A Survey on National Cinematography

March 2000

Summary:

This report analyses, by means of a worldwide survey conducted in September 1999, the current situation of national cinematography sectors.

It shows, for different categories of countries, production capacity and potential for participating in international trade.

Special attention is given to opportunities and ways of enhancing cultural diversity and pluralism through the image industry.

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Contents

Introduction

One the main objectives of UNESCO's programme in the field of culture has been the promotion of a specific industry, that is, the organization and economics behind artistic creation, and in particular the national-level production and international-level trade flows upon which cultural diversity depends.

Films and audiovisual goods in general are complex artistic and industrial goods, and they are therefore expensive. They are by far the most important component in the international financial flow of copyright products.

The purpose of this survey was to learn more about two key aspects of today's film world: national production capacities and international trading. It aimed at a better understanding of the capacity to maintain cultural pluralism in an era of globalization. To this end a questionnaire was sent to the 185 UNESCO Member States through their National Commissions in August 1999, followed by a reminder a month later. About 40 national filmmakers' associations were also invited to fill in the questionnaire. **This report presents a summary of the responses that were received, followed by suggestions to define ways to preserve audiovisual diversity. Annexes with tables and graphs, and a reprint of the questionnaire itself, complete the report.**

Centralized documentation in the field of film-making exists for only 77 of the countries consulted; **nearly 50% of these, or 39 countries, responded.** This data may be found on pages 9 and 10. Supplementary data was therefore needed from other UNESCO and United Nations sources. This quantitative information was then compared with several economic and social indicators in order to establish a grid that would provide a tentative typology concerning national production.

Any comments or additional data from readers will be most welcome.

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Questions and Answers

1. International issues

The first question concerned the legal basis for cinema activities in each country, including adhesion to international treaties concerning copyright protection and trade of cultural goods. Specifically:

> *Has your country ratified international or regional agreements concerning copyright protection and free circulation of cultural goods? For instance:*
> *– The Florence Agreement on the Importation of Educational, Scientific and Cultural Materials (1950; circulation of cultural goods)*
> *– Universal Copyright Convention (Geneva, 1952), revised in Paris, 1971*
> *– International Convention for the Protection of Performers, Producers of Phonograms and Broadcasting Organizations (Rome, 1961)*
> *– Convention for the Protection of Producers of Phonograms against Unauthorized Duplication of their Phonograms (Geneva, 1971)*
> *– The Bern Convention for the Protection of Literary and Artistic Works (1979)*
> *– The Nairobi Protocol (1976) to the Florence Agreement*

Most Western and African countries answered positively to these questions which are cohesive with the official listings of signatory parties, especially in the case of the Florence Agreement – which facilitates the importation of cultural goods to which ninety-four countries are parties. However, Asian countries show a low participation to these conventions and agreements.

The correspondents also mention regional treaties, including trade aspects of cultural goods and services, e.g. NAFTA/ALENA for Northern American countries and MERCOSUR in the Southern American continent. The former Soviet Union satellite countries still mention the treaties signed in the context of the COMECON Community, and several correspondents in Western Europe mention European Union (compulsive) directives.

The following countries have adhered to all the above-mentioned treaties: Bahrain, Canada, Czech Republic, France, Kenya and Luxembourg.

The questionnaire mentioned only the traditional treaties. However, in 1996 the World Intellectual Property Organization (WIPO) proposed two new texts, the Treaty on the Interpretation and Execution of Phonograms and the Treaty on Copyright. These are known as the Internet Treaties, and in the process of being ratified. In addition, the Millennium Round trade negotiations led by the World Trade Organization (WTO, former GATT), after a difficult start, will include negotiations on the exchange of cultural goods in the years to come. At stake are concepts like the very existence of a national cinematography and fair protection for authors in harmony with free public access for which governments are committed to assume responsibility.

