

**THE FILM INDUSTRY
IN CENTRAL EUROPE
FILM MARKET & PUBLIC AIDS**

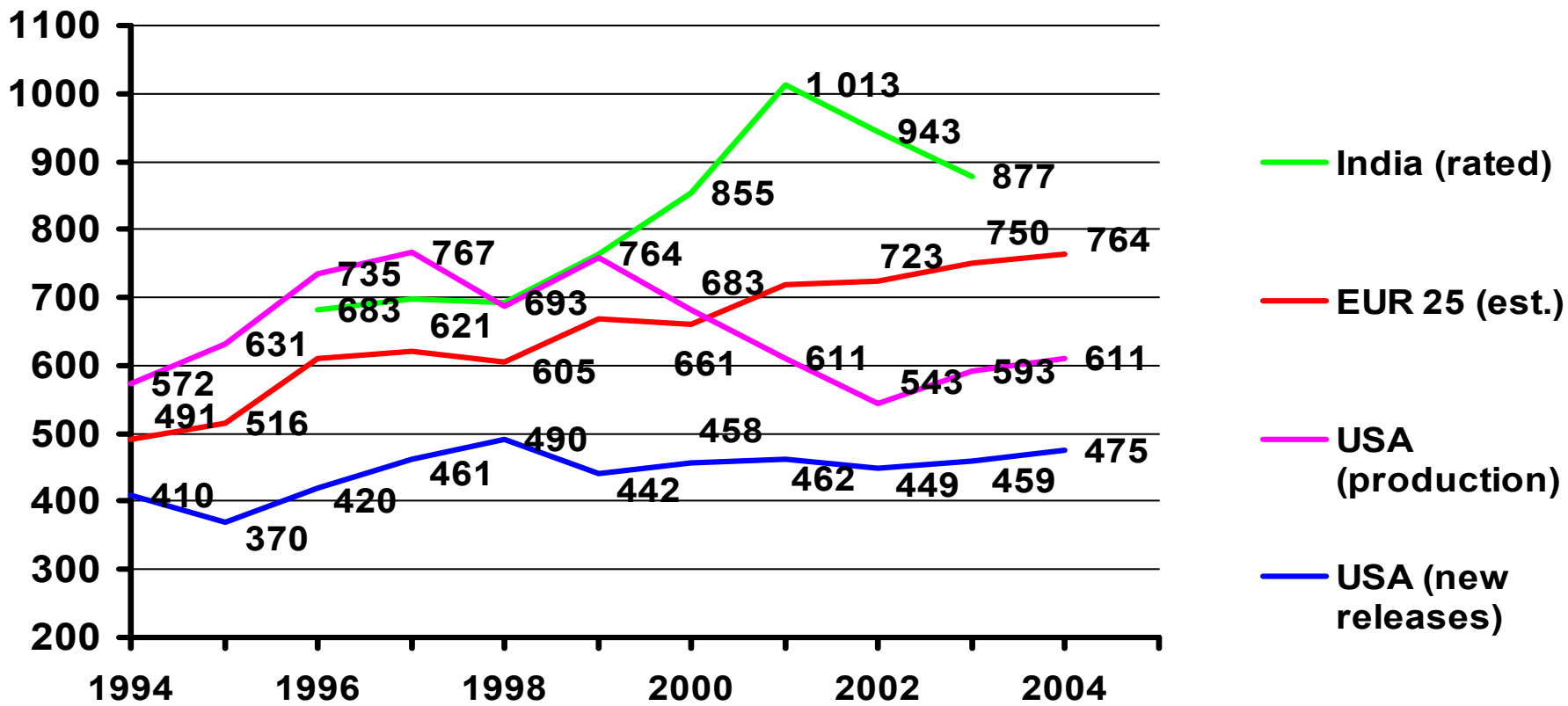
***MINISTRY OF CULTURE OF THE SLOVAK REPUBLIC
EUROPEAN AUDIOVISUAL OBSERVATORY***

***André Lange
Head of Department
Information on Markets & Financing***

**Bratislava
16th June 2005**

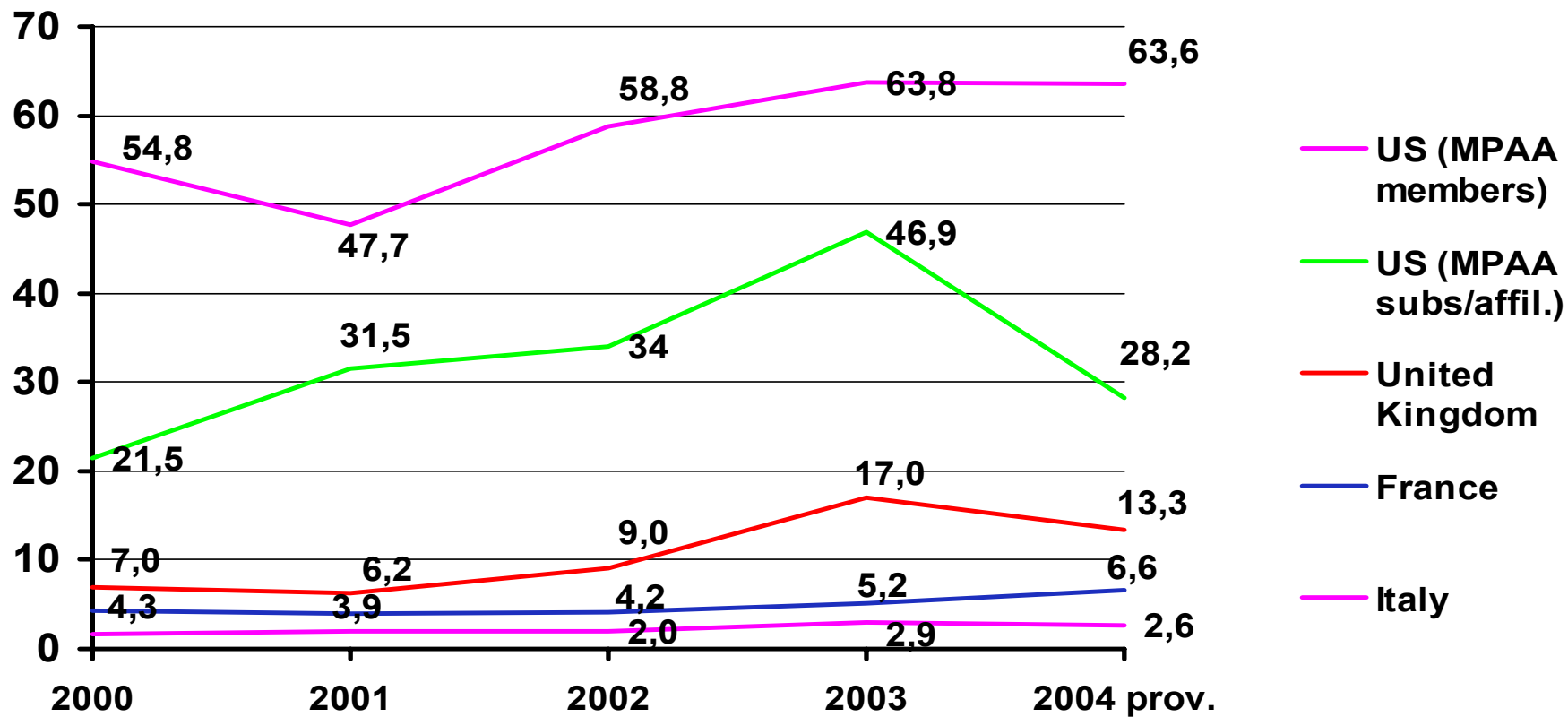
FEATURE FILM PRODUCTION IN EUROPE, INDIA AND THE UNITED STATES (1994 - 2004)

Source: European Audiovisual Observatory



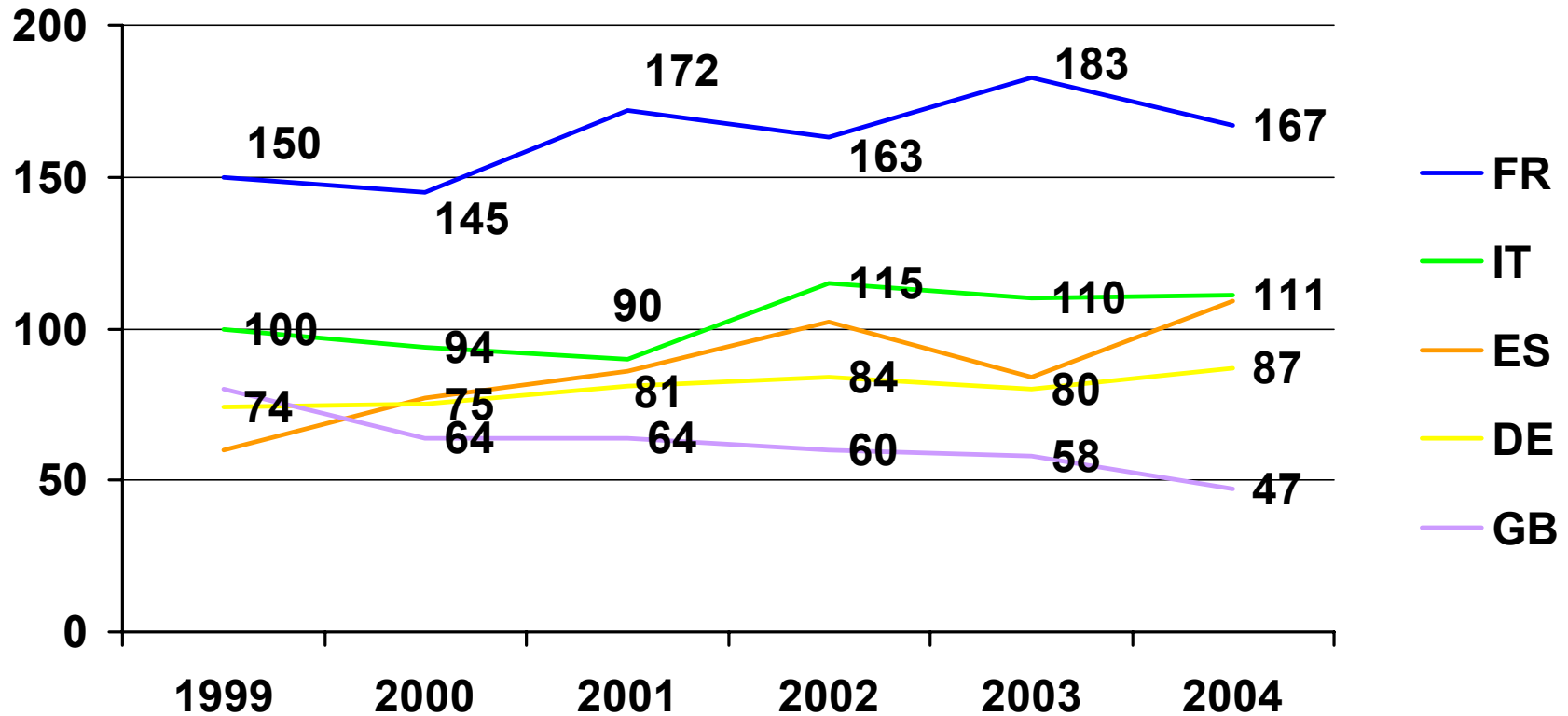
AVERAGE PRODUCTION BUDGET OF A FEATURE FILM (2000 – 2004 – in millions USD)

