation probably also has an equally negative effect on CINEMA STATISTICS, which have already been dealth with by other conference participants. If the number of tickets/cinema-goers is accurate, then the statistics will be accurate; if it is inaccurate, then the statistics will be equally inaccurate. So just imagine that the total rate of underreporting for any given year is in the region of 30%. What reality will the statistics reflect?

You will appreciate that STATISTICAL information is of undeniable importance for various planning and investment decisions in the sector. But inaccurate figures can lead to faulty investments and can even obstruct certain investments. And in particular, figures which are far below the real figures can lead to a situation where the sector holds a position that is much lower than its due.

CARE (System for the monitoring of ticket sales / Cinema control system)

In view of the problem described so far, the need for a system which will bring a solution - as is the title of my address - no doubt speaks for itself.

Any type of measures, rules or methods which the State, the financial authorities and the municipalities are currently implementing or will implement in the future to restrict the unregistered economy in the general sense are natural, and indeed they will contribute to the elimination of this specific problem and perhaps eradicate it completely one day.

I shall now outline a system which I set up in 1990 on behalf of the group I represent, leaving the fundamental remedy to be found country-wide at the macro level to those who are governing our country, and which I have been running continuously since that date.

The "Cinema Control System" organised by the AMPEC comprises the following elements:

1. central management
2. cinema supervisory staff (approximately 200 in 20 provinces, generally undergraduates)
3. film-importing/distributing companies which are members of the system
4. cinema screens/managers (350-400 screens in approximately 150 cinemas showing member companies' films).

The system consists essentially of counting the members of the audience who go to see the film showings, which are determined by selection and sampling (these counts are carried out by trained supervisory staff, who use specific techniques and assume the role of members of the audience), reporting on the counts, and physical control procedures based on the principle of comparing those counts with the figures quoted by the cinema managers. Where an abnormally frequent discrepancy of over +/- 5 % between the system's physical count results and the results reported by a manager is detected (underreporting), that cinema manager is scrutinised in the "suspicious" category and is subjected to special supervision until a definite conclusion is drawn.

The system has been running in some 20 major provinces since 1990 and has covered between 350 and 400 screens where member companies' films have been shown. It has been established that, in addition to its concrete results, the system has had a considerable psychological effect and many managers (and/or cinema employees) have thus got the feeling that they were being monitored, and that it can be said in general that the objective of DISCIPLINING THE SECTOR has been achieved. In fact this practice is also of benefit to CINEMA MANAGERS, since it also supervises cinema employees. The extent of the effect of the system in the above period can be illustrated with the following figures:

whereas the general average rate of underreporting was estimated at roughly 30 % in 1990, it is now estimated at approximately 5%. The difference between the two rates amounts to 5 million tickets per year; expressed in monetary terms, this is equivalent to approximately 15 million dollars.

It is quite a normal system, if imperfect. In the final analysis, it is based on physical counts carried out by certain persons; there is therefore a possibility of a margin of error and even misleading results - whether deliberate or not. The design of some cinemas does not permit a proper count. But until such time as a more reliable technological system has been installed, it will continue to be used and to serve the purpose of film copyright owners.

We do not have any information that has definitely been confirmed as to whether an electronic/digital counting/control system is used - not only in Turkey but also in foreign countries. The ideal solution would be to develop a system for processing and communicating information which automatically counts every single person who enters any given cinema theatre or every single ticket sold and immediately enters that information in the relevant report and which cannot be interfered with by external forces.

Technology will provide such a system one day - not even in the very distant future.

Operational Models for Public Support for the Film Industry in Europe

By Lone Le Floch Andersen, expert, European Audiovisual Observatory
Lone.Andersen@obs.coe.int

April 2001

Introduction

Public support for the film industry is a common feature of national film industries in Europe, as well as in major developed economies such as Canada and Australia. From having been essential a concern at the national/state level, operating within a national context/market and based on provision of financial assistance, public investment into the creation of a sustainable indogene and/or European production of audiovisual works, now draws on a highly diversified palette of policy instruments and implementation mechanisms. From having been mainly concerned with the question of "how much" public money was available, comparative analysis of public funding systems for the audiovisual industry has shifted its focus to the question of "how/ by which means" and "how efficectively" public support policies and instruments correct market deficiencies and ensure cultural diversity.

The famous quote from André Malraux's *Esquisse d'une psychologie du cinéma (1959),* according to which filmmaking is an art form AND an industry, announced the increasingly strong imbrication between the economic and the cultural dimension of the production of audiovisual works in Europe.

In the Mid-eighties models for public support to the film industry in Europe, were fairly simple to describe up as they, in most cases corresponded to the institutional and organisational description of 1 or 2 state-controlled entities. Since then the nature of the national and European film/audio-visual industries as well as the speeding up of economic changes in general, call for a widening of the angle under which public intervention is considered. To use an image, one could say that from being uni-dimensional, public support policies and instruments have become tri-dimensional. And this in more than one sense!

Looking accross Europe, this tri-dimensionality is present through

1. The **co-existence** within the same framework and/or national context of both **cultural and economic policy objectives and concerns;**

2. The increasing focus on the **"cultural entrepreneur",** and in this context more specifically**, the production company** vs. individual projects/filmmakers;

3. The **inter-play between sector specific and transversal economic incentive programmes (ie**. Cooperation between economic developement agencies and local/regional production support funds, role of structural funds for developement of regional support policies for the audiovisual sector);

4. **Active dialogue and collaboration** between the public authorities, the content producers and investors. Transparency and accountability are key is this relationship.

5. The **inter-play between measures conducted at various policy levels** (European, national and local/regional)

No Universal Model(s), but Examples of Operational Frameworks Based on Common Ingredients

There is no universal model(s) for public support into the film sector. Nor can one really speak about the existence of a distinct “British”, or “French” or “German” model. As we will see it through this presentation, there more or less complex operational frameworks resulting from individual factors and constraints. Parting from one or several specific policy objectives, each of these frameworks draw on common ingredients like the financial basis upon which the “system” or the type of policy instruments and mechanisms operate. In addition, a growing number of public policies outline concrete and mesurable success indicators for the announced objectives, to be achieved within a given timeframe (generally 3 or 5 years). One well-known example are the EU MEDIA programmes I, II and + for which a precise list of “targets” and envisaged effects and impacts were/are drawn up and subsequently monitored and evaluated. [1]

Nature of Policy Objectives

The nature of the objectives pursued is the central point around which funding policies and instruments are constructed. Since selective funds are generally created to correct the functioning of the market and to act as a nursery for new work (through funds for short films and first and second films) and for artistic experiment, the cultural aspect is predominant. Nevertheless, the need to take account of the financial viability of a project, the track record of the director and producer, as well as the requirement for the assessment of having minimum guarantees and/or television pre-sales in place, will guarantee the necessary attention to market realities.

These dual objectives and the economic and cultural preoccupations, like the objectives of the MEDIA programmes, are a sign of a certain maturity in the system. MEDIA's overall objective is to promote and strengthen the European film and television industry by improving its competitive capabilities, particularly at the level of small to medium enterprises, and taking account of the cultural dimension of the sector. In most of the Western European countries these two kinds of objectives are met by the co-existence of economic funding mechanisms and mechanisms aimed at culture, such as funding for new directors and short films.

“ Cultural ” Objectives (Sustaining National Film Production and Culture)

General objectives of culture upon which public support for film funding is based include for example: [2]

* the democratisation of culture
* the preservation of the heritage
* support for creative work in more or less radically new directions
* freedom of expression and creation

Other objectives, which may vary from one country to another, may also be set out :

* assertion of cultural identity
* promotion of popular culture
* receptiveness to multiculturalism
* encouragement to cultural democratisation fostering independent expression on the part of every individual/community

[1] BIPE. MEDIA II Mid-Term Evaluation. Final Report, November 1998 available at http://europa.eu.int/comm/avpolicy/media/eval_en.html

[2] Wangermée, R. Evaluation of national cultural policies – Guidelines for the preparation of national reports, Council for Cultural Co-operation, Council of Europe, DECS-Cult/CP (93)3, Strasbourg, 1992.

This type of objective has traditionnaly been the central aims of national selective production funding policies. These are all very recommendable objectives. The question remains, however, how to go about actually translating these into measurable targets.

Another important point adding to the complexity of clearly defininf the initial cultural-type objectives here is the political nature and changing manner in which these objectives are interpreted.

Economic Objectives (Structurally Developping the Market(s) for Domestic Films, Industrial-type Policies)

Economic objectives are often concern the notion of growth (ie. Job/employment generation) and or with the development of individual economic actors and/or infrastructures.

Here you can adopt the analysis of direct, indirect and induced effects, based on a model of income determination. A distinction is made between the direct cost of incentives, the benefit from realising the budget and the benefit arising from the consumption of the subsidised production.