2. National issues

The next questions concerned national legislation and organization:

– *Does a specific national legislation exist aimed at the protection of copyright applicable to the works of authors of cinematography and audiovisual goods?*
– *Is there a specific law for the protection of certain sections of the public (e.g. a law protecting young persons)?*
– *Is there a national law against piracy?*
– *Is there a national cinematography (regulating) centre?*
– *Is there a national or government agency for official registration of films or audiovisual materials (e.g. registration of copyrights)?*
– *Is there a national body for the conservation of films and audiovisual materials?*

Only about 60 of a total of 102 countries producing films have a legal framework and/or official structures regarding this sector. The lowest number of positive answers concerns national copyright protection and the physical conservation of audiovisual and cinematographic goods.

The survey showed that authors' rights are least protected in Asia. The Motion Picture Association of America (MPAA), representing the eight US 'majors', loses US$ 2.5 billion yearly in potential copyright revenues due to film piracy, mainly in Asian countries, Mexico and the Russian Federation.
Source: 'Intellectual Property Rights: The Film Industry Perspective', MPAA presentation for the House of Representatives Committee on International Relations, Washington, May 1998

When the number of specific laws and decrees passed in each country are added up, the following list of countries with the most legislation is obtained

Africa	Arab countries	Asia/Pacific	Europe	North America	Latin America
Benin	Bahrain	Malaysia	Austria	Canada	Argentina
Mali			Belgium	United States	Brazil
Kenya			Czech Rep.		Ecuador
			Denmark		
			France		
			Hungary		
			Italy		
			Portugal		
			Sweden		
			Switzerland		

3. Financing: state vs. commercial

The role of film financing was addressed by a specific set of questions.

- *Does the government contribute to financing film productions?*
- *Please indicate the average percentage ceiling of such governmental financial participation.*
- *Is this participation regarded as a direct government grant?*
- *Are the funds managed by professionals themselves?*
- *Are they considered advances on ticketing revenues?*
- *Do they feed a special production fund?*
- *Are there direct grants for film distribution (e.g. to finance copying or advertising campaigns)?*
- *Is there a tax-reduction scheme to encourage film investors?*
- *Are there other regular financing sources for film production?*
- *Is the private sector funding films?*
- *Are there particular grants for young filmmakers?*
- *Are there individual grants for script writing?*
- *Is there tax exemption for production companies, labs or studios?*
- *Does any film-funding come from abroad? Specify the sources.*
- *What is the average percentage of foreign financing in an international film co-production?*
- *Are public or private television companies compelled to contribute in film financing?*
- *Is this contribution a mandatory fixed share /quota to support the film industry?*
- *Is it an advance on broadcasting rights?*
- *Is it a kind of financial guarantee?*
- *What is the average percentage the financial contribution of broadcasting to film production?*
- *If the government (through ministerial departments, official agencies, but excluding public broadcasters) finances film production or audiovisual materials, please give an estimate of the number of productions receiving grants and the average share for each production in US$ per year.*
- *The same question as above, but specifically concerning public (institutional/governmental) information film and audiovisual productions.*

There is a clear dichotomy between the industrialized world and the developing countries concerning film financing. The largest-producing nations like India, the United States America and Hong-Kong SAR, which are at the same time the largest exporters, are also those receiving the least amount of state funding. The percentage of public funding varies widely from one country to another.

Countries with highest amount of state funding

Country	Percentage of state funding	Total industry turnover in millions of US.$	Films produced in 1998
Austria	90%	100	22
Azerbaijan	90%	0.5	3
Luxembourg	88%	41.2	1
Spain	80%	23	45
Portugal	80%	60	14
As a reference:			
France	23%*	798.3	183

*The sum of state funding and contribution from public/private broadcasters

These figures are in sharp contrast with the 5% ceiling proposed by the WTO. The most extensive mechanism for government financing recorded by the questionnaire is the so-called 'taxation on ticketing' which is probably also the oldest film financing source. Only in Europe and North America is there a system by which young filmmakers are financially supported for the realization of their first work, as well as specific funds reserved to scriptwriters.