Source: European Audiovisual Observatory / MPAA



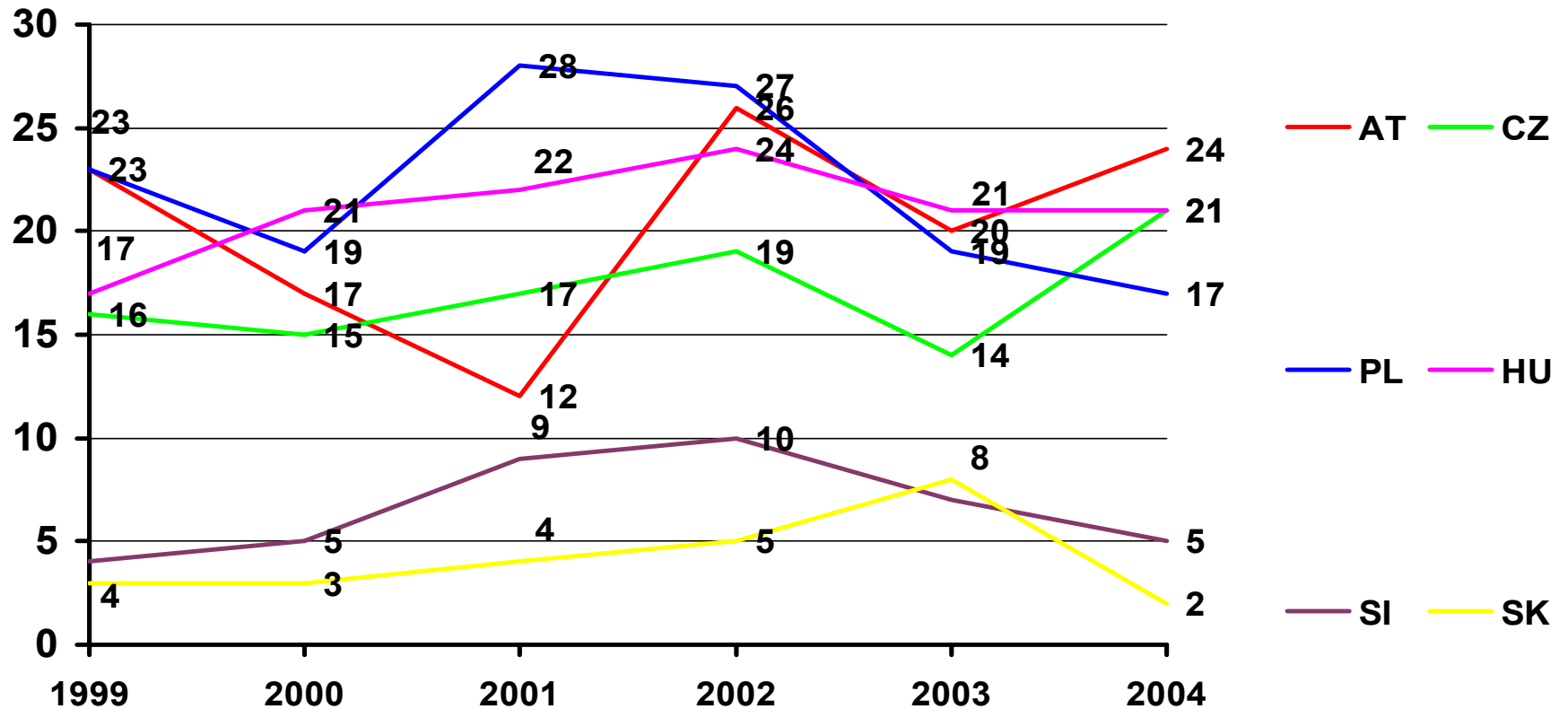
NUMBER OF FILMS PRODUCED IN THE 5 MAJOR EUROPEAN MARKETS (1999-2004)

Source: European Audiovisual Observatory



FEATURE FILM PRODUCTION IN CENTRAL EUROPEAN COUNTRIES (1999 - 2004)

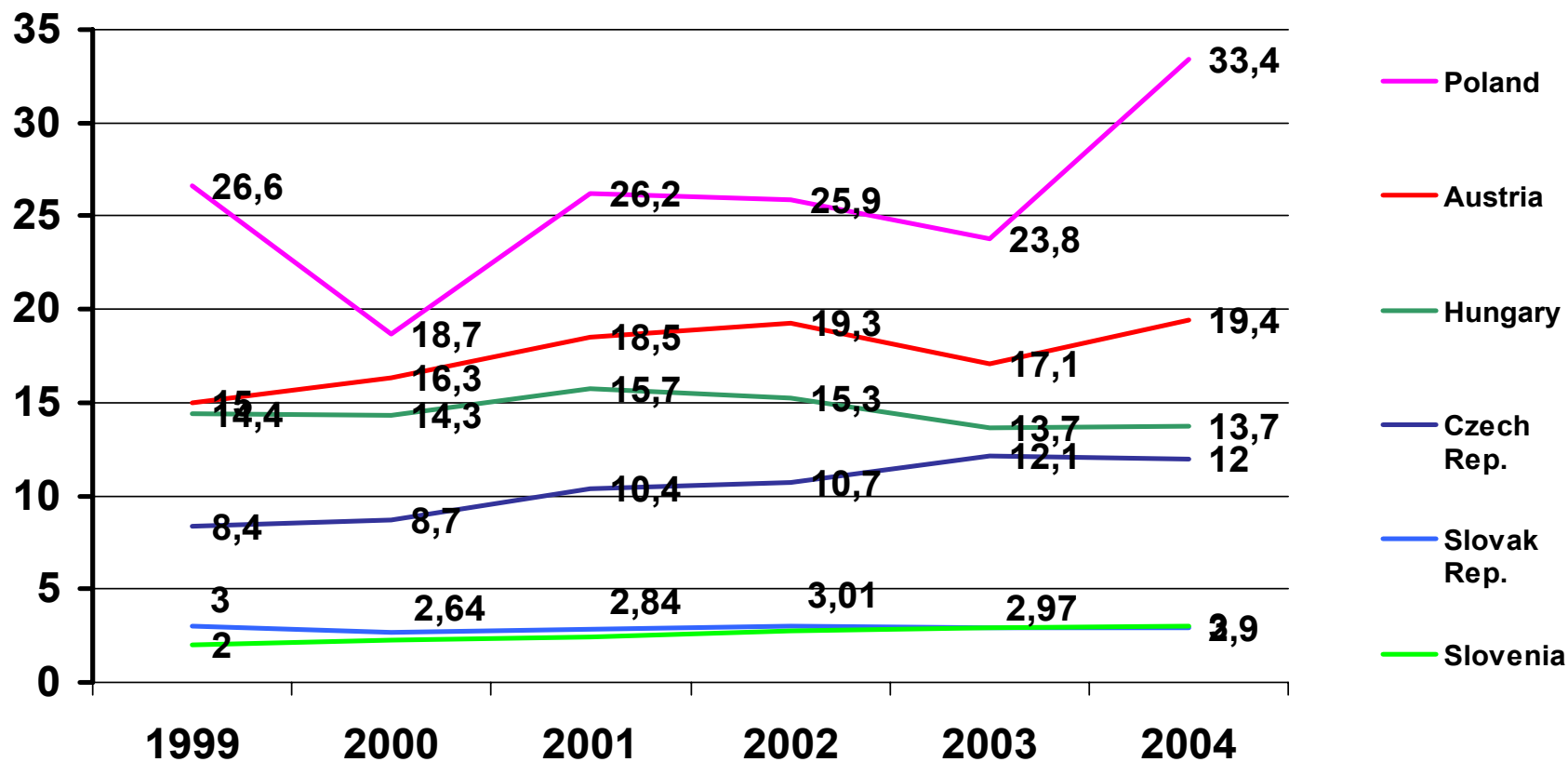
Source: European Audiovisual Observatory



CINEMA ATTENDANCE IN CENTRAL EUROPE (1999 – 2004)