The incentive's direct cost includes the amount given to media productions (less return), the handling costs and the excess burden caused by financing the sum.

The main benefit from realising the budget is the creation of regional income which is being further increased by multiplier effects. Consequently the region will benefit from higher tax revenues and lower transfers to be paid. Additional employment will improve the labour situation. A long-term extension of the regional production volume will raise the production capacity.

The benefit from media consumption includes cultural/artistic effects, and tourist destinations profit from free publicity if the production is internatioally shown. Arising benefits from trade and exploitation of the subsidied productions regularly suffer crowding out effects.

From an economic point of view, the most frequently used strategies for developed for subsidising the media sector, the benefit of each strategy being contrasted with its cost, can be defined as follows.

> A **growth strategy** aims at locating/extending a regional media cluster. The popularity of this industry is due to high value added, higher employment rates and a promising future.
>
> A **tourism strategy** makes use of the media productions's enourmous advertising potential which can be achieved through (multiple) international exploitation.
>
> In case of a **cultural strategy** the incentives are used for conserving a small media cluster. A constant level of capacity utilisation shall provide the necessary framework to allow regional, cultural media productions.

When analysying these, one needs to take into account the he concepts of efficiency, effectiveness, profitability and output

> **Efficiency** is expressed by means of the relationship between the resources employed and the results obtained . In particular it concerns the relevance (suitability) of resources to achieve results.
>
> **Effectiveness** is expressed by means of the relationship between the objectives set and the results obtained .
>
> **Profitability** is expressed by means of a financial ratio, for example own resources in relation to profit margin. It can be used in particular to calculate the return on investment. Some qualitative impact studies and evaluations refer to return on public investment, or return on social investment.
>
> **Output** is expressed by the quantity produced in terms of a unit of measurement .

Productivity is an economic concept expressed by the relationship between capital/labour and units produced.

The concept of " effects " may be preferable to that of results, which appears more restrictive, being limited, in terms of time and space, to the direct consequences of an action. The concept of impact may be used to measure the side effects of a policy.

Economic impact studies are concerned with which of the financial flows within and economy may be attributed to a cultural activity . This question may be addressed by identifying three types of expenditure :

* **direct expenditure** : payment for factors of production, purchase of goods and services, salaries and expenses

* **indirect expenditure** : accompanying consumption by the public or by cultural consumers

* **induced investment** : Keynesian mechanism whereby an external cause has a knock-on effect on the economy (employment-income ; income employment, etc.) and engenders a demand that is higher than the initial expenditure (multiplier effects). The relationship between the two is known as the multiplier, which itself depends on the leak rate relating to the prevailing economic climate, that is the expenditure in an area regarded as generating imports, savings or taxation.

The following short list of objectives of individual funding bodies clearly illustrate the “mix” of cultural and economic objectives in practice:

Country/organisation	***Objectives stated***	**Cultural Objectives**	**Economic Objectives**
Danish Film Insitute[3]	Fremme filmkunst, filmkultur og biografkultur (Encourage film as an artform and a cultural expression/practice)	Preservation of heritage National film culture	Yde ökonomisk stötte Fremme salget og kendskabet til danske film I udlandet Stötte til drift af det danske filmstudie Dialog with sector professionals and trade organisations
British Screen Finance (Ceased in 2000)	Provide support for British Filmmakers seeking to develop and produce films for the cinema.	Encourage film art in Great Britain and to allow the making of films showing life in Britain and the country’s cultural values.	Ensure survival of British film production and to build up a strong British Film Industry.
Filmstiftung Nordrhein Westfalen	Create employment by funding high-quality films	Fund high quality films	Creating economic activity and employment in local media industry
Filmförderungsanstalt (FFA)	• Raising standard of quality in German film and cinema • Improvement of Economic Structure and the film industry • Cultivate cooperation between the film industry and TV • Improved coordination of support measures of the federal government and states	• *Raising standard of quality in German film and cinema*	• *Improvement of Economic Structure and the film industry* • *Cultivate cooperation between the film industry and TV*
MEDIA II[4]	Strengthen the competitiveness of the European audiovisual industry through a series of incentives covering the training of professionals, the development of production companies and projects, and the dirstibution of cinematographic works and audiovisual programmes.	Les objectifs du programme doivent concourir: - au respect de la diversité linguistique et culturelle européenne, - à la mise en valeur du patrimoine audiovisuel européen, - au développement d'un secteur de production et de distribution indépendantes, notamment des petites et moyennes entreprises.	- au renforcement de la compétitivité de l'industrie audiovisuelle européenne sur le marché, notamment européen, en soutenant le développement de projets ayant un véritable potentiel de diffusion, - au développement du potentiel dans les pays ou les régions à faible capacité de production audiovisuelle et/ou à aire géographique et linguistique restreinte,
EURIMAGES	The purpose of the European support fund for the co-production and distribution of creative cinematographic and audiovisual works - hereinafter referred to as "the fund" – shall be to encourage in any way to be defined by the board of management the co-production, distribution, broadcasting and exploitation of creative cinematographic and audiovisual works, particularly by helping to finance the co-production, distribution, broadcasting and exploitation.		Economic, through the support of artistic creation, it invests in an industry operating according to market trends take concrete measures in the financial field to encourage the production and distribution of films and audiovisual works and, thereby, the development of the programme industries;

3 Danish Film Law ‘Lov om film” 12.03.1997, Det Danske Film Institute, Virksomhedsregnskab 1998

4 95/563/CE: Décision du Conseil, du 10 juillet 1995, portant sur la mise en oeuvre d'un programme d'encouragement au développement et à la distribution des oeuvres audiovisuelles européennes (Media II - Développement et distribution) (1996-2000) Journal officiel n° L 321 du 30/12/1995 p. 0025 - 0032

Main “ingredients” and features according to nature of policy objective pursued

	Cultural	Economic
Objective	Ex. “Contribute to the increasing of the artistic value of German Films” (BKM) “ Contribute and promote the circulation of German films with high artistic value” (BKM)	Maintain and creative employment through the support of highquality films (Filmstiftung Nordrhein Westfalia)
Financing	State budget evt. completed by revenues from special taxes	Direct contributions of broadcasters Reimbursement of loans Other own revenues Guarantee funds
Organisation	Programme(s) managed directly by the Ministry Central state institution Foundation	Independent public entity Public/private partnerships Out-sourcing to credit institutions or private entities operating under a public service remit
Focus on	Project/Film-by-film oriented	Concentrates around the AV company and its business environment or on
Main beneficiaries/target groups	Filmmakers and/or their producers	The production company/the cultural entrepreneur
Type of intervention	Selective Grants/Advance on receipts	Automatic, slate-funding Repayable loans “Forced savings”
Selection process/criteria	Committee Consultant (Scandinavian countries) Assessment of the artistic quality and value of the project	Objective, quantifiable criteria and requirements controlled by fund administrators and/or outside organisation Economic viability of the project or business plan Commercial potential
Operational data generated	Amounts of public money paid out If statistical data processesing capacity, generation of aggregated data regarding genre, average budgets etc.	Very detailled information on the accounts of the film/company provided to the funding organisation. Information, is however, not always public and/or publicly accessible.
Objective success measures	Maintenance and/or increase of number of feature films produced Success and market share of national films Can often only be assessed on a film by film basis	Growth of companies having received funding Rate of reimbursement of loans granted Number of non national European films in distribution

[Presentation]

1. Developments in National and European Funding

A. Volume and Importance of Support

1. In absolute terms public funds for support and investment into audiovisual/film production has grown (average 10% between 2000/2001) either through impetus of strategic policy measures or through increase in marked-levied resources.
2. Fewer and fewer European films are made without national/European support; increase in production costs makes producers even more dependant.
3. As funds are "shared" with other types of production, one can only speak of relative increase.