The financial contribution of broadcasters in film financing has been decisive in maintaining and encouraging levels of national film production throughout the 1990s. That is particularly the case for medium-producing countries (from 20 to 199 productions per year), the category which includes Europe. In most of these countries, financing by broadcasters is compulsory, ranging from 15.7% in France to 75% in Italy. The participation of Mexican and Argentine broadcasters in national film production is 10%.

4. Professional issues

The following questions attempted to quantify the size of the national cinematography sectors and their organizational degree.

> *– Do film-makers, directors and/or technicians benefit from a national legal status?*
> *– Do national professional associations exist for filmmakers and other cinema-related professions?*
> *– How many professionals are involved in the audiovisual sector?*
> *– Please indicate the approximate number of companies offering services to the cinema and audiovisual sector in your country. Please also give the approximate number of employees for each group.*

It seemed difficult to understand the concept of a 'legal status for filmmakers'. In fact this professional condition might depend more on the adhesion to self-regulating bodies like unions and professional organizations than to any legally defined category. Professional associations in the United States number more than one hundred, while in European countries there are from four to fifteen, and from one to three in Africa, Latin America or Asia. Only in very few small-producing countries in the Southern Hemisphere are professionals not yet well organized.

Only a few correspondents answered the question on the number of film-producing companies, which makes any conclusion hazardous. However, for those countries where data is available it appears that specialized television and video studios are much more numerous than cinematography companies and specialized film services. Consequently the ratio between professionals operating in the audiovisual sector – mainly television – and those specializing in cinematography is seven to three, and does not vary much in the different continents or between categories of large- or small-producing countries. The number of professionals involved in film production and distribution varies from 0.6% (34,000 professionals) of the total population in France, to 0.1% (10,000 professionals) in a medium-producing country like Portugal and 0.2% (198 professionals) in a small-producing country like Mali. In the United States, by comparison, 3.5 million people are employed in what is called there the 'core copyright business'.

5. Countries ranked by production volume

The most significant indicator in this survey was the number of films produced nationally in one year.

> – *Please indicate the total annual number of productions made in your country, mentioning the year referred to.*
> – *Please indicate the total turnover in US$ for all productions made in your country.*
> – *What countries do the foreign participants, producers or investors represent?*

Three distinct groups of categories of countries appeared, depending on the importance of national production potential. These groups showed coherence with other social and cultural indicators. They might be clustered further according to common production characteristics and geographical origins. In the following table, the countries are divided into three major groups (large, medium and small); they are ranked in decreasing order of total number of films produced.

An asterisk after the number of films indicates that data was obtained directly from the questionnaire. The numbers are yearly averages in the decade from1988-99.

I. Large-producing countries: more than 200 films per year (5 countries)

India	839
China + Hong Kong SAR	469
Philippines	456
USA	385
Japan	238

II. Medium-producing countries: from 20 to 199 films per year (25 countries)

Thailand	194*	Sri Lanka	58
France	183*	Argentina	47*
Italy	99*	Russian Fed	46*
Brazil	86*	Spain	45*
Myanmar	85*	PDR of Korea	37
United Kingdom	78	Sweden	30*
Bangladesh	77	Greece	25
Egypt	72	Singapore	25
Pakistan	64	Canada	24*
Germany	63	Austria	22*
Rep. of Korea	63	Nigeria	20
Turkey	63	Poland	20*
Islamic Rep. of Iran	62		