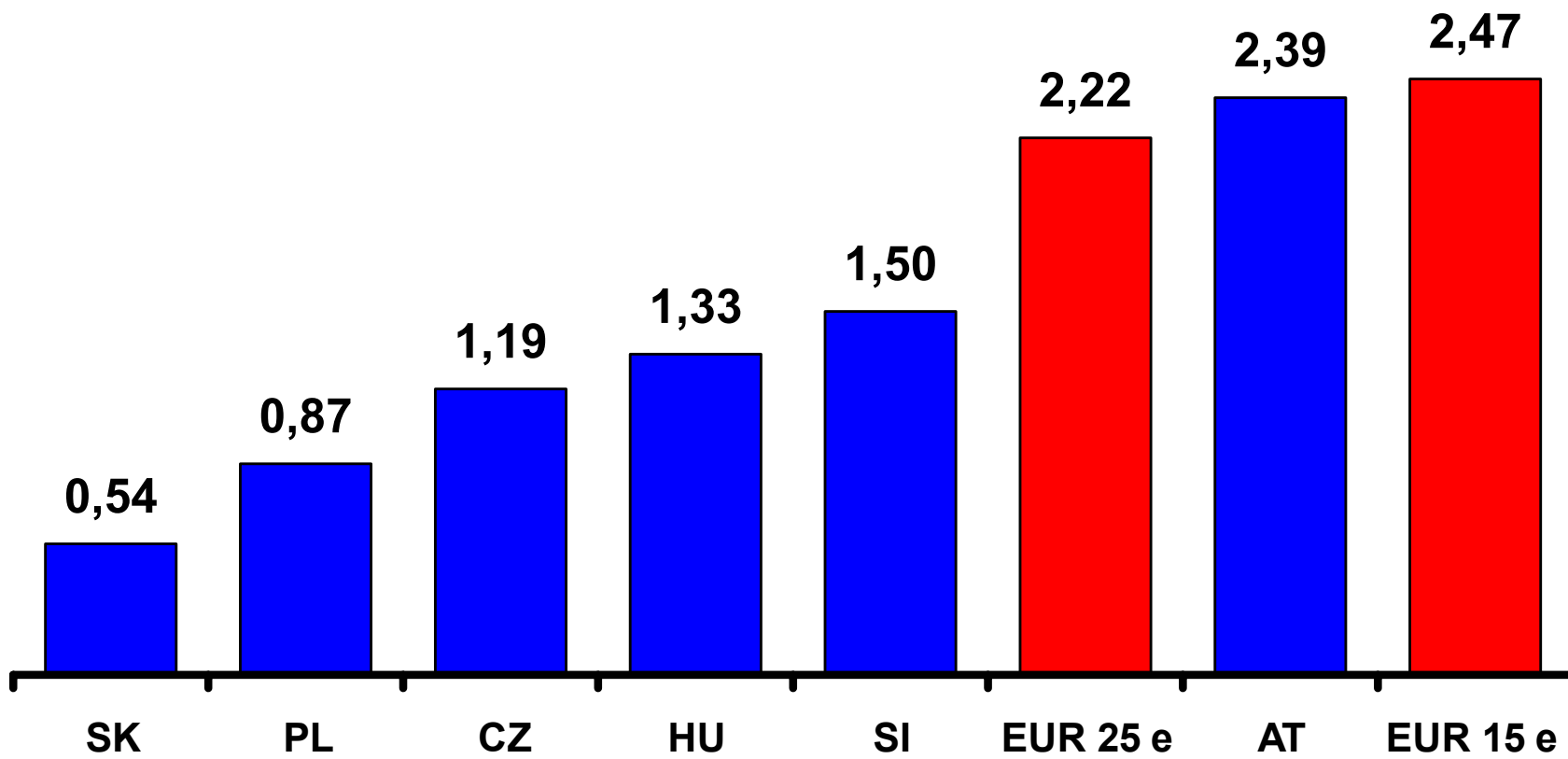
Source: European Audiovisual Observatory

In millions



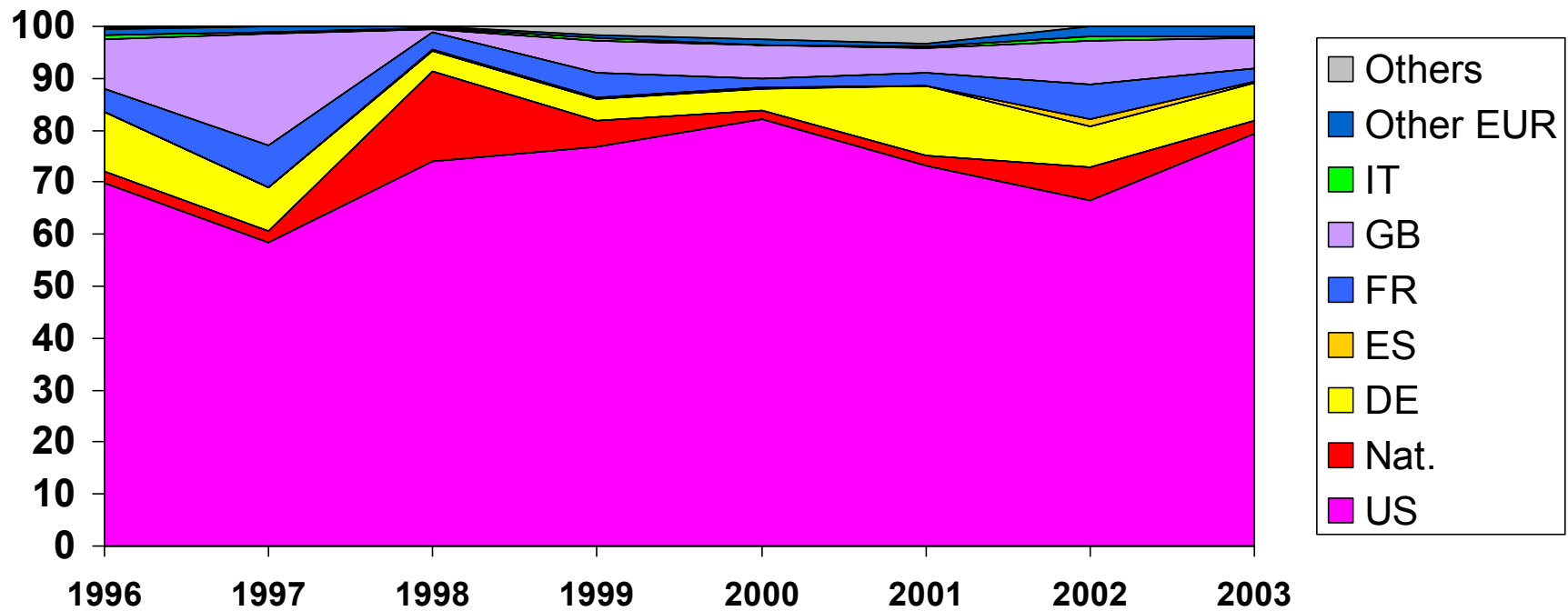
AVERAGE ADMISSIONS PER CAPITA (2004)

Source: European Audiovisual Observatory



MARKET SHARES BY ORIGIN OF FILMS RELEASED IN AUSTRIA (1996-2003)

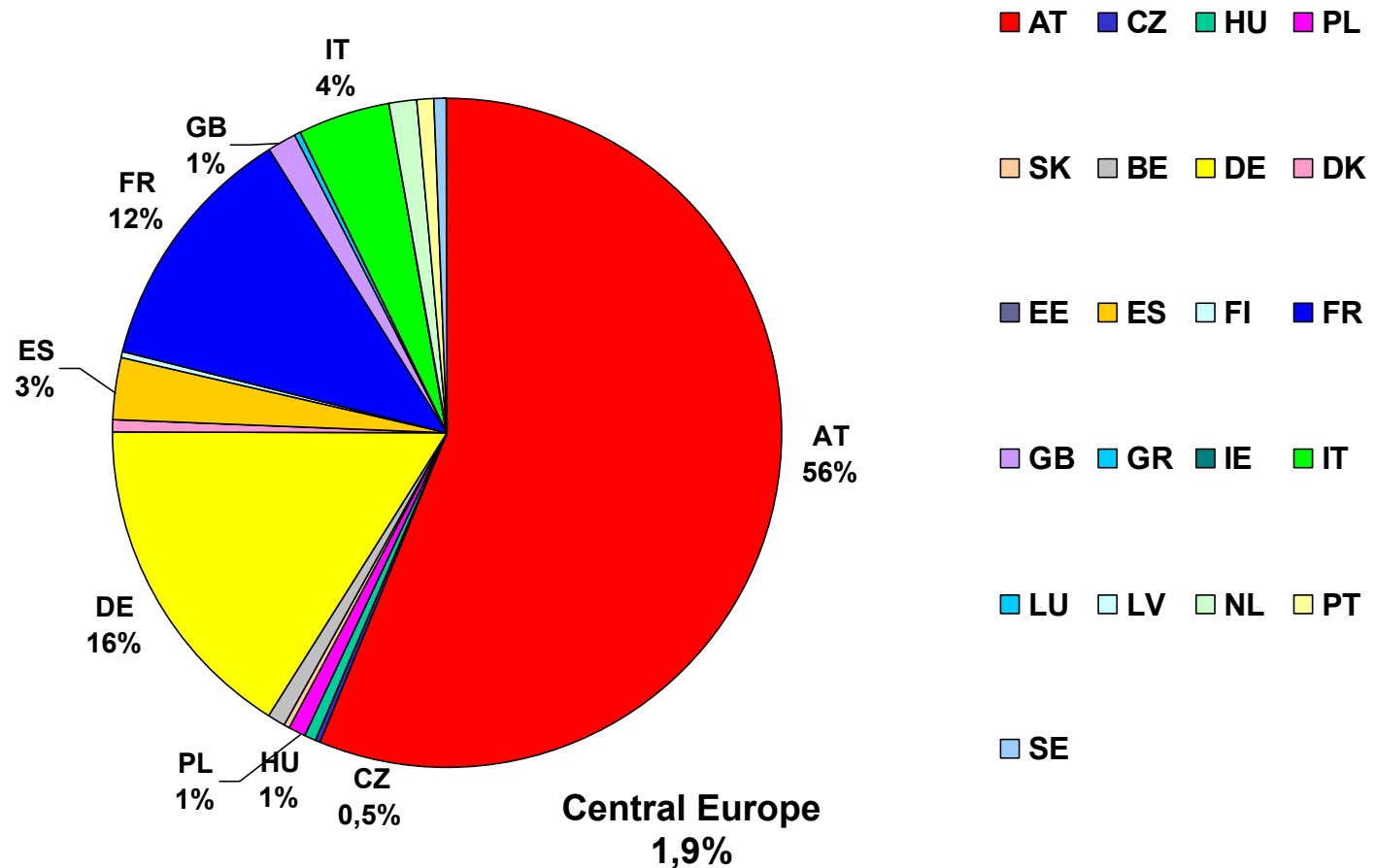
Source : OBS / LUMIERE



EUROPEAN CIRCULATION OF AUSTRIAN FILMS IN EUROPE (1996-2004)