National Frameworks

	FRANCE 144 Films (2000)	GERMANY 66 Films (2000)	UK 73 Films (2000)	DENMARK 18 Films (2000)
Main Feature	Centralised	Major « Medien-standorten»	Economic& Business Re-focusing	« Boost» of Nat. Production (1999-2002)
Institutions	CNC Regional/Local : Rhône-Alpes, APCVL, CRRAV, THECIF, etc.	FFA & BKM & Kuratorium Regional/Local : Länderfonds	Film Council Regional/Local : Sgrin, Scottish Screen, LFVA	DFI & Novellefilm Regional/Local : Jydske Filmfonden
Total (2000)	378 M € (CNC) + 11.5 M € (Regions)	62 % Länderfonds 28 % FFA 8,75 % BKM	32,8 M € (FC)	25 M € + 270 000 €
Policy Instrument& Innovations	SOFICAS/IFCIC Strong Regulation	« Medienfonds »	Tax Reliefs Section 42 & 48	« Vaekstfonden» (Risk-capital)

B. Two Major Areas of Development in the 90's.

1. Regional Support

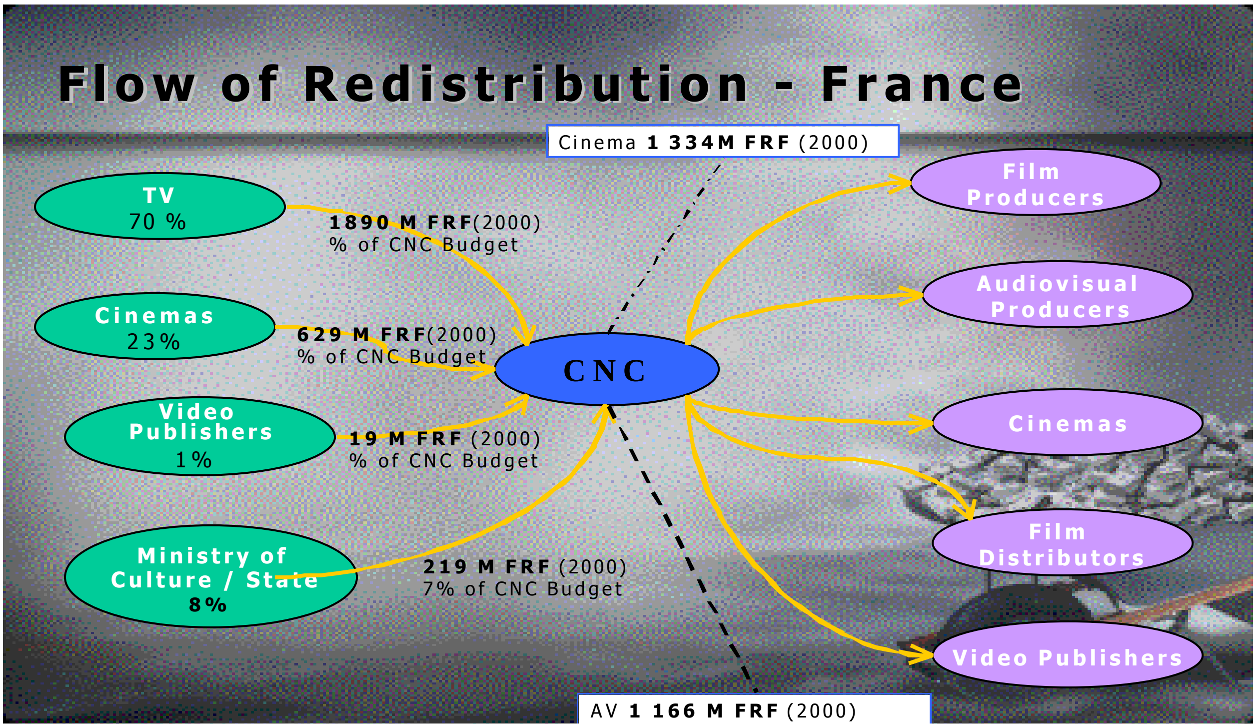
A. In number most important portion of new funds created.
B. Also correspond to largest injection of "fresh" public money.
C. Higher focus on economic returns and aspects.

2. Stimulating Private Investment

A. Tax reliefs
   1. UK + IE
   2. DE (Medienfonds)
   3. FR (Soficas)
   4. LU (Investment certificates)

B. Matching & guarantee funds
   1. Vaekstfonden (DK) + BEI "i2I AV"
   2. BNL + BEX (IT + ES) guarantee + IFCIC

C. As Illustrated by the French Example in some Countries one Should Rather Speak of "Public Redistribution" of Market Revenues than "State/Publicly Financed".



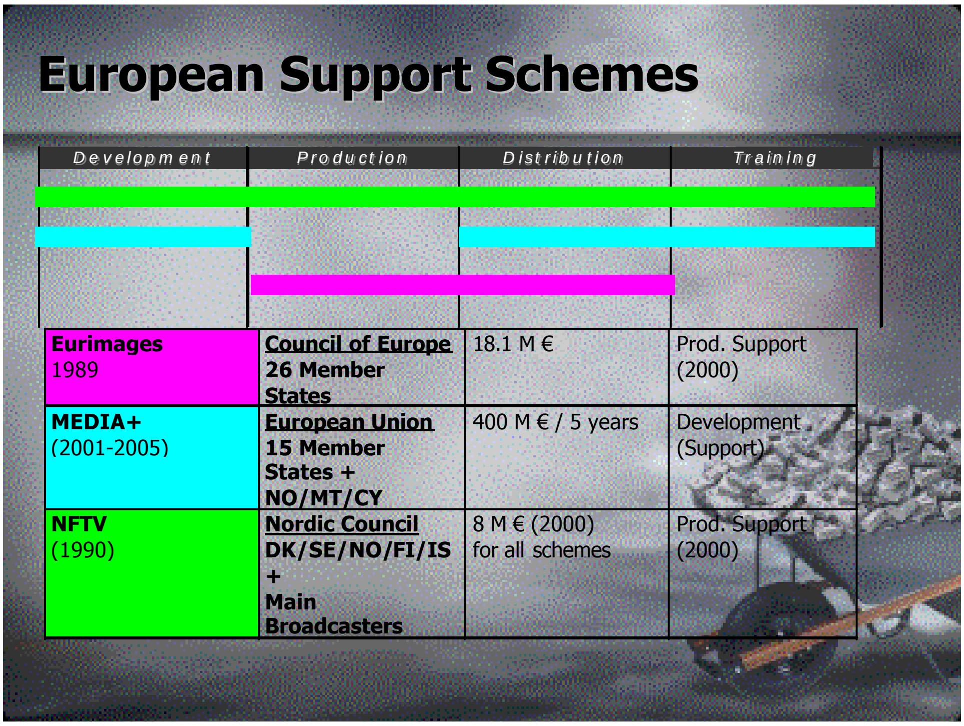
1. Only 7% of CNC-budget come from the French State.
2. TV is the major contributor:
   - 2/3 of budget
   - revenue segment which has increased the most

3. The tax on video sales = negative / decrease in revenues

⇨ E.g. the 9% increase in the CNC-budget between 2000 and 2001 mainly linked to the increase in market-levied revenues.

⇨ Relevant question: will what was originally devised (TSA, TV tax, video tax) as a means of making support mechanisms less dependent upon/sensible to reductions in state/public budgets and spending, make funding organisations more prone for pressure from major players/"contributors"? (guarantee of independence?)

⇨ Several countries (GB, CH, BE, etc.) use lottery funds to ensure industry support and/or financing on AV-institutions (Cinematec de Belgique), which is another means of financing the national support system without digging into state budget.



a. represents ca. 110 Mio. EUR / p.a. for Eurimages/NFTV/Media+

b. only 26 Mio. EUR dedicated to support of European production (equivalent to 1/2 of average production budget for a US major firm (54 Mio. USD);

   18,1 Mio. EUR (Eurimages) potentially shared by 26 countries;

   8 Mio. EUR (NFTV) shared by 5 Nordic countries; producers from these countries are the one that potentially have access to most funds (members in all three since start).

c. Eurimages supports only film; Media+ and NFTV cover development, distribution and training. NFTV also includes support to TV-drama, series, and animation.

d. Since 1998-99 all three European funds have undergone major revamp/revisions:
   1. Eurimages: 2 scheme-system
   2. Media+ (2001-2005)
   3. NFTV (1997/98)