III. Small-producing countries: from 1 to 19 films per year (72 countries)

Australia	18	Ukraine	6	Côte d'Ivoire	2
Ireland	17	Burkina Faso	5	Latvia	2*
Netherlands	16	Georgia	5	Libyan Arab	
Viet Nam	16	Lebanon	5	Jamahiriya	2
Denmark	15*	Bolivia	4	Former Yug. Rep. of	
Czech Rep.	14*	Ecuador	4*	Macedonia	2
Indonesia	14	Guyana	4	Sierra Leone	2
Israel	14	Morocco	4	Slovenia	2
Portugal	14*	Namibia	4	Syrian Arab Rep.	2
Switzerland	13*	New Zealand	4	Tunisia	2
Hungary	12*	Slovakia	4	Angola	1
Malaysia	12*	Venezuela	4	Chile	1
Norway	12*	Afghanistan	3*	Cyprus	1
Albania	11	Armenia	3	Ethiopia	1
Bulgaria	11	Azerbaijan	3	Ghana	1
Kazakstan	10*	Colombia	3	Guinea	1
Mexico	10*	Croatia	3	Iraq	1
Uzbekistan	10	Estonia	3	Luxembourg	1*
Romania	9	Guatemala	3	Mauritius	1
Finland	8	Lithuania	3	Peru	1
Yugoslavia FR	8	Mali	3*	Sudan	1
Belgium	7*	Algeria	2	Tajikistan	1
Iceland	7	Belarus	2	United Republic of	
Cuba	6	Cameroon	2	Tanzania	1*
Rep. of Moldova	6	Costa Rica	2	Uruguay	1

Nine non-producing countries also responded to the questionnaire: Bahamas, Bahrain, Benin, Cambodia, Chad, Kenya, Namibia, Nicaragua and Rwanda.

6. Film Markets

The size of the national film market is defined through the following questions.

- *Please indicate the number of feature films, videos or digital productions annually imported to be shown in film theatres, distributed through 'video-shops' or broadcast by (public or private) television channels.*
- *How many national or foreign film distributors operate in your country?*
- *What is the number of film theatres, national (public or private) television broadcasters, (earth stations as opposed to satellite programmes) which operate in your country?*
- *Please indicate the total film theatre (seating) capacity?*
- *Please indicate the total number of entries (ticket sales) in theatres (both cinema and video) for the entire country Please also specify the total income from entrance tickets as well as the average price for one ticket*
- *Is it possible to mention a global trend for film theatre audiences?*

The domestic market size determines the local production capacity. There is also a direct relationship between the film export volume and the home market. In large- and medium-producing countries these national markets depend primarily on the number of inhabitants and their urban concentration. In developing countries with very small production these markets are directly related to the number of imported films.

Indicators such as the number of cinema theatres, screens, seating capacity, yearly attendance and global theatre revenues are not only coherent among themselves, they also relate to a set of socio-cultural and economic indicators such as the United Nations Human Development Indicator (HDI), gross national product (GNP), the number of published books or (primary) school attendance and illiteracy percentage. This is particularly evident in the small-producing countries.

In the medium-producing countries, the revenue from cinema attendance is US$ 600 million for an audience segment of 100 million, and in small- producing countries, US$ 2.3 million for each segment of 1 million.

A discrepancy appears between the correspondents' perceptions of the trend for cinema attendance and the data regularly gathered by specialized agencies. This is probably due to differences in analysing yearly fluctuations or larger time sequences. Observing differences between audience attendance at national or international films could be more pertinent.

7. Types of media technologies

The role of new technologies in creating new distribution channels and increasing audiences' sizes was sought through the following set of questions.

> *– How many television channels operate from your national territory? How many channels are government-owned? How many are private? How many channels have a national audience? How many are local?*
> *– What kind of national programmes are broadcast by these (public or private) stations?*
> *– How many hours are broadcasted annually and what percentage of the total programming do the productions represent?*
> *– Are the foreign feature films broadcasted on television, shown in theatres or distributed on cassette mainly translated (dubbed) or subtitled?*
> *– Please specify the approximate number of household video recorders (VCRs) in your country*
> *– Give the number of households connected to parabolic (television) antennas*
> *– Give an estimate of the number of households connected to the (earth-) cable television?*

Few correspondents answered the above set of questions. Since television and cinematography in the majority of countries depend on various government agencies or ministries, it appeared difficult to answer above questions authoritatively. Very few questionnaires offered information on both sectors.

Taking into account the convergence between cinematography and audiovisual technologies (television, video, digitally-processed images) and its repercussions on lowering production costs and expanding audiences, further study will be needed on the role of television and video as cinematographic media.