- **102 Austrian films were released in Austria**
- **36 Austrian films were released in at least one other European country**
- **4 Austrian films were released in at least one other Central European country**

BREAKDOWN OF ADMISSIONS TO AUSTRIAN FILMS IN EUROPE (1996-2004) – 6,8 millions admissions



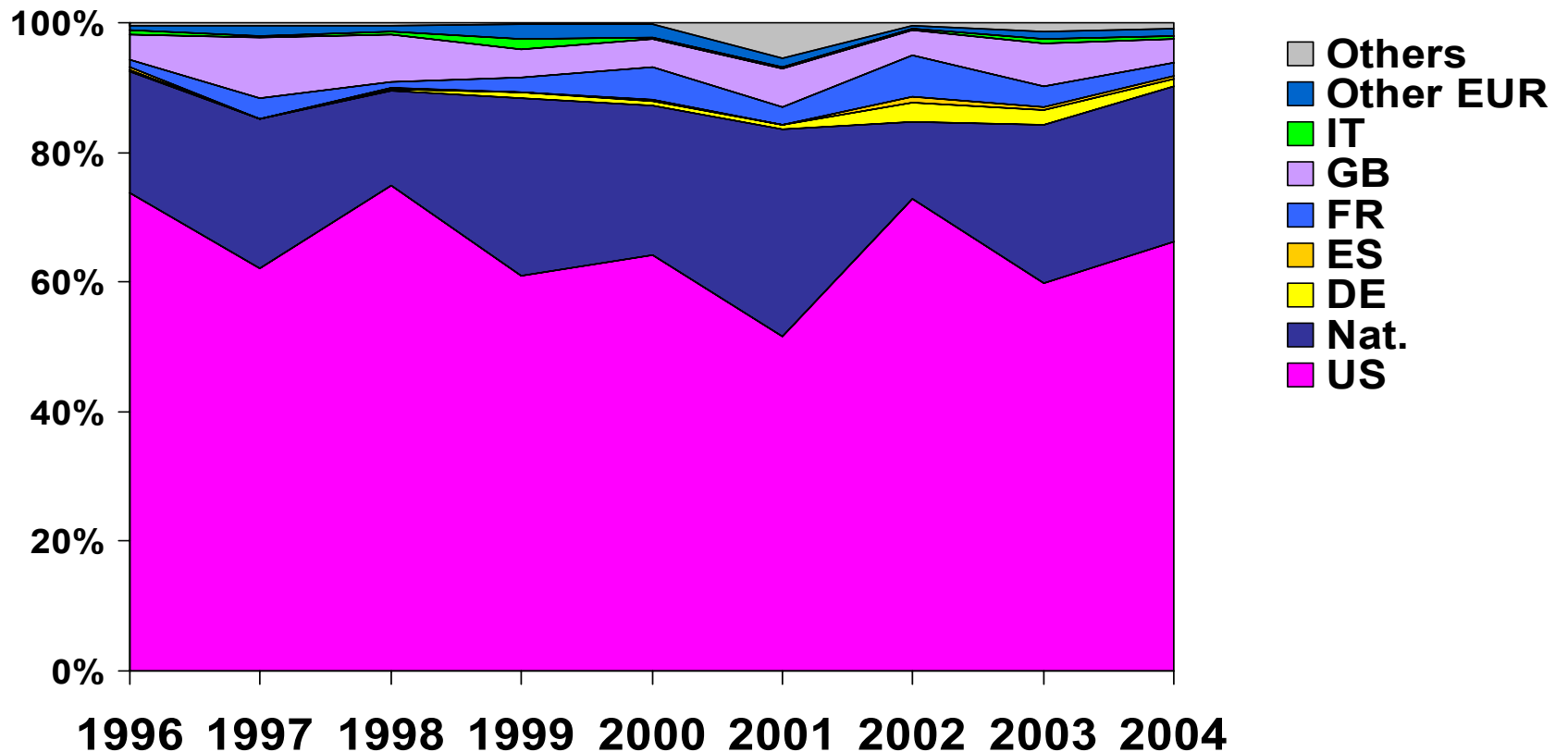
THE 5 MOST SUCCESSFUL AUSTRIAN FILMS IN EUROPE (outside Austria) (1996-2004)

Admissions
(Austrian admissions excluded)

- La pianiste (M. Haneke) 1,9 million
- Funny Games (M. Haneke) 215 000
- Hundstage (U. Seidl) 133 000
- Komm, süßer Tod (W. Murnberg) 122 000
- Die Siebtelbauern (S. Ruzowtisky) 115 000

MARKET SHARES OF ADMISSIONS IN THE CZECH REPUBLIC (1996-2004)

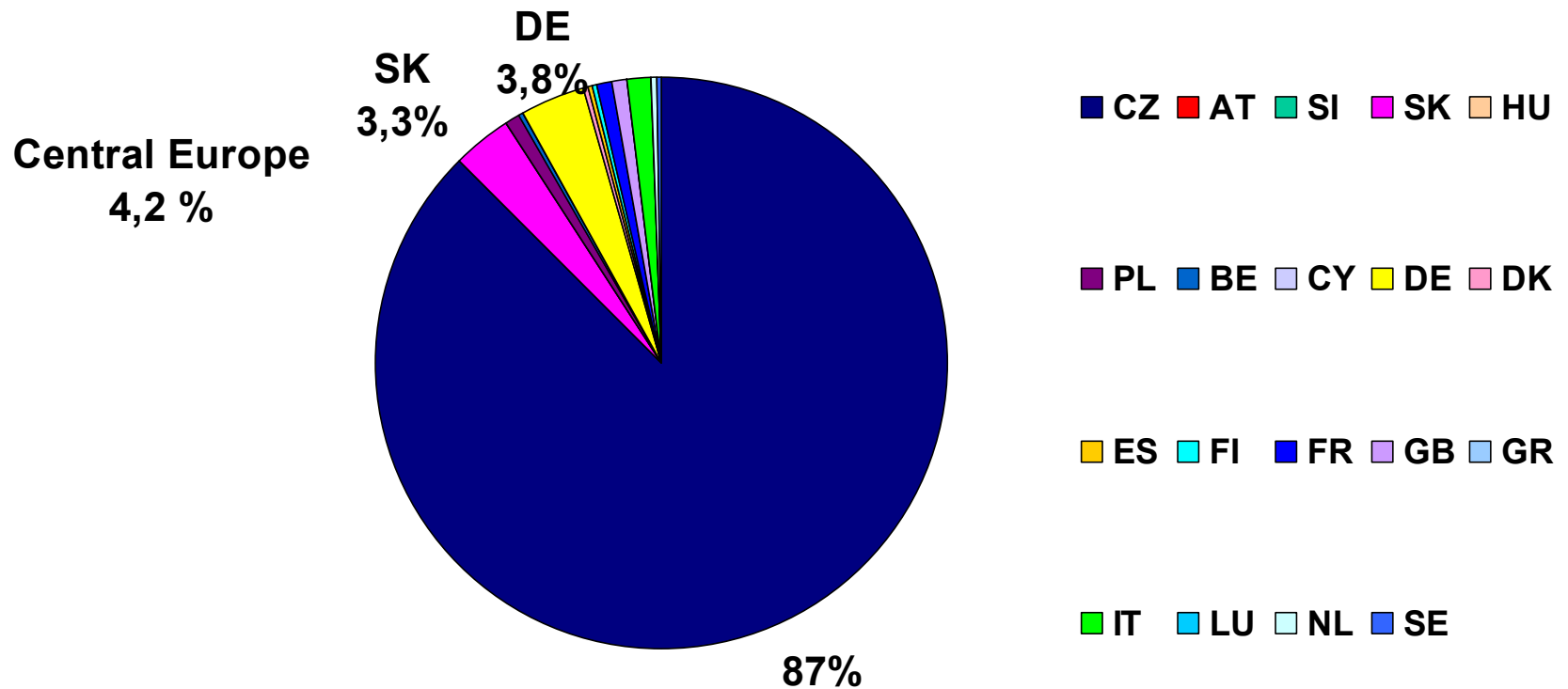
Source: European Audiovisual Observatory / LUMIERE database



CIRCULATION OF CZECH FILMS IN EUROPE (1996-2004)

- **159 films had a commercial release**
- **43 films were released in at least one other European country**
- **33 films were released in at least one other Central European country**

BREAKDOWN OF ADMISSIONS TO CZECH FILMS IN EUR 25 (1996-2004) – 20,5 millions admissions