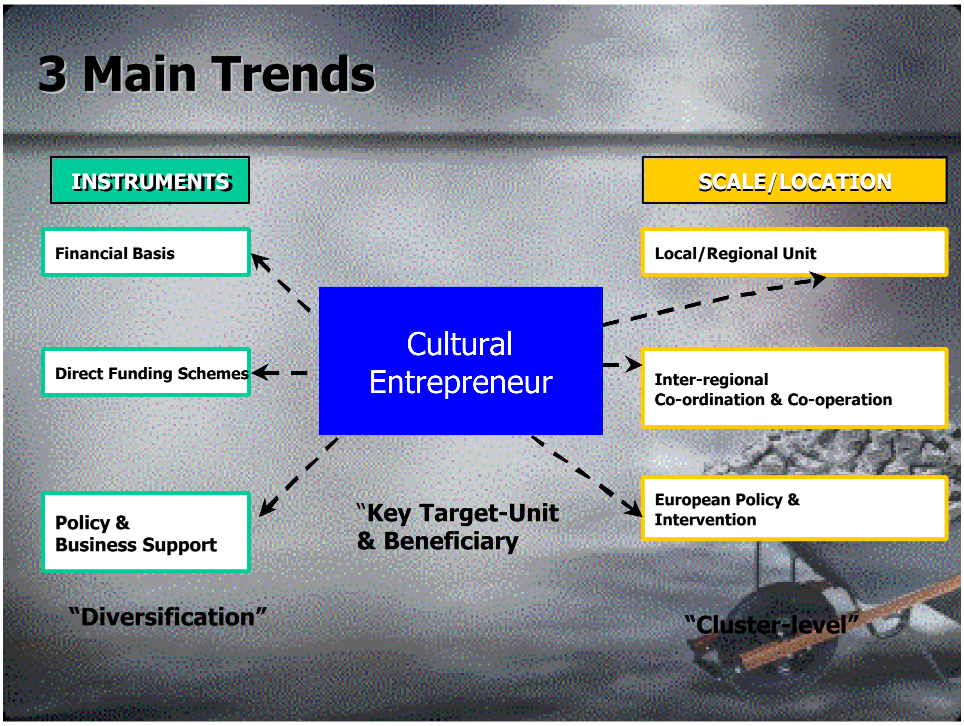
e. The film and audiovisual industry can also benefit from other European Union programmes:
   1. BEI "i2i Audiovisual" (12/2000)
   2. E-Europe (E-learning, E-commerce, E-content), (4/2000)
   3. Structural funds (infrastructure, funding)
   4. EURO-Med, PHARE/TACIS (Eastern/Central Europe)

Value in financial terms higher than 3 traditional AV/film production funds at European level.

2. Structural/Operational Changes in the Funding Landscape and Philosophy

Three main trends can be read as part of a global development dynamic, organised around the "cultural entrepreneur" (e.g. producer/producer comp.) as a key-unit and beneficiary.

A. "Cultural entrepreneur"



1. high level of project-based activity and risk-taking
2. has very specific and "localised" needs especially in early stages of development of projects and companies

B. "Diversification of instruments"

1. cover various segments of value multiple risk-taking chain (diversification/enlargement funding palette and state funding);
2. business support and counselling.

C. "Scale / Location of Business Environment / Industry upon which Funding Schemes Aim to Have Economic/Social Impact"

1. Cluster => geographically localised chain of economic activity, e.g.:
   - Temple Bar (IE/Dublin)
   - London area
   - Bayern/Münich
2. Inter-regional co-ordination & co-operation
   a. between important "clusters" or cross-border between geographically close "local industries";
   b. in regions where there is historical, cultural/institutional tradition for collaboration/networking (e.g. Nordic countries);

3. European policy / Intervention
   a. co-ordination
   b. levelling-off of differences/discrepancies between countries/regions

Development scenarios for "cultural entrepreneurs" constitute an important tool to understand where the priorities for public intervention will lie in the future. The "Scenario" methodology developed by global business networks and recently used to analyse development scenarios in 4 key areas of cultural industries in DK (2000).

Allows for mapping of Strengths, Weaknesses, Opportunities, Threats (SWOT).

A. Four Types of Development Strategies

1. The gazelle

Characteristic of dynamic Independent-sector + product/content innovation
e.g.: Danish + Irish production sector

2. The humming bee

Low-budget/no budget, Blair-Witch-type productions; more frequent in multimedia/IT segments; "start-up" mind set.

3. The lion

Research/development/experimentation done by Independents controlled/owned by the big players, who are the one deciding on access to capital and distribution channels.
Vivendi--Universal type scenario.

4. The sea-turtle

Scenario present either in periods of economic reconversion/privatisation of state-owned production structures as transition towards either lion or humming bee, or in period/situation of artistic/creative stagnations.
There is a high degree of dependency upon outside resources, and in particular upon public funding sources, for the cultural entrepreneur.

Main Challenges

A. Two Challenges with <u>Direct</u> Influence and Impact

1. Market Dynamics / Revenue Flows

a. Access to capital and control of distribution and revenue streams => two most important strategic points for development of production companies operating on viable economic basis.

b. These are also the key points where intervention from public support can guarantee cultural diversity of the output.
   - Schemes aimed at facilitating access to private/risk capital important.
   - Ditto: distribution/circulation measures.

2. International/Regional Trade Negotiation & Regulation

a. EU-discussions/guidelines on state aid for AV industry:
   - 12/2/2001 resolution: confirms relevance + need of national support

b. WTO-negotiations / new round starting
c. Discussions = bilateral negotiation strategy of US in the "Americas". Negotiations may have impact / set precedence for WTO rules.

All of these process may affect/limit development of national/regional support.

B. Important <u>Indirect</u> Challenge

Digital technology

⇨ Product/content innovation (gazette)
⇨ Distribution/cost-reductions (all other scenarios)
⇨ Opportunity as much as threat

Increased Need for Comparative Monitoring and Analysis of Public Funding Sources and Policies

Public support policies/schemes are not only under increased pressure and demand. They also have to "deliver" tangible results and concrete impact on sector within a shorter time-span.

Consequences:

a. need to <u>evaluate effects</u> of individual schemes at regular intervals poses the question of objective "performance measures".
b. Need to <u>compose/benchmark</u> effects/organisation of different national frameworks and/or between individual organisations operating in same field.
c. Need for "entrepreneurs" to keep track of changes in funding landscapes without having to spend too much time.

Note for a. and b.: policymakers, industry representatives, fund admin.

European Audiovisual Observatory Online Funding Database

A. Covers direct funding measures in Observatory member states.
B. Covers structure organisation, financial flows, funding profiles
C. Based on in-depth analysis/processing of financial data (1996-2001):

- Annual reports, budgets;
- Key-documentation (guidelines, etc.)
- Interviews/direct exchange with fund administrators.

How is the support system organized in France ?

Benoît DANARD
Head of the research and statistics department

April 4th 2001

1

The National Center for Cinema

- The CNC is a public entity under the authority of the Ministry of Culture and Communication. The CNC is active in three main areas:
- the economics of films and television production;
- cultural action, training in the motion picture arts and sciences and film protection;
- the development of international relations and the promotion of cinema in general.

2 2

The National Center for Cinema

- The CNC administrates the state support fund for the cinema and the television industry.
- In the cinema sector, the CNC allocates aid for production, distribution and exhibition of films and in support of technical industries.
- In the television sector, the CNC assists the television production (fiction, animation, documentary,…).
- In both sectors, it goes to support film festival, the promotion of french film festivals, the promotion of french programs, and films abroad. Since 1993, it has also supported video.

3 3

National Center for Cinema (CNC)

- Created by the law of 25 october 1946
- 450 employees
- Budget 3 billions of Francs in 2000
- 2,6 billions of francs from taxes

- taxes on admissions	627 MF
- taxes on TV	1 889 MF
- taxes on Video	90 MF

- 219 MF grants from Ministry of Culture

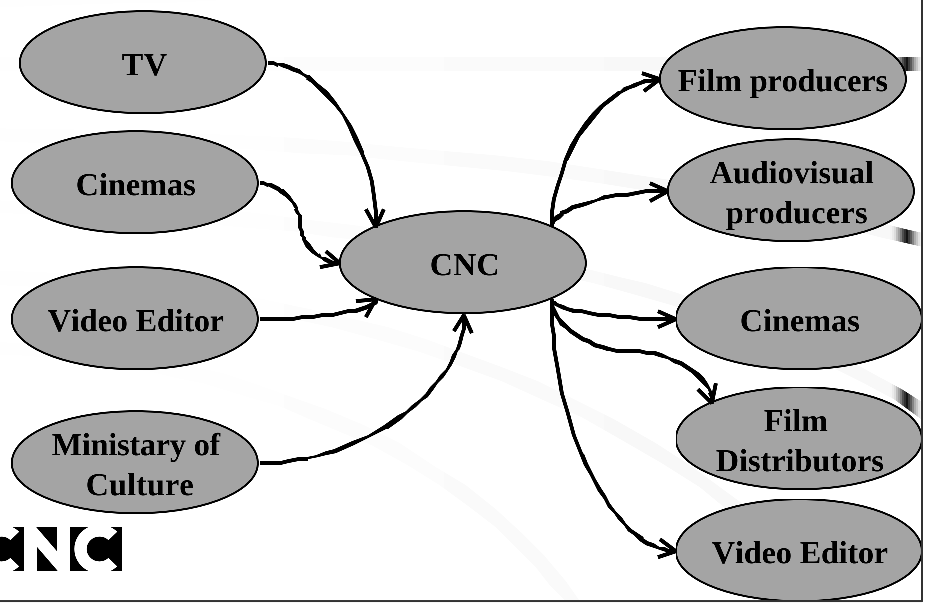
4

The market finances the fund system

- The revenue of the aid system comes mainly from industry taxes on :
  - TV revenue (private and public) 5,5 % of advertising revenue, licence fee revenue and pay TV revenue,
  - cinema ticket (11% of public price),
  - Video producers (2% of their incomes),
- The Ministry of Culture allocates also around 7 % of the CNC budget.