For the US, 60% of film revenues come from foreign markets.

Curiously the choice on whether imported films will be dubbed or subtitled does not seem to depend on any social, linguistic, geographical or cultural indicator. Since this indicator might be of importance in analysing film distribution constraints, any suggestions from readers will be welcome here.

8. Film festivals

This group of questions aimed to investigate the role played by film festivals.

– Indicate the names and specializations of the main national or local film festivals.
– How many national feature films have been presented at foreign film festivals during the last five years?
– Which foreign film festivals have presented films from your country?

It appears that almost every country – even those without national film production – organizes one or more film festivals. With nearly a thousand film festivals worldwide, there is evidence that the phenomenon has evolved in a very short time from a purely professional marketplace to a popular cultural event with large media coverage and public impact. As regards the third question, the responses mentioned repeatedly the three largest and best-known festivals: Cannes, followed by Berlin and Venice. Other festivals are Montreal, San Sebastian, La Habana, Carthage and Ouagadougou (FESPACO).

9. Training

Training plays a decisive role in promoting national cinematography.

– Is an introduction to cinema included in the official school curricula?
– In your country are there, specialized, secondary/technical or tertiary level, centres for cinema, television or audiovisual arts training/education?
– Please indicate the total annual number of students (of cinema or audiovisual arts) in your country?
– Are any students from your country studying cinema or audiovisual production abroad?

In these responses, there was no distinction between industrialized or developing countries, or between large- or small-producing countries: it appears that only very few school systems have introduced courses on cinema into their curricula, despite the fast-growing impact of audiovisual materials not only in educational processes, but also on the audiences.

Worldwide there are more than one hundred specialized tertiary film-training schools, not counting specialized university centres and journalism schools, with some eighty schools concentrated in North America and twenty five in Europe; Asia has thirteen, Africa (including North Africa), seven and Latin America, five. Few correspondents were able to answer the question concerning their fellow-countrymen attending specialized education at home or abroad.

It is a fact that creating and supporting film schools is beyond the financial possibilities, or even priorities, of some of the countries in the Southern Hemisphere. Various attempts at regional co-operation in Africa between governments failed during the 1980 recession. Therefore African film-makers, instead of building expensive schools offering complete curricula, rather prefer to hold regional workshops periodically, where specific subjects are taught, such as camera work, lighting or film- and sound- editing. Further apprenticeship to keep in touch with quickly evolving techniques should take place in the well-known Western schools.
Source: 'African Cinema, a New Start'. Report to the European Commission, DG VIII, October 1995.

Conclusions

For the purpose of this study, terms such as ‘film’, ‘feature’ and ‘motion-picture’ are used synonymously for a film production lasting from 90 to above 120 minutes (1,000 to around 3,000 meters long) shot in both 35 mm and 16 mm formats. In measuring the main data on films released over the last decade, an attempt was made to use a more stable indicator and thus avoid the fluctuations occurring from year to year. Therefore these averages may not always reflect recent national comebacks or decreases in film releases, as is the case for Senegal or Mexico.

1. Production. A first comparison with data from the 1980s shows a worldwide decreasing trend in film releases, although cinema attendance and television audiences have been increasing continuously since then. In addition to economical trends, other determining factors can be identified in the evolution of this sector. For instance, the new roles played by broadcasting companies as combined co-financiers, producers and distributors have been decisive to the film industry. Technological developments in digital and video imagery have also changed the entire organization, and even the composition, of the professional community. Whereas previously there were 60 professions involved in the film production process, there will be more than 100 different specialists participating in multimedia productions in the near future.

Three categories of countries emerged, according to their average yearly national film output, each of which may be further divided into three clusters:

First cluster:

1. Australia, Canada, United Kingdom and United States together produce 500 films and form a homogeneous and structured English-language market. This is traditionally the category that receives the least amount of state funding in relation to the volume of production.
2. The second group includes all of continental Western Europe with 450 films in a variety of languages and different cultures. This is the category receiving the largest amount of state funds.
3. Four distinct Asian countries are the largest world producers: India (839), Philippines (456), Hong-Kong SAR (349) and Japan (238).