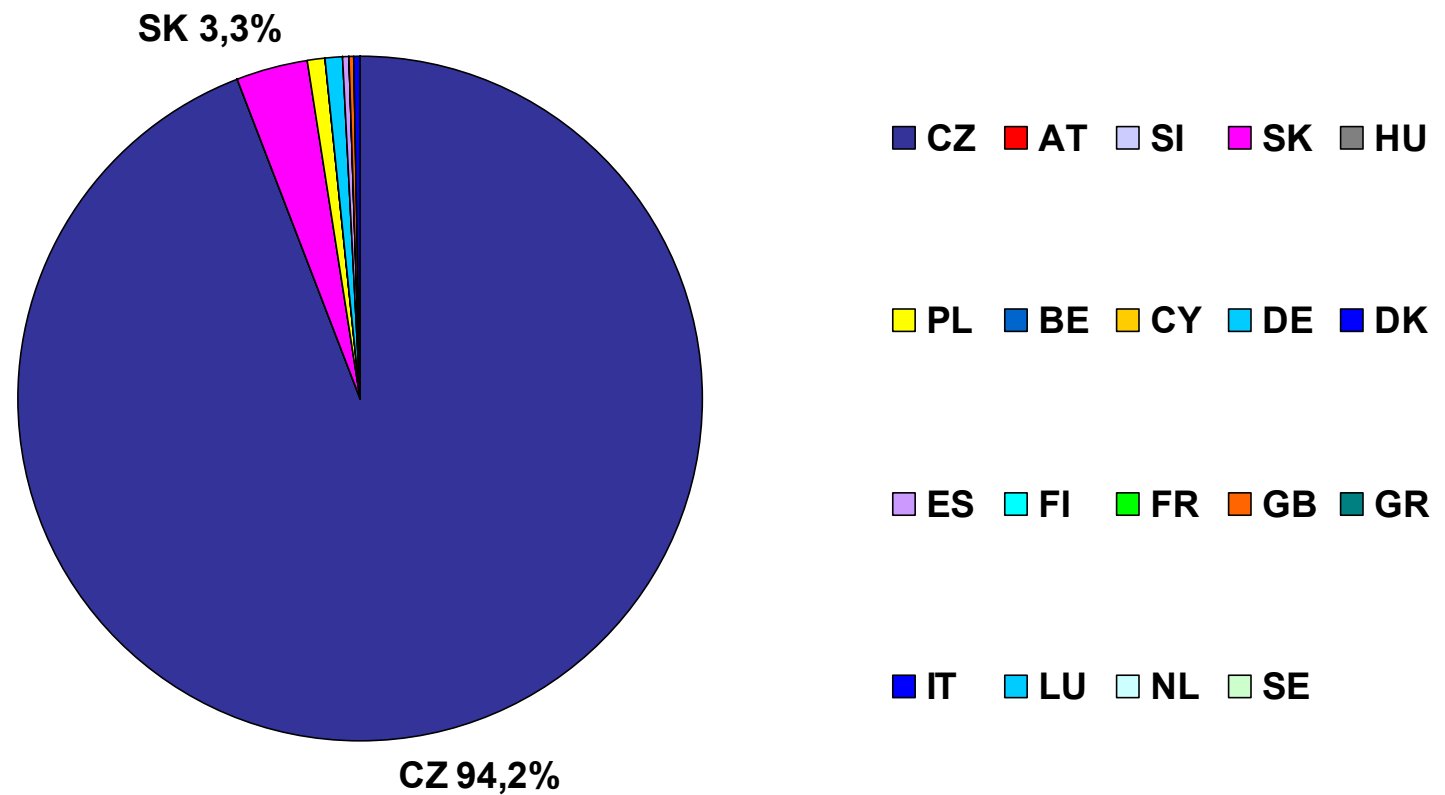


THE 5 MOST SUCCESSFUL CZECH FILMS IN EUROPE (1996-2004)

	Admissions (Czech Rep. excluded)
Kolya (Jan Sverák) CZ / FR / GB	1,6 million
Tmavomodrý svět (Dark Blue World) (Jan Sverák) CZ / DE	143 600
Musíme si pomáhat (Divided We Fall) (Jan Hřebejk) CZ	109 200
Hurá na medvěda (Bear on the Run) (Dana Vávrová) CZ / DE	99 000
Samotáři (Loners) (David Ondricek) CZ / SI	60 100

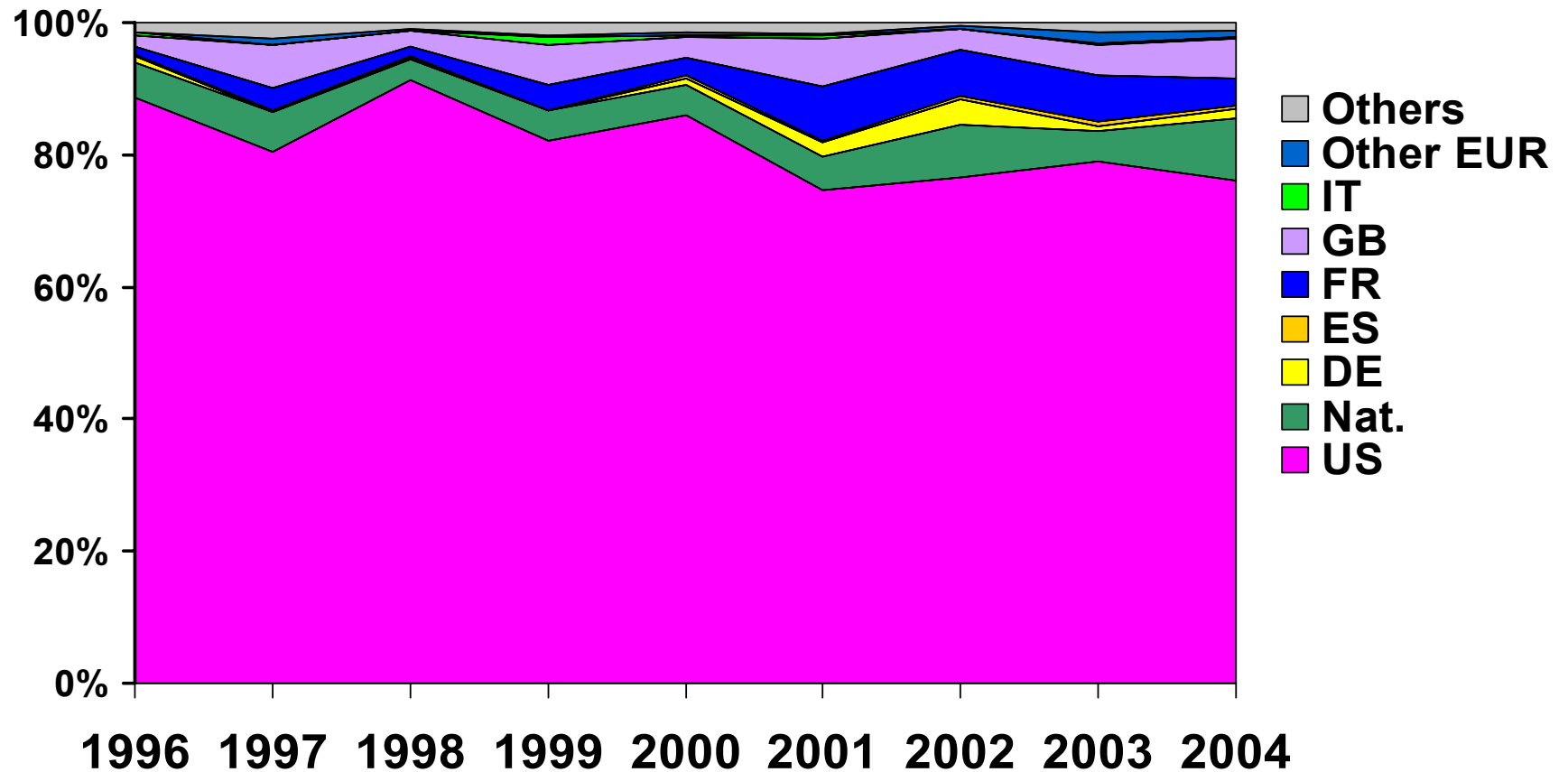
BREAKDOWN OF ADMISSIONS TO CZECH FILMS IN EUR25

(*Kolya* excluded: 1996-2004) – 17,6 million admissions



MARKET SHARE OF ADMISSIONS IN HUNGARY (1996-2004)