5

The market finances the fund system



The CNC redistributes the add value

- The CNC is financed by companies which are in direct relation with the final consumer. All taxes concerne distribution companies who have an important market power on the french program industry.
- The aim of the french aid system is to create the economic condition of a dynamic and independante programs industry.
- How to get this objective ?

CNC 7

How to develop a national programs industry

- The feature film industry is usually assimilated as a prototype industry where keys of success are difficult to find.
- The aid system helps the producer to secure their investment.

CNC 8

Two system of supports

- There are automatic supports and selective subsidies.
- The automatic support is allocated in regard of the economic result of the film in admission, on TV and in video,
- The selective subsidies are allocated in regard of artistic and cultural interest of the film.
- For feature film 30 % of aids are allocated by selective subsidies. 70 % are automatic aids.
- For TV program 25 % of aids are allocated by selective subsidies. 75 % are automatic aids

CNC

9

Two system of supports

- The amount of selective subsidies is proposed by a commission composed by representatives of professionals.
- The president of the CNC generally follows the proposal of the commission. But he can allocates a different amount.

CNC

10

The support fund budget 2000

• Cinema	1 334MF
Advances on receipts	145 MF
Other selective support	283 MF
Automatic	
Production and distribution	524 MF
Exhibition	359 MF
Video	23 MF

11

The support fund budget 2000

• Audiovisual programs	1 166 MF
Automatic support	865 MF
Selective support	283 MF
Support for export and technical industries	18 MF

12

Public support for cinema industry

- Automatic support granted to producers is caculated on the basis of their films box office, on TV result and on video sales.
- Support granted to distributors is based on the performance of films at the box office, providing that there are french films or french majority coproductions.

CNC

13

Public support for cinema industry

- Support granted to exhibitors is based on the collected amount of ticket tax.
- The support is granted for equipment or refurbishing as well as for construction of screening rooms.
- Support for printing copies of films (for rural cinema or those in small and medium size towns).

CNC

14

Selective subsidies

- The system of advances on receipt for feature film production wa started in 1959. Films are selected by a commission for advance on ticket sales on the basis of the script.
- The support consists of an interest fee loan repayable with the film ’s receipts.
- These subsidies are particulaly dedicated to the first film of a producer.

CNC

15

Selective support

- The purpose of selective distribution subsidies is to support independant distributors whose activity plays an important role in the diversity of french cinema.
- There are also selective support to exhibitors for modernizing and constructing cinemas in rural areas.
- Support for short film production.

CNC

16

Agreement with local authorities

- The CNC has developped a cooperation with local authorities in order to support exhbition, production, distribution
- Since 1989 168 agreements have been signed with 134 local authorities on an overall budget of 57 MF.
- The CNC supports half of the budget.

17

Production in regional areas

- The CNC has continued its efforts with 8 of France regions to encourage cinema and television production. Since 1997, the budget of this support is 16,5 MF.
- The CNC supports the development of a national network of local films commissions which help producers in shooting their films.

18

Dutch Federation for Cinematography

- **Umbrella organization for unions of <u>producers</u>, <u>distributors</u> and <u>exhibitors</u> – NFC is financed by their contributions**

- **NFC supports the industry by services and by maintaining relations with policy makers and other stakeholders**

Basic figures for the Netherlands

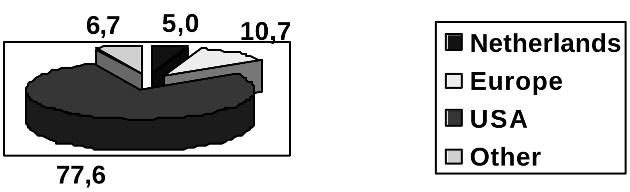
	1997	1998	1999	2000
Gross Box Office (mln Euro)	105,4	116,5	104,6	128,4
Admissions (mln.)	18,9	20,1	18,6	21,6
Population (mln.)	15,6	15,7	15,8	15,9
Admission per capita	1,21	1,28	1,18	1,36
Average ticket price (Euro)	5,58	5,79	5,63	5,95
% GBO of Top 20 films	56,9	60,9	52,4	48,0
New releases	227	232	247	272
idem with minimum of 10 prints	94	105	118	134
average amount of prints per title	19,8	22	21,9	23,3
cinemas*	156	154	149	150
screens	444	461	461	502
seats (x 1000)	89	92,7	92,7	100
average nr. of screens per cinema	2,8	3	3,1	3,3
average nr. of seats per screen	200	201	201	199
* in 2000 there were 31 municipal cinemas with 60 screens and 5200 seats - not included				

Film releases in the Netherlands

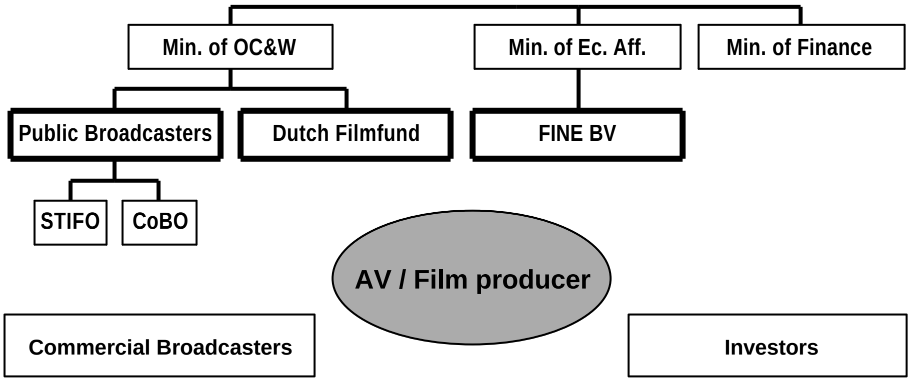
	1997	1998	1999	2000
Number of released titles	227	232	247	272
Of which Dutch releases	28	34	30	34
Of which Dutch feature films	13	22	22	23
Admissions all films (x mln)	18,9	20,1	18,6	21,6
Admissions Dutch releases	0,6	1,1	0,6	0,4
Admissions Dutch feature films	0,6	1,1	0,6	0,4
Admissions all Dutch films screened	0,7	1,2	1,0	1,1
Gross BO all films (x mln Euro)	105,4	116,5	104,6	128,4
Gross BO Dutch releases	3,2	3,2	3,2	2,3
Gross BO Ducth feature films	2,7	3,2	2,7	2,3
Gross BO all Dutch films screened	3,6	6,4	5,0	6,4

Market shares nationalities / GBO, 2000

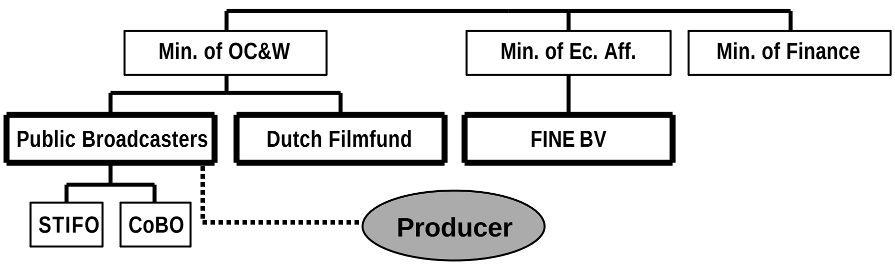
	Titles	Prints	% all prints		MS all films
Netherlands	34	256	4,0%		5,0%
Europe	92	985	15,5%		10,7%
USA	125	4 820	76,0%		77,6%
Other	21	285	4,5%		6,7%
Total	272	6 346	100,0%		100,0%



Principal Funding Bodies



Public Broadcasters



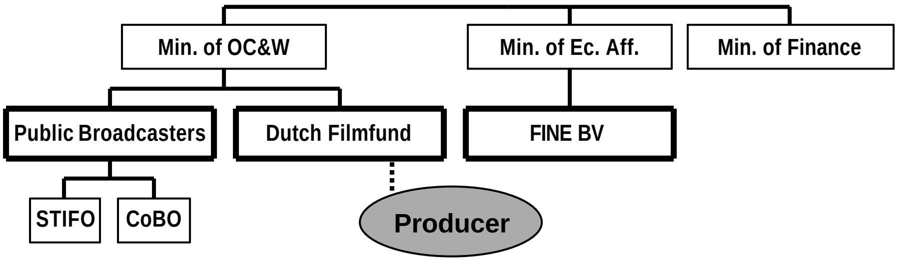
Receive income from Min. OC&W (ca. 635.3 mln Euro) and commercials (ca. 226.9 mln. Euro)

1999: 25% of programming should be produced by ind. producers.