Second cluster:

There exists a second, intermediate category of 25 medium- producing countries with an average of from 20 to 199 releases. They have in common a dramatic fluctuation between the number of their annual releases. This may imply an unstable technical industry, as illustrated by Egypt or Mexico where the figures have varied widely over the last decade. They may be grouped geographically as follows:

1. Asia: Thailand (194), China excluding Hong-Kong SAR (120), Pakistan (64) and the Republic of Korea (63). The main social correlation between these countries is their high population density.

2. Latin America: Brazil (86), Argentina (47) and Mexico (20 on average, though 10 in 1998).
3. Eastern Europe, the Arab and Scandinavian States where several countries have an average production of from 10 to 20 yearly releases.

Third cluster:

The last category includes some fifty sporadically producing countries – i.e. with very small production –equally distributed throughout the five continents. This cluster coincides with countries with the highest or lowest population rates and lowest and highest GNP. This dichotomy appears more clearly between, on the one hand, the poor and highly populated nations, and, on the other, the richest countries with a small number of inhabitants. Most often, they never have had a structured cinematography sector at all. This situation does not exclude a legitimate interest by the authorities to launch, to reorganize or to maintain a national audiovisual sector.

2. Foreign film trade. Identically, heading the list of largest feature film imports are the United States and Europe. In 1997, whereas 53 million North Americans saw European films in cinema theatres, 388 million Europeans saw 480 Hollywood films. The balance of film imports and exports between both regions is favourable to the United States by fully one third, representing a net yearly income of US$ 5.6 billion. Canada follows with 220 foreign films screened, although it produces only 24 titles yearly. The ranking of main film-exporting countries is almost identical to the hierarchy of film producing-countries, including Asian nations. India leads with an export output of around 60% to the eastern African markets, with a peak of 62% for Tanzania.

Proportionally, African countries are the largest importers of productions from the United States of America as compared with other foreign film sources. Divided mainly into two large distinct linguistic sub-regions, the anglophone African countries annually receive about 70% of American films as opposed to 15% French and European productions. Inversely, French-speaking African countries import the same proportion of European and American productions (40%). An exception is Morocco, with an average of 46% of films imported from Hollywood, compared with 20% from India and only 8.5% from France. It appears that while some Northern industrialized countries are - through their international cooperation programmes - investing in developing weak economies, other donor countries are more concerned with exporting cultural products and values.

In Latin America the imbalance seems greater since European productions do not exceed 10%, for example in Chile or in Costa Rica where Hollywood films represent 95% of the domestic market. The European and Asian markets preceded this trend in the 1960s. On both markets the average number of imported American films is still increasing, varying nowadays from 50% in Sweden to 97% in Cyprus. An exception is the Islamic Republic of Iran, where United States productions represent only 7% of the import market. Iran produces 62 feature films per year, and is by and large the most balanced importer, buying foreign films from a balanced variety of cultural and linguistic sources.

In the range of medium-producing countries, the China Hong-Kong SAR studios (excluding China) and Taiwan account for large sales outside the Asian continent, especially in Africa and South America. The same applies to Japanese productions, which are increasingly being shown in Europe (23) and in the Americas (96). Others, like the Russian Federation, France, Germany and Italy are establishing their positions in Asia and Africa. The United Kingdom is probably the country with the higher number of foreign sales for their domestically produced films.

However, these figures do not represent other extraneous phenomena with large effects on the international trade of moving images, such as national protection quotas, government censorship, large government aid plans to encourage domestic productions and far-reaching dumping practices in emerging markets.

3. Maintaining cinematographic diversity. There would appear to be two main conditions for the preserving an equitable degree of image diversity and thus a pluralistic cultural supply: first, and as a pre-condition, the ability of governments to co-finance local production of images and to stimulate quality and quantity. The second main condition is the capacity to exchange these local productions on national markets.