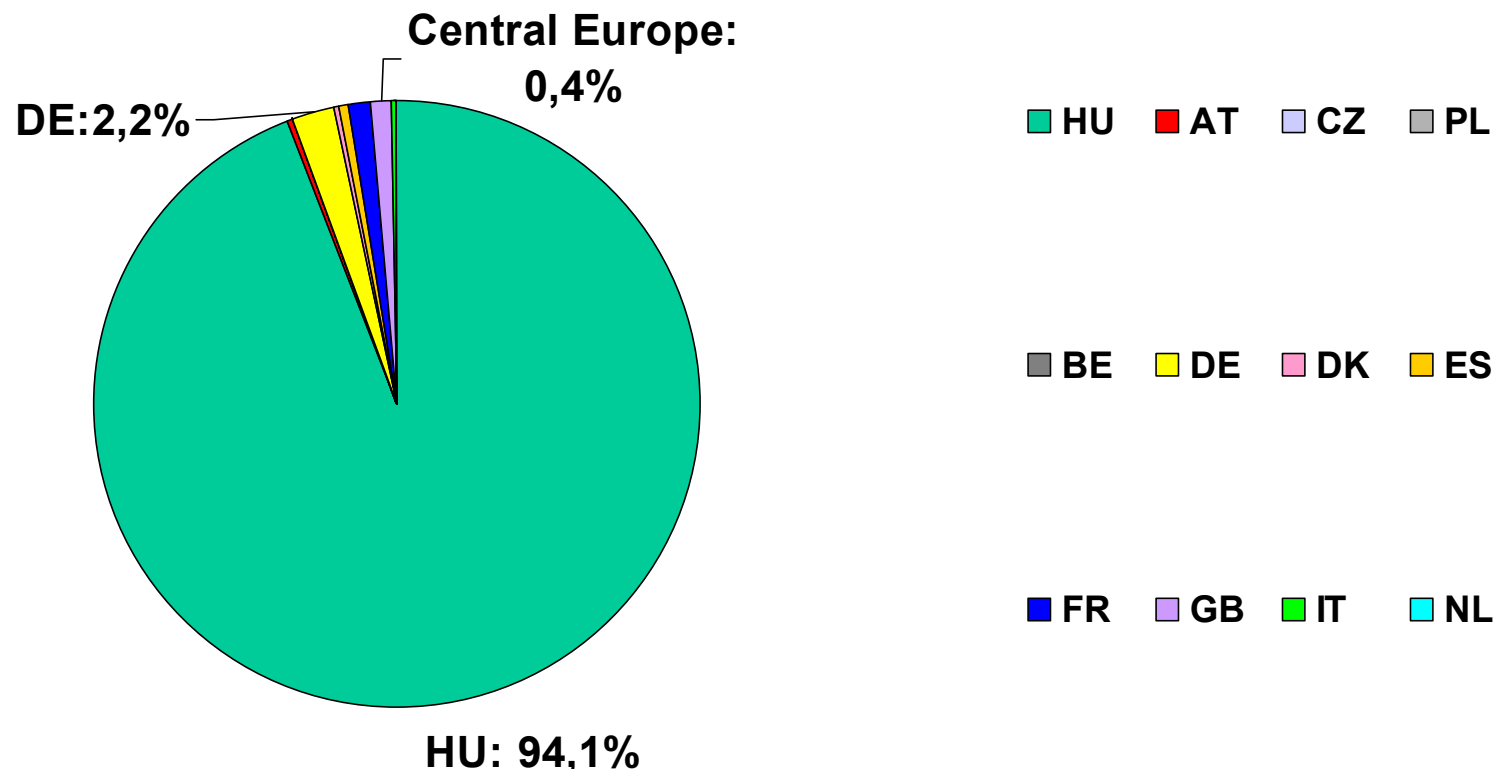
Source: OBS / LUMIERE



CIRCULATION OF HUNGARIAN FILMS IN EUROPE (1996-2004)

- **172 Hungarian films were released in Hungary**
- **16 Hungarian films were released in at least one other European country**
- **7 Hungarian films were released in at least one other Central European country**

BREAKDOWN OF ADMISSIONS FOR HUNGARIAN FILMS IN EUROPE (1996-2004) – 7 million admissions

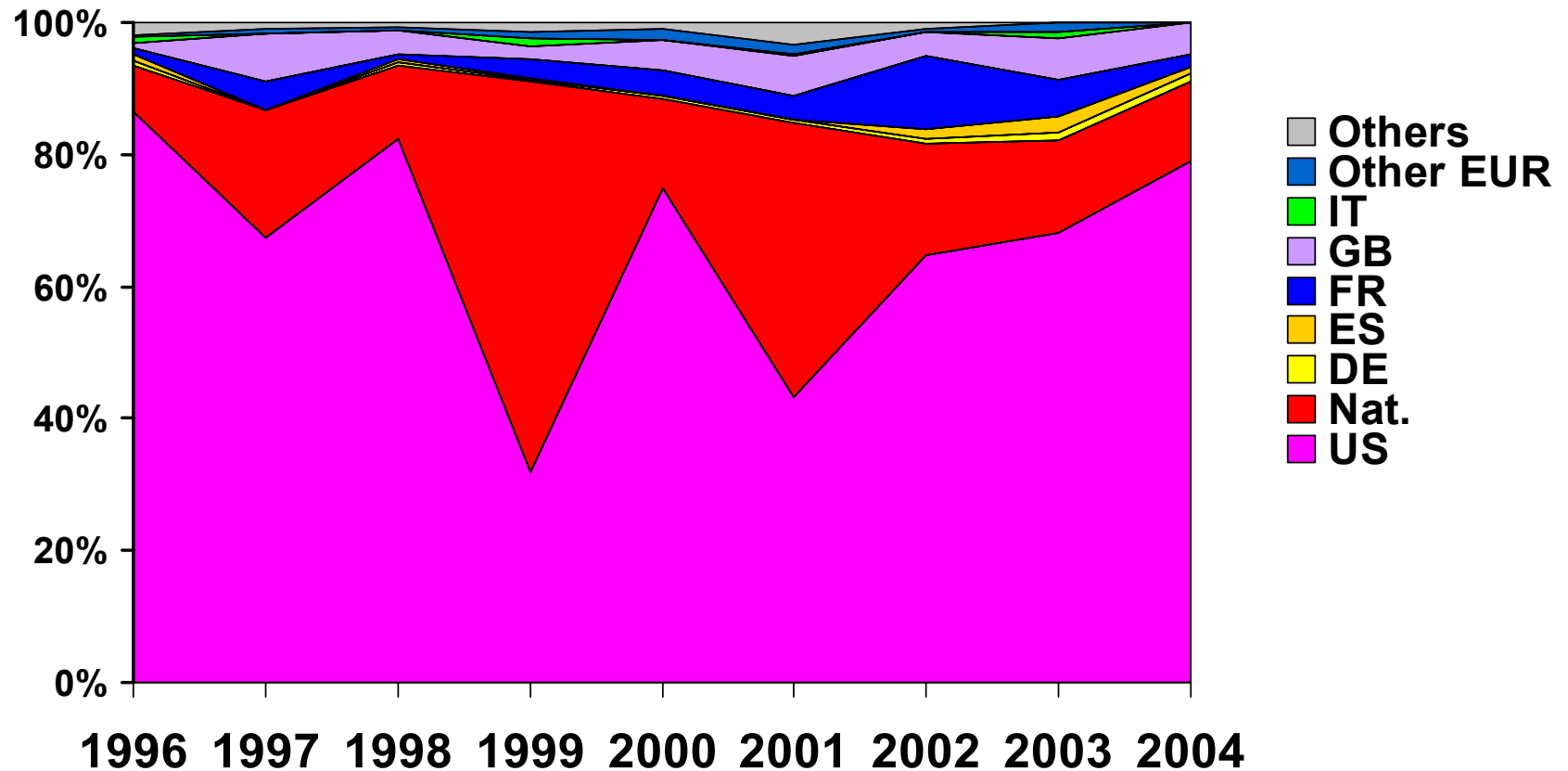


THE 5 MOST SUCESSFUL HUNGARIAN FILMS IN EUROPE (1996-2004)

	Admissions (Hungary excluded)
Sunshine (István Szabó) HU / DE / AT / CA	299 000
Max (Menno Meyjes) HU / GB / CA	43 000
Hukkle (György Pálfi) HU	35 000
Werckmeister Harmonies (Bela Tarr / Ágnes Hranitzky) HU / DE / FR	15 000
A Szerencse lányai (Daughters of Luck) (Márta Mészáros) HU / PL	6 000

MARKET SHARE OF ADMISSIONS IN POLAND (1996-2004)

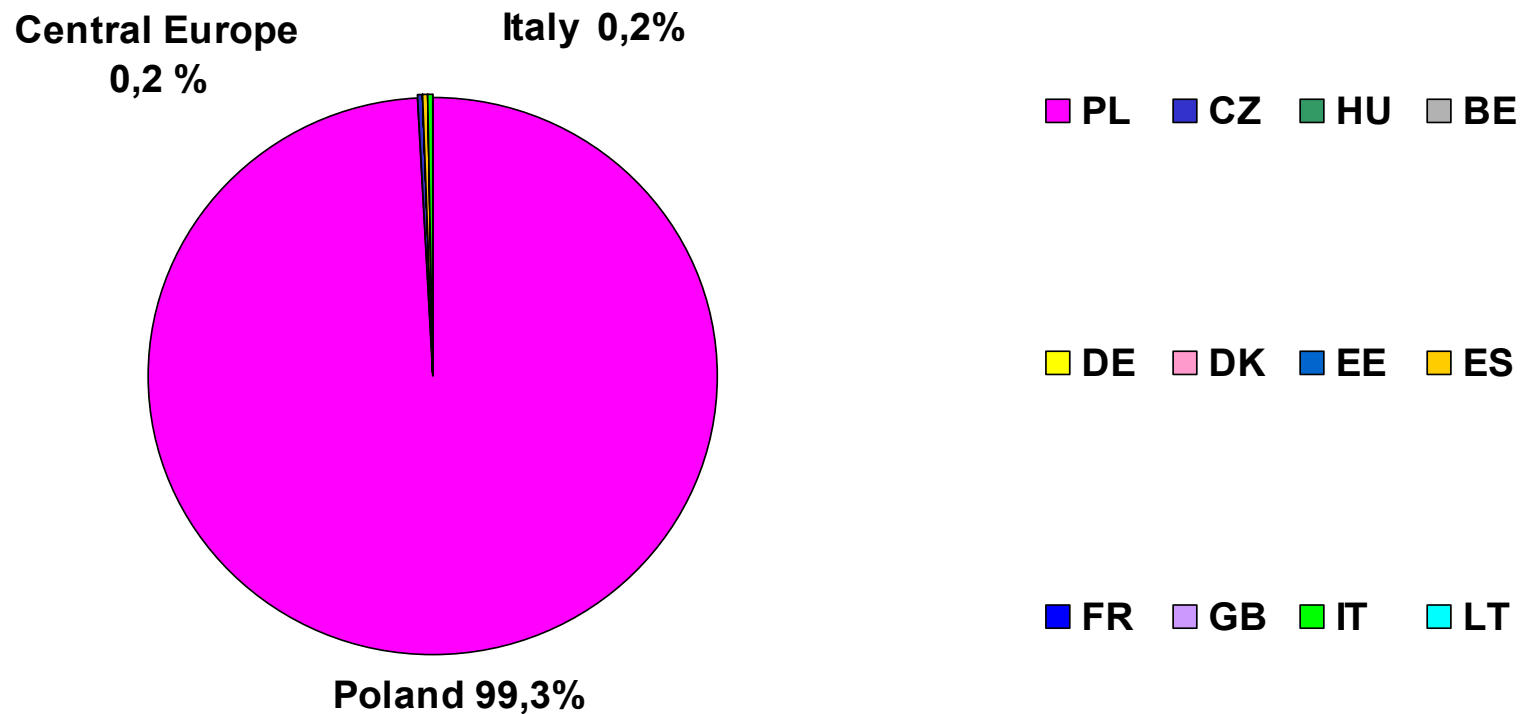
Source: European Audiovisual Observatory / LUMIERE database