STIFO, foundation aimed at stimulating Dutch cultural tv / radio productions

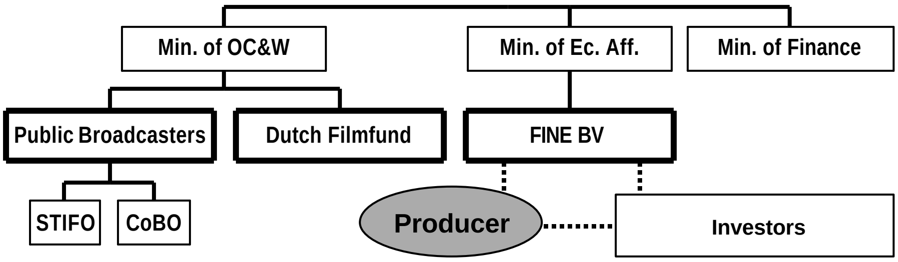
CoBO, coproduction fund for public broadcasters

Dutch Film Fund



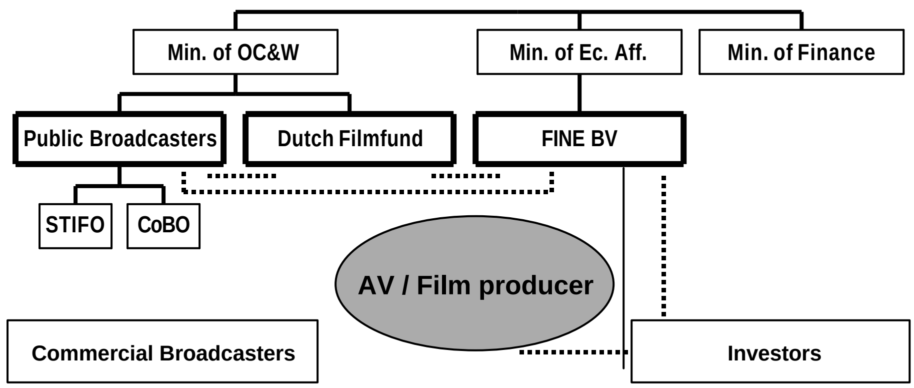
	2001(EUR)	2002(EUR)	2003(EUR)	2004(EUR)
Budget (structural)	9 363 755	9 318 490	9 182 129	9 409 133
Budget (additional)	5 577 186	7 008 409	7 826 120	8 248 136
TOTAL	14 940 941	16 326 899	17 008 249	17 657 269

FINE BV – Film Investors Neth.

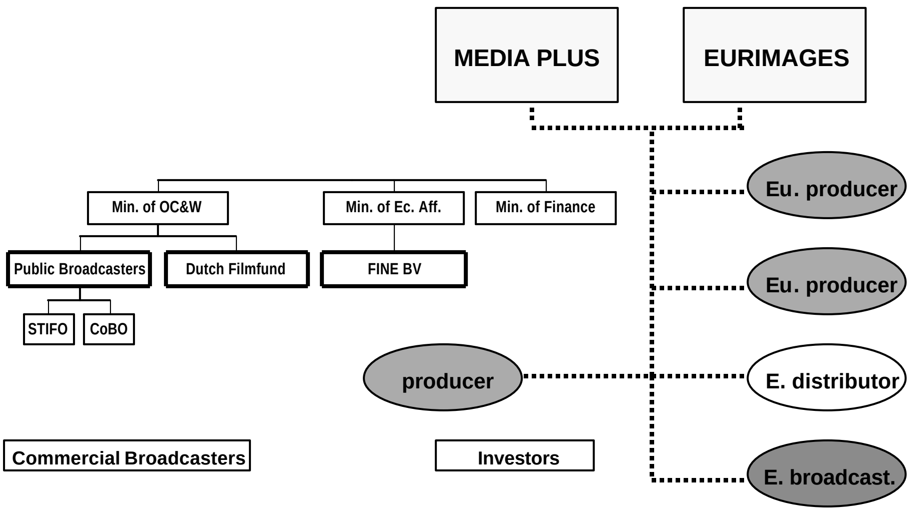


	CV projects	Production costs (mln. E.)
1999	17	73,136
2000	23	172,509

Cooperation in Dutch film financing



European Production Funding - Media Plus and Eurimages



Looking ahead

- Weaknesses
  - small domestic market
  - continuity in production
  - international competition
  - fragmentation of the branche
- Strengths
  - successful tv production companies
  - expertise and experience
  - fiscal regulations pushed international competence
  - marketing research developing
- Threats
  - coping with new technologies and economic changes
  - new competition of leisure time activities
- Opportunities
  - new strategic alliances
  - succesfull business creates room for adaption
  - new concepts - 'tell me a story' to 'let me play'
  - global market - new business models

Website URL's

Eurimages
http://culture.coe.fr/Eurimages

Media Plus
http://europa.eu.int/comm/avpolicy/info_en.htm

FINE BV
http://www.fine.nl

Dutch Film Fund
http://www.filmfund.nl

Dutch Public Broadcasters
http://www.omroep.nl

Annexes

Annexe 1

EXECUTIVE SUMMARY OF THE REPORT " ORGANISATION OF STATISTICS COLLECTION ON THE AUDIOVISUAL INDUSTRY IN TURKEY", EUROPEAN AUDIOVISUAL OBSERVATORY, JUNE 1999

The Ministry of Culture of Turkey has requested the European Audiovisual Observatory to advise it on the improvement of statistics collection on the audiovisual industry.

This report is communicated as the result of a first investigation of the Observatory, following the mission of André Lange, Expert (Market Information) in Turkey (28 May – 1 June 1999).

The experience of the European Audiovisual Observatory in collecting information and data in Turkey, as well the mission, have indicated the following :

Need for a Turkish antenna of information on the audiovisual sector

- There is a general need of improvement in the accessibility of information on the audiovisual sector in Turkey. This need is perceived both by the Observatory experts, partners and members of the professional network as well as by Turkish professionals themselves. Improvements could be reached by the creation of an information antenna serving as an interface between Turkey and professionals abroad and by the development of the Ministry of Culture website (by including on the site publication of legal texts, information of film policy, funds,...) in Turkish and in English.

Market information and statistics

- In the specific field of audiovisual statistics, the Observatory has at its disposal information from various sources (State Institute for Statistics, RTÜK, MDB project of the Ankara University, AMPECS, AGB Anadolou, TRT). Methodological improvements seem necessary to upgrade the coverage of the variables at the level of generally recognized standards. Some checking by the Observatory with Turkish sources seems also necessary before publication of data in the *Statistical Yearbook*.

- There is a need for better coordination between the various national sources in the audiovisual sector. To establish a long-term policy, the Ministry should commission a report from a Turkish independent expert, in charge of considering the various possible options.

- The publication in Turkish and English of an annual report on the development of the markets (film, television, video, new media), written in a collaboration process between the competent administrations, professionnal organisations and independent experts would be very useful for the further development of the Turkish audiovisual policy and for a better understanding of the Turkish market by foreign professionals. The Observatory recommends that such a report be instituted and an infrastructure for collection of data be established as soon as possible.

- It may be useful that the State Statistics Institute participate as observer to the work of EUROSTAT in the perspective of establishing an European infrastructure for statistics and related sectors as adopted by the EU Council of Ministers the 26 April 1999.

- The European Audiovisual Observatory is at the further disposal of the Ministry and Turkish experts for more detailled advice on methodology, definitions, etc. In collaboration with EUROSTAT, the Observatory is currently preparing guidelines for national organisations in charge of data collection in the audiovisual sector.

- Statistical data collection in the audiovisual sector should not be considered *per se* but in direct relation with the general policy options (support to the national and European film industry, fight against piracy,...).

Legal information

- The mission has been the occasion to identify correspondents in the legal field both in the Ministry and in the RTÜK. Contributions to the Observatory's newsletter *IRIS* on legal developments in Turkey would be welcomed.

- The legal texts related to copyright and on the film industry could be published on the web site of the Ministry in Turkish and in English.

Ressource information

- The Observatory would appreciate to receive a report in English describing the film policy in Turkey (in particular the mechanisms of the supporting funds to the film production) and to publish it on its web site in its anthology on national film reports (http://www.obs.coe.int/oea/docs/00002066.htm).