The survey data reveal three main categories of countries, based on production capacity over the past few years. They show that the overall indicators are consistently related to this one central indicator. Large- and medium-producing countries are major exporters and importers as well. Their trade is also proportional to the volume of their own national markets, but it is less significantly related to the size of their economic situation.

A more important correlation appears between the legal and organizational degrees of the cinematographic sectors (indicator = 0.88) than between the number of public grants available to producers, directors and distributors (indicator = 0.61).

It would seem that below a certain level of social and economic status there is no cinema production. With a GNP of less than US$ 1,200 and/or a United Nations Human Development Indicator (HDI) of 0.600, some 88 countries of a total of 185 have never had their own film production. Does this mean that 465 million people in the world will not able to see their own image reflected?

Nevertheless, the rapidly evolving methods of production (video and digitally processed images) are already considerably lowering technical production costs, thus enabling non-producing countries to develop an autonomous audiovisual sector tailored to their own cultural policies and market capacities. Nowadays it is easy to transpose images from one storage medium to another during the production or distribution processes. This is the case in Africa and Asia, where several governments have encouraged cinema owners to adapt their theatres by installing video screens.

To build and maintain national production capacity, state financial support and legislative protection for authors, as well as professional training programmes, are prerequisites. The establishment of such a broad structure demands close co-operation between the state and the professional community. Government regional co-operation with regard to training centres and technical industries seems in most cases inevitable, even in medium-producing nations with a fluctuating production output.

As for those few countries with the largest production capacity, which rely mainly on market forces, the choice of directors and even film topics depends greatly on the expected return on investments. Financially supporting young authors and directors, scriptwriters and independent producers will increase the number of quality films. As the impact of governmental financial interventions in cinema industries might be carefully targeted, a variety of tailored (and temporary) financial incentives could produce quick results without disrupting these fragile markets.

Today government funding exists in fewer than 80 out of the 102 producing countries. This means that those countries with regulatory agencies have developed specific, basic legislation and funding mechanisms for cinema, without which no national film industry can develop.

Therefore, where the political will and regional or national economic conditions exist, the establishment of a governmental cinema policy might be considered as necessary to counter an excess of imported images which would erode the social texture and the sovereignty and cultural identity of a country.

In the final analysis, the capacity of governments to promote cultural industries is rather difficult to grasp through statistics alone. The correlation between the population attending primary school and the number of domestically-produced feature films is rather low (correlation indicator = 0.10). The relation becomes more consistent between the number of released films and that of published books (correlation = 0.46). Nevertheless, some African countries release the same number of films as books, and this, at least, indicates a firm political commitment towards a national audiovisual sector. One reason might be that the funding of film projects in African countries often originates in Western government or private co-operation funds.

As for national markets, the factor best indicating their potential is represented by the volume of national audiences and the number of cinemas (film theatres). These figures are directly linked to the size of the population and, even more, to its urban concentration. The correlation varies between 0.73 and 0.78. However, when we consider national markets in medium-producing countries these figures would seem to be more directly connected with the number of imported films rather than those domestically produced.

An additional remark on film trade is that beyond trade statistics, further study is needed on the attraction of the 'star system', advertising and associated merchandising for international productions. In Hollywood these supporting activities amount to 50% of a film's budget.

Another area remains to be explored: state funding for the audiovisual and cinematographic sectors aims to increase the number of national films, but in order to maintain diversity, the question is not just to stimulate supply; the demand of the consumers for education needs to be taken into consideration as well. It has now become urgent to educate school children through school curricula and to sensitize the public at large through various forms of media. Learning to 'read' images might well be the way to increase interest in quality audiovisual productions.

With an average as low as 42 local productions, Africa imports over 2,811 films per year. Cinemas in Arab countries show ten times more foreign than domestically produced films. However, Asia imports only slightly more than one third of the total moving pictures shown in their cinemas. Europe remains the largest importer with 6,000 titles, and produces less than 500 films.