CIRCULATION OF POLISH FILMS IN EUROPE (1996-2004)

- **145 Polish films were released in Poland**
- **14 Polish films were released in at least one other European country**
- **9 Polish films were released in at least one other Central European country**

BREAKDOWN OF ADMISSIONS TO POLISH FILMS IN EUROPE (1996-2004) – 44,6 millions admissions



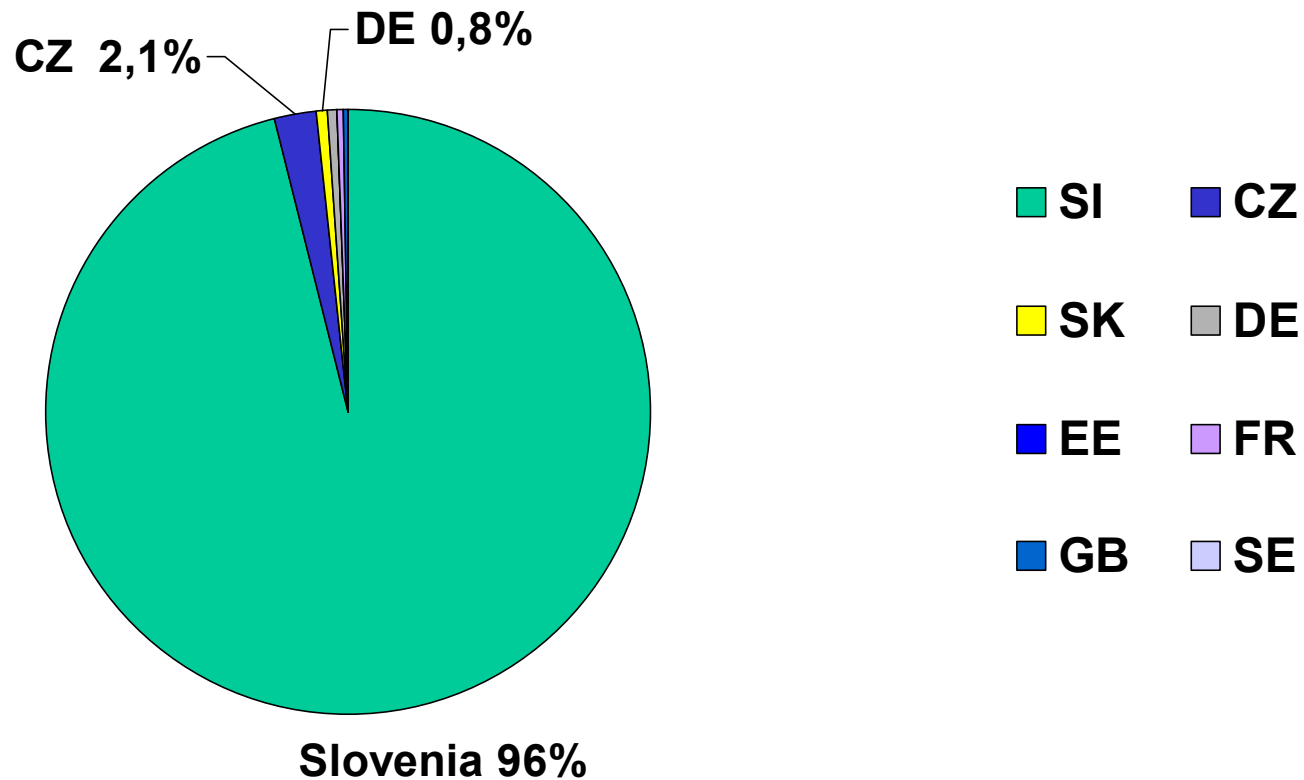
THE 5 MOST SUCCESSFUL POLISH FILMS IN EUROPE (1996-2004)

	Admissions (Poland excluded)
Quo Vadis (Jerzy Kawalerowicz) PL / US	81 000
Historie Milosne (Jerzy Stuhr) PL	79 000
Pan Tadeusz (Andrzej Wajda) PL / FR	63 000
Ogniem i mieczem (Jerzy Hoffman) PL	42 000
Bandyta (Maciej Dejczer) PL / DE / FR	19 000

CIRCULATION OF SLOVENIAN FILMS IN EUROPE (1996-2004)

- **36 Slovenian films were released in Slovenia**
- **6 Slovenian films were released in at least one other European country**
- **4 Slovenian films were released in at least one other Central European country**

BREAKDOWN OF ADMISSIONS TO SLOVENIAN FILMS IN EUROPE (1996-2004) – 0,9 million admissions

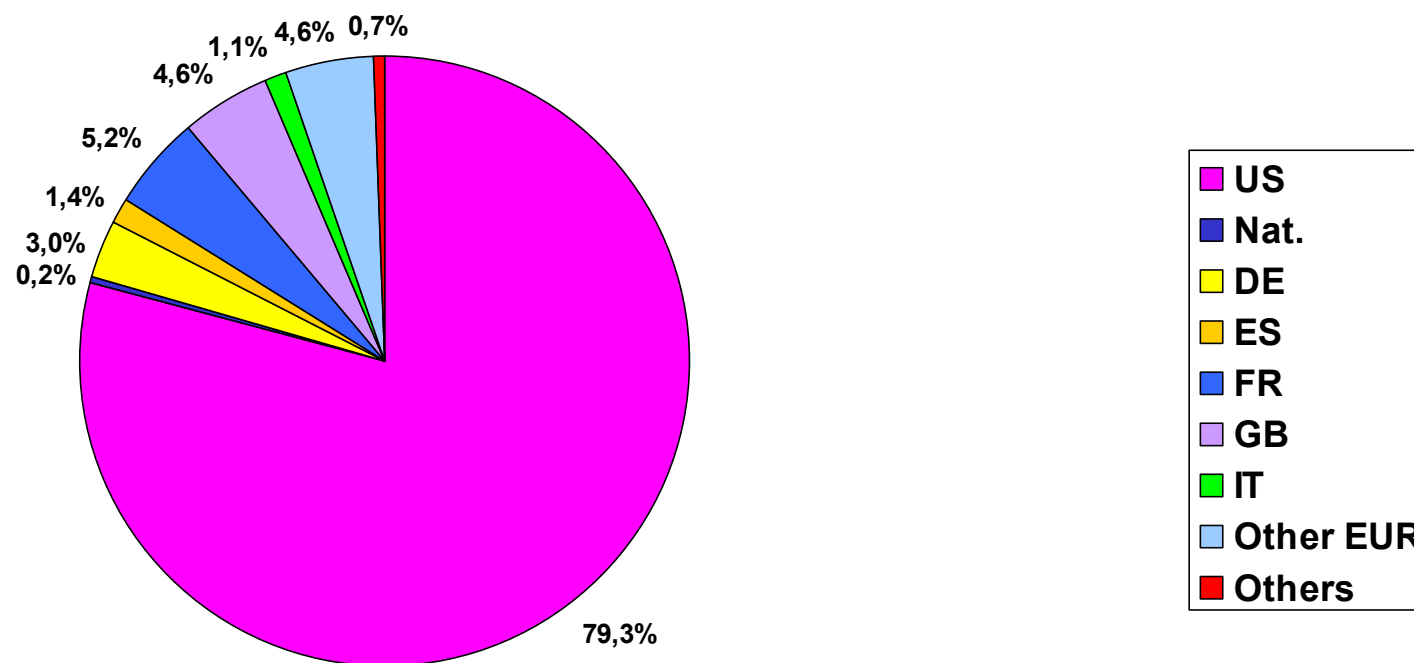


MOST SUCCESSFUL SLOVENIAN FILMS IN EUROPE (1996-2004)

	Admissions (Slovenia excluded)
Kruh in Mleko (Bread and Milk - Jan Cvitkovic)	18 000
Ekspres, Ekspres (Igor Sterk)	7 000
Na svoji vesni (On My Darling Vesna – K. Dvornik & S. Dzukic)	5 000
Reservni deli (Spare Parts - Damjan Kozole)	3 000
Sladke Sanje (Sweet Dreams - Saso Podgorsek)	1 200