Annexe 2

PRESS RELEASE

Eskisehir, Turkey, 4th April 2001

FILM INFORMATION AND STATISTICS:

A BASIC REQUIREMENT FOR THE DEVELOPMENT OF RELATIONS BETWEEN THE TURKISH FILM INDUSTRY AND OTHER EUROPEAN COUNTRIES

The European Audiovisual Observatory (Council of Europe, Strasbourg) organised in Eskesehir on 4 April 2001 a workshop on data collection and analysis for the film sector. The workshop took place within the framework of a conference on "The Audiovisual Policies and their Implementations in the European Union and Turkey" organised by the Turkish Ministry of Culture. The initiator of the conference was Mr Fikret Üçcan, Under-secretary of the Ministry of Culture, and current Chairman of the Executive Council of the European Audiovisual Observatory.

The Executive Director of the European Audiovisual Observatory, Mr Wolfgang Closs, presented the work of the organisation. "The Observatory is based in Strasbourg and functions, like its sister-organisation Eurimages, within the framework of the Council of Europe", he said, "It was set up in 1992 to collect and distribute information on the audiovisual industry, for the benefit of industry professionals. It's brief is to collect and distribute, on a Europe-wide basis, statistics, legal and market information, and information on the financing of film and audiovisual production. The membership of the Observatory currently stands at thirty-four European states and the European Union."

The Observatory invited a panel of experts to report on the various systems in use for the collection of statistical data and production information on the film sector both in Turkey and in other European countries. The workshop was chaired by Mrs. Nurgül Ogut (Assistant Chairperson, State Institute for Statistics). The current situation in Turkey was outlined firstly by Mr.Altug Isighan (Faculty of Communication, Ankara University), and then by Mr Baha Özyükseler (representing AMPEC, an organisation set up by Turkish film distributors to fight piracy). Dr. André Lange, expert and co-ordinator of statistical data collection at the Observatory, underlined the importance of an efficient statistical apparatus for the study of the various branches of the industry. He introduced one of the Observatory's most recent projects, the LUMIERE database, freely available to the public on the organisation's web site. LUMIERE provides detailed data on 7400 films released in Europe since 1996 (including 25 Turkish films). "Over a period of 5 years, Turkish films accounted for 1.7 million admissions in the European Union; this is less than the admissions to a single US blockbuster in one single country", says Lange, "but nevertheless, demonstrates clearly that there is a public for Turkish films. The 830 thousands admissions achieved for *Hamam,* directed by Ferzan Ozpetek, are worthy of note."

Mr Benoît Danard, of the French *Centre national de la cinématographie* (CNC) introduced the French data collection and support model where public organisations play a central role. The importance of this role is directly linked to the French State's strong commitment to the regulation and financing of the film sector. Mr Edwards Borsboom, representing the *Nederlandse Federatie voor de Cinematographie* (NFC), a Dutch film industry professional organisation, then took the floor. He illustrated the entirely different model for data collection and analysis in use in the Netherlands. Here the State plays a limited role in regulating and financing the film industry and all monitoring activities are the responsibility of the industry itself. Ms Lone Le Floch-Andersen, expert at the European Audiovisual Observatory, then provided an overview of the various policies and initiatives for the support of audiovisual production in Europe today.

"It is not the role of the Observatory to propose a single model for national data collection of film statistics and information in Europe", concluded Mr. Closs, "Each national industry has its own history and its own organisation. Our basic conviction is that a good system should be based on regular and efficient collaboration between all parties involved: public administrations, film professional organisations, experts from universities or specialised private consultancy companies. There should be an efficient and transparent methodological framework, adapted to the needs of the industry. Such a system should allow European partners to access information easily. We are confident that this Ministry of Culture initiative will; with the collaboration of the European Audiovisual Observatory and Turkish industry professionals, lead to important improvements and will reinforce the general position of the Turkish film industry within Europe."

European Audiovisual Observatory
76 Allée de la Robertsau

F - 67000 Strasbourg

Tel.: + 33 (0) 3 88 14 44 00   Website: http://www.obs.coe.int
Fax: + 33 (0) 3 88 14 44 19   e-mail : obs@obs.coe.int

The 10 most successful Turkish films in European Union (1996-2000)

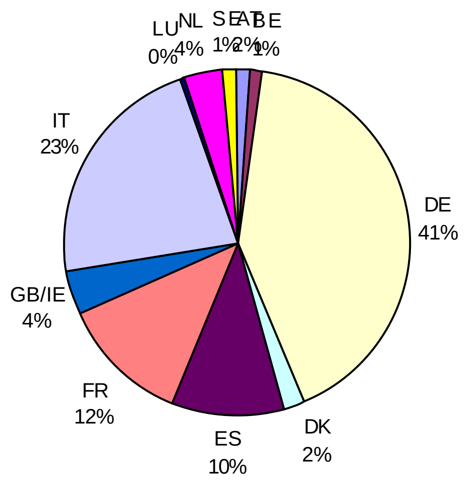
	Film	Production countries	Year of production	Director	Total Admissions European Union	AT	BE	DE	DK	ES	FR	GB/IE	IT	LU	NL	SE
1	Hamam	IT/TR/ES	1997	Ferzan Ozpetek	830 341	25 896	12 321	139 104	34 587	173 531	107 290	46 804	219 430	2 009	44 431	24 938
2	Eskiya	TR/FR/BG	1996	Yavuz Turgul	240 331			217 964			7 956	14 411				
3	Harem Suare	IT/FR/TR	1999	Ferzan Ozpetek	232 656		2 079				74 111		146 382	1 721	8 363	
4	Propaganda	TR	1998	Sinan Cetin	183 544			173 837			9 707					
5	Kahpe Bizans	TR	2000	Gani Müjde	90 732			90 732								
6	Güle, Güle	TR	2000	Zeki Ökten	51 182			51 182								
7	Günese Yolculuk	TR/DE/NL	1999	Yesim Ustaoglu	42 122			9 790			6 180	1 380	16 373		8 399	
8	Lola und Bilidikid	DE/TR/US	1998	Kutlug Ataman	21 433			16 444				4 989				
9	Masumiyet	TR	1997	Zeki Demirkubuz	2 909						2 909					
10	Redeyef 54	TR	1997	Aly Abidy	309						309					

Source : European Audiovisual Obseravtory : LUMIERE database (http://lumiere.obs.coe.int)

33443.02

BREAKDOWN OF ADMISSIONS FOR TURKISH FILMS IN EUROPEAN UNION (1996-2000)

AT	BE	DE	DK	ES	FR	GB/IE	IT	LU	NL	SE
25 896	14 400	699 053	34 587	173 531	208 771	67 584	382 185	3 730	61 193	24 938



Source : European Audiovisual Observatory / LUMIERE database http://lumiere.obs.coe.int

AVRUPA GÖRSEL-İŞİTSEL GÖZLEMEVİ
BASIN BİLDİRİSİ
ESKİŞEHİR, 4 NİSAN 2001

SİNEMA İSTATİSTİKLERİ VE BİLGİ AĞI: TÜRK SİNEMA ENDÜSTRİSİ VE DİĞER AVRUPA ÜLKELERİ ARASINDAKİ İLİŞKİLERİN GELİŞTİRİLMESİ İÇİN TEMEL BİR GEREKSİNİM

Avrupa Görsel-İşitsel Gözlemevi (Avrupa Konseyi, Strazburg 4 Nisan 2001 tarihinde Eskişehir'de sinema istatistiklerinin toplanması ve analizinde uygulanan temel modeller konulu bir atölye çalışması düzenlenmiştir. Söz konusu etkinlik T.C. Kültür Bakanlığı tarafından organize edilen "Türkiye Avrupa Birliğinde Görsel-İşitsel Politikalar ve Uygulamaları" konulu konferans çerçevesinde gerçekleştirilmiştir. Konferans Kültür Bakanlığı Müsteşarı ve Avrupa Görsel-İşitsel Gözlemevi Başkanı Fikret N. ÜÇCAN tarafından organize edilmiştir.

Avrupa Görsel-İşitsel Gözlemevi İcra Direktörü Wolfgang Closs Avrupa Görsel-İşitsel Gözlemevi ve toplantının içeriği hakkında bilgi verdi. Closs, "Avrupa Görsel-İşitsel Gözlemevinin merkezi Strazburg'dadır ve kardeş organizasyon Eurimages gibi Avrupa Konseyi çerçevesinde faaliyet gösterir. 1992 yılında sinema sektörü yararına sinema endüstrisi ile ilgili bilgi toplamak ve dağıtmak amacıyla kurulmuştur. Esas olarak görevi Avrupa çapında istatistiksel, yasal ve pazar bilgilerini ve sinema ve görsel-işitsel yapımların finansmanı ile ilgili bilgileri toplamak ve dağıtmaktır. Şu anda Gözlemevi'nin çeşitli Avrupa ve Avrupa Birliği ülkelerinden olmak üzere 34 üyesi vardır" diye belirtmiştir.