85% of the films shown around the world originate in Hollywood. Copyrights on cultural goods and services generate from US$ 30 to $40 billion yearly. Nevertheless, the excessive difference in film flow worldwide is somewhat compensated by more balanced regional exchanges. Some studies call these 'cross-border markets'. It appears that several countries in the medium-producing category benefit from a traditional peripheral market defined by a geographical vicinity or common cultural and linguistic identity.

This geographical pattern is recognizable within Asia, where exporting countries such as India, Japan and Hong-Kong SAR may occupy more than one third of neighbouring markets. For instance, Indian films account for 35% of the feature films screened in Bangladesh, and Hong-Kong SAR produces 38% of the films shown in Pakistan. Thanks to strong 'community' incentives, European films occupy 20% of most European Union national markets, with the exception of the United Kingdom, which imports a smaller percentage of continental European language films (3%).

As for linguistic homogeneity, the outstanding example is still the English-speaking market, amounting to almost 600 million individuals and accounting for 11.5 % of world's population. This is followed by Hindustani speakers (8%) and French speaking-people, accounting for 2.5% of the world population.

Despite their potential, several major world languages are not equally reflected in the film trade statistics. This holds for Russian, Chinese, Arabic, Portuguese or Spanish, spoken by nearly 40% of the entire world population.

In 1994, at the conclusion of the so-called Uruguay Round and the signature of the Marrakech Agreement, the World Trade Organization (WTO) succeeded the General Agreement on Tariffs and Trade (GATT), which was created in 1947. What has been called the 'cultural exception' (*l'exception culturelle*) – a non-written rule by which states reserve the right to keep certain goods like cinema and audiovisuals outside the agreement – was largely accepted during the final negotiations in Marrakech. This issue was on the agenda of the ministerial conference in Seattle in November 1999, but it was never discussed. Despite Seattle's failure, trade on cultural good and services will undoubtedly remain on the WTO agenda.

Professional associations should therefore advocate the vital role of their governments in protecting artistic pluralism through the promotion of their national cinematographic images and foreign trade. Cultural goods are definitely not simply merchandise. Governments must assume the responsibility of protecting and encouraging a healthy audiovisual sector and, where possible, a specific cinematographic industry through legislation and public funding.

As a consequence of the above-mentioned international trade policy developments, several filmmakers' associations are already closely co-operating to work out common proposals for the recognition of the specific cultural and artistic role of audiovisual goods.

It is hoped that this survey will provide a contribution to future research focusing on the cultural role of the image industry. Today this sector is the fastest growing economic sector, and official projections for the year 2005 predict an increase of 100% in employment in this sector for some countries compared with the 1990s.

An unbalanced cultural flow would appear to call for a fair equilibration between copyright protection for authors and the general public interest. At stake lies the recognition of a public domain guaranteeing free access to information and the right to the protection of cultural and artistic expression, both recognized by Article 27 of the Universal Declaration of Human Rights.

TABLES AND GRAPHS

1. Strong and weak points for each category of countries

Although analysts do not expect any foreseeable growth for cinematography (as opposed to the whole audiovisual sector) because of the competitiveness of digital technologies and market saturation, there is still room for quality films.

Large-producing countries, more than 200 productions

Favourable

- Large home markets and expanding broadcasting audiences allow a return on benefits and a strongly structured cinematography sector, particularly as regards the technical industry and trade.

Less favourable

- Market competition might slow down or stop the making of cultural or artistic films.

Potential

- Specialized taxation incentives to encourage independent film-makers and specialized distributors to make more films

Medium-producing countries, from 20 to 199 productions

Favourable

- State legal and financial support guarantees the existence of a national infrastructure and markets which might lead to the recognition of a public sector allowing free public access to quality films.

Less favourable

- National legal protectionism impedes international free film trade.

Potential

- New international legal frameworks should allow better and more balanced exchanges in the future, expanding national production capacities.

Small-and non-producing countries

Favourable

- Creativity does not suffer from high technical and organizational competition or