MARKET SHARES OF ADMISSIONS IN SLOVAKIA IN 2003

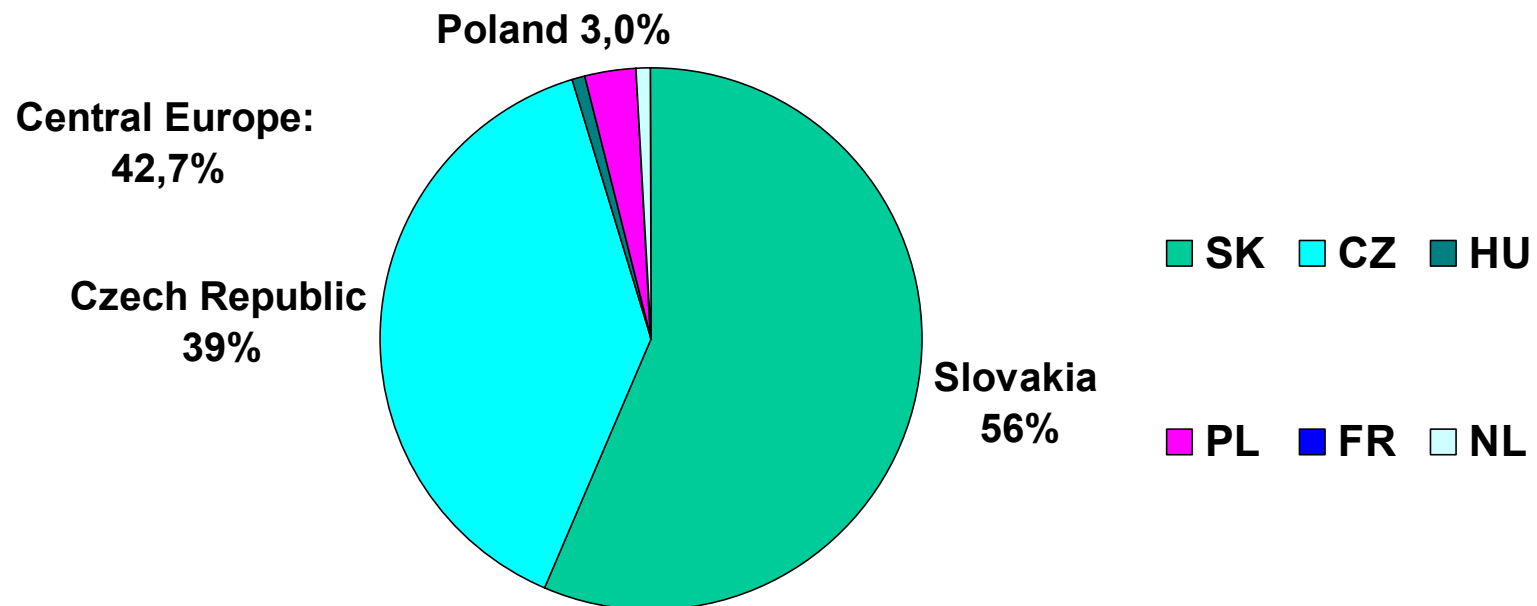
Source : OBS / LUMIERE



CIRCULATION OF SLOVAK FILMS IN EUROPE (1996-2004)

- **Around 18 Slovak films were released in Slovakia**
- **11 Slovak films were released in at least one other European country**
- **11 Slovak films were released in at least one other Central European country**

BREAKDOWN OF ADMISSIONS TO SLOVAK FILMS IN EUROPE (1996-2004) – 0,6 million admissions



MOST SUCCESSFUL SLOVAK FILMS IN EUROPE (1996-2004)

	Admissions (Slovakia excluded)
Sokoliar Tomas (Thomas the Falconer) (Václav Vorlíček - SK / FR / PL / HU)	93 000
Suzanne (Dusan Rapos - SK)	62 000
Fontána pre Zuzanu 3 (Dusan Rapos - SK)	35 000
Kruté radosti (Juraj Nvota - SK / CZ)	26 000
Krajinka (Martin Sulík - SK / CZ)	16 000

The public support to film and audiovisual works – A comparative Study

- **Mapping direct public support policy:**
1,3 billion EUR a year

Institutional and political framework

References to regulatory texts (including recent developments)

Comparative approach of funding schemes

Statistics

A contribution by Olivier Debande (BEI) on the role private investors

DIRECT SUPPORT IS ONLY ONE ASPECT OF AUDIOVISUAL POLICY

- **Financing of public service broadcasting**
- **Regulation of relations between broadcasters and producers**
- **Fiscal incentives**
*(eg. GB 2002-2003 : 468 million EUR,
2003-2004 : 220 million EUR).*
- **Credit with preferential rates (Italy, Spain)**
- **Various support to companies (audiovisual parks, local fiscal exemptions...)**
- **Film commissions, archives...**

NUMBER OF FUNDING BODIES IN EUROPE

Source: OBS

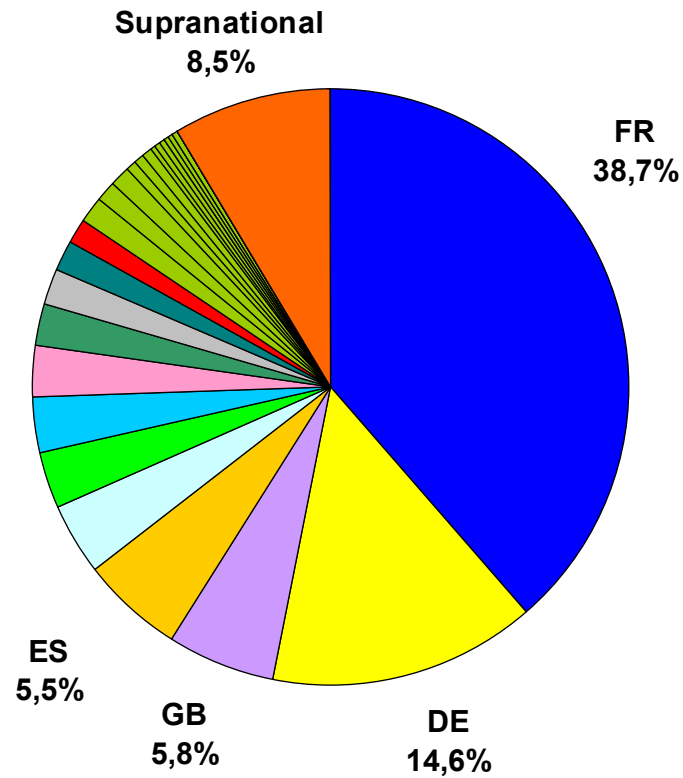
- national	51
- territorial communities	55
- regional	45
- local	18
- supranational	5
- others	8
TOTAL	182

+ FEDERATION OF RUSSIA : ca.80

BREAKDOWN OF FUNDING IN EUROPE IN 2002

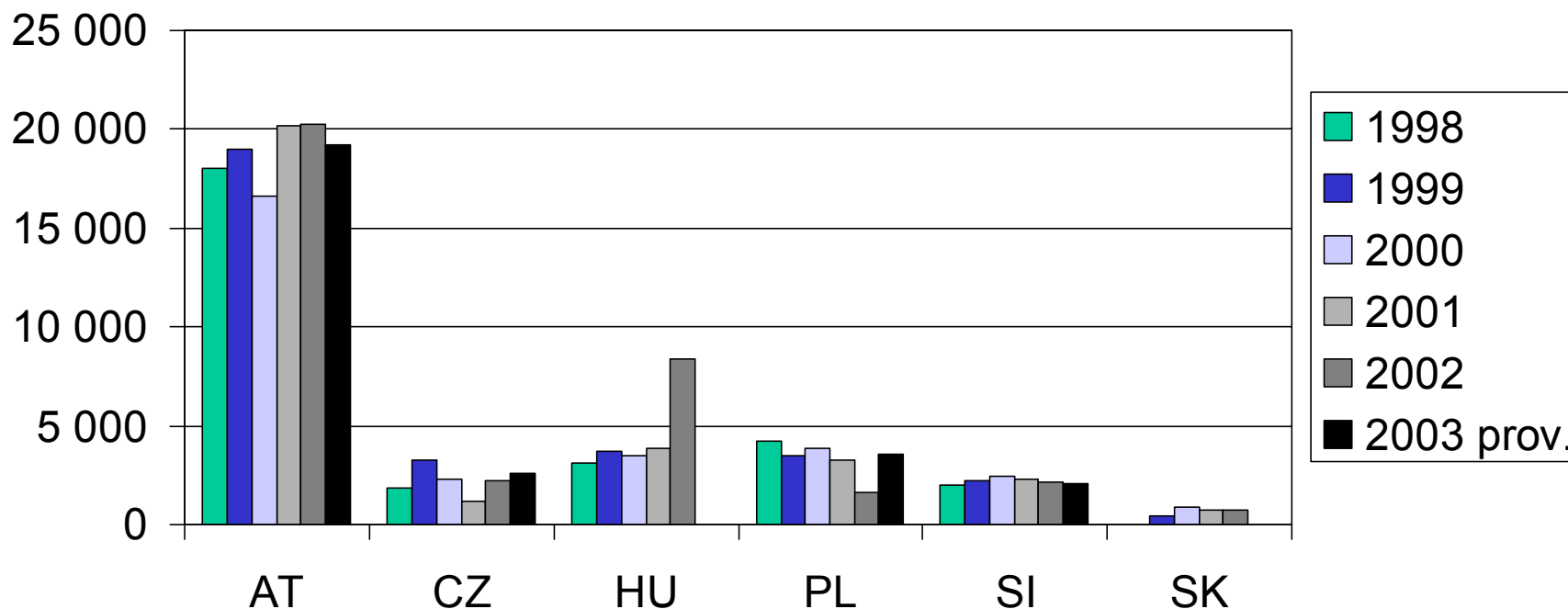
in % of total public funding in Europe

Source: OBS



PUBLIC FUNDS FOR FILM AND AUDIOVISUAL WORKS 1998-2003

Source : OBS / KORDA



THE NEED FOR MORE TRANSPARENCY

- **Transparency of public organisations is generally satisfactory**
- **More information on the financial importance of fiscal exemptions is needed**
- **Monitoring of box-office and admissions to be improved**
- **Transparency of companies income to be improved**

<http://www.obs.coe.int>

***EUROPEAN AUDIOVISUAL
OBSERVATORY***