Gözlemevi, hem Türkiye hem de diğer Avrupa ülkelerindeki film sektörü hakkında istatistiksel veri ve yapım bilgilerinin toplanmasında kullanılan çeşitli sistemler hakkında bilgi vermeleri için bir grup uzmanı söz konusu panele davet etmiştir. Atölye çalışmasının başkanlığını Nurgül ÖĞÜT (Başkan Yardımcısı, T.C. Başbakanlık Devlet İstatistik Enstitüsü) yürütmüştür. Türkiye'de uygulanmakta olan sistem hakkında ilk olarak Altuğ IŞIĞAN (Ankara Üniversitesi İletişim Fakültesi) ve daha sonra Baha ÖZYÜKSELER (AMPEC)konu ile ilgili bilgi vermişlerdir.Gözlemevi'nde istatistiksel veri toplama uzmanı ve koordinatörü Dr. André LANGE endüstrinin çeşitli kollarının araştırılmasında etkin istatistiksel veri yöntemlerin önemini dile getirmiştir. Kuruluşun Web sitesinde yayınlanan ve kamunun serbestçe erişebileceği Gözlemevi'nin son projesi olan LUMIERE veritabanı projesini tanıtmıştır. LUMIERE, 1996 yılından beri Avrupa'da üretilen 7400 (25 Türk filmi dahil üzere) film hakkında ayrıntılı bilgi sunmaktadır. Dr. André LANGE, son beş yıldır Avrupa Birliği içinde Türk filmleri 1.7 milyon seyirci ile buluşmuştur. Bu oran tek bir ülkede gösterilen bir Amerikan filminin çektiği seyircinin çok altında olduğunu, ancak yine de bu rakamların Türk filmlerine toplumun bir ilgisinin olduğunu belirtmiştir. Ferhan ÖZPETEK'in yönettiği HAMAM filminin 830.000 kişi tarafından izlenmesi dikkate değer bir gelişmedir.

Fransız Ulusal Sinema Merkezi (CNC) temsilcisi Benoit DANARD kamu kuruluşlarının merkezi rol oynadığı Fransız veri toplama ve destek modellerini tanıttı. Bu kamu merkezli modellerin önemi doğrudan Fransız devletinin film sektörünün düzenlenmesi ve finanse edilmesi için gösterdiği kararlı tutumla bağlantılıdır. Daha sonra Hollanda Ulusal Sinema Merkezi (NFC), Hollanda Profesyonel Sinema Endüstrisi Kurumu temsilcisi Edward Borsboom konuşmasını sürdürdü. Hollanda'da uygulanan çeşitli veri toplama ve analiz yöntemleri hakkında çeşitli bilgi verdi. Bu model de devlet film endüstrisinin düzenlenmesi ve finanse edilmesinde sınırlı bir role sahiptir, ve tüm izleme faaliyetleri sadece endüstrinin sorumluluğundadır. Daha sonra Avrupa Görsel-İşitsel Gözlemevi uzmanı Lone Floch-Anderson günümüzde Avrupa'da görsel-işitsel yapımlara verilen destek ve çeşitli politikalar hakkında genel bir değerlendirme yapmıştır.

Wolfgang CLOSS Avrupa'daki sinema sektörü alanında istatistiksel ve bilgi toplama yöntemleri hakkında tek bir ulusal veri toplama yöntemi önermenin Gözlemevinin görevi olmadığını belirtmiştir. CLOSS ayrıca her endüstrinin kendi tarihi ve kendi örgütlenmesi olduğunu belirtmiştir.Temel görevimiz tüm taraflar, kamu yönetimlerinin, profesyonel film kuruluşları, üniversite uzmanları ve uzman özel danışmanlık şirketleri, arasında sürekli ve etkin bir işbirliğine dayanan sağlam bir sistem oluşturmaktır. Endüstrinin gereksinimlerini karşılayabilecek etkin ve şeffaf bir yöntemsel bir çerçeve oluşturmaktır. Böyle bir sistem Avrupalı tarafların bilgiye kolay bir şekilde erişmelerini sağlamalıdır. Yürekten inanıyoruz ki, Avrupa Görsel-İşitsel Gözlemevi ve Türk sinema sektörü ile işbirliği içinde Kültür Bakanlığı tarafından gerçekleştirilen bu etkinlik Türk sinema endüstrisinin Avrupa içindeki genel durumunu güçlendirecek ve önemli gelişmelerin gerçekleşmesini sağlayacaktır.

Annexe 4

Top 20 films by admissions in Turkey in 2000

	Film	Origin	Production year	Director	Admissions in 2000
1	Kahpe Bizans	TR	2000	Gani Müjde	1 644 926
2	The Sixth Sense	US	1999	M. Night Shyamalan	891 408
3	Güle, Güle	TR	2000	Zeki Ökten	701 620
4	Abuzer Kadayif	TR	2000	Tunç Basaran	619 403
5	Mission: Impossible II	US	2000	John Woo	505 520
6	Gladiator	US	2000	Ridley Scott	376 521
7	Tarzan	US	1999	Chris Buck Kevin Lima	375 492
8	Charlie's Angels	US	2000	Joseph McGinty Nichol	370 474
9	Meet The Parents	US	2000	Jay M. Roach	353 765
10	The Perfect Storm	US	2000	Wolfgang Petersen	339 855
11	What Lies Beneath	US	2000	Robert Zemeckis	339 450
12	The Green Mile	US	1999	Frank Darabont	333 784
13	James Bond: The World Is Not Enough	GB / US	1999	Michael Apted	333 610
14	Autumn in New York	US	2000	Joan Chen	317 692
15	Scary Movie	US	2000	Keenen Ivory Wayans	302 920
16	Balalayka	TR	2000		292 989
17	Gone in Sixty Seconds	US	2000	Dominic Sena	290 569
18	The Patriot	US	2000	Roland Emmerich	281 783
19	End of Days	US	1999	Peter Hyams	270 556
20	American Beauty	US	1999	Sam Mendes	264 241

Source : Sinema

Annexe 5

Top 20 European films by admission in Turkey in 2000

	Film	Origin	Year production	Director	Admissions
1	Kahpe Bizans	TR	2000	Gani Müjde	1 644 926
2	Güle, Güle	TR	2000	Zeki Ökten	701 620
3	Abuzer Kadayif	TR	2000	Tunç Basaran	619 403
4	James Bond: The World Is Not Enough	GB / US	1999	Michael Apted	333 610
5	Balalayka	TR	2000		292 989
6	Astérix et Obélix contre César	FR / DE / IT	1999	Claude Zidi	213 799
7	La neuvième porte	FR / ES	1999	Roman Polanski	132 059
8	Chicken Run	GB / US	2000	Nick Park Peter Lord	121 599
9	Jeanne d'Arc	FR	1999	Luc Besson	110 373
10	Dar alanda kisa paslasmalar	TR	2000	Serdar Akar	100 255
11	Sinir	TR	1999	Gürsel Ates	98 685
12	Snatch	GB / US	2000	Guy Ritchie	90 690
13	Duvar	TR / FR	1983	Yilmaz Güney	86 997
14	Eylül firtinasi	TR	1999	Atif Yilmaz	79 815
15	The End of the Affair	GB / US	1999	Neil Jordan	68 760
16	Oyunbozan	TR	2000	Nesli Cölgeçen	59 617
17	Günese Yolculuk	TR / DE / NL	1999	Yesim Ustaoglu	49 516
18	Dancer in the Dark	DK / FR / DE / NL	2000	Lars von Trier	47 419
19	Fasulye	TR	2000	Bora Tekay	44 771
20	Train de vie	FR / BE / NL	1998	Radu Mihaileanu	39 633

Source European Audiovisual Observatory form *Sinema* data

Annexe 6

Number of films and market share according to the country of origin of the films with first release in Turkey in 2000

Country of origin	Number of films	%	Admissions	Market shares
TR	15	8,88%	3 826 252	20,07%
GB	15	8,88%	732 717	3,84%
FR	12	7,10%	573 777	3,01%
IT	4	2,37%	90 773	0,48%
ES	3	1,78%	17 256	0,09%
IE	2	1,18%	22 898	0,12%
DE	1	0,59%	3 885	0,02%
DK	1	0,59%	47 419	0,25%
GR	1	0,59%	2 571	0,01%
Total EUR 15	**39**	**23%**	**1 491 296**	**7,8%**
Total EUR 34	**54**	**37%**	**5 317 548**	**27,9%**
US	**105**	**62,13%**	**13 195 102**	**69,20%**
AR	2	1,18%	11 055	0,06%
CA	2	1,18%	23 027	0,12%
AU	5	2,96%	279 945	1,47%
JP	1	0,59%	240 708	1,26%
Total RoW	10	5,9%	554 735	2,9%
Total	**169**	**100%**	**19 067 385**	**100%**

Source : European Audiovisual Observatory from *Sinema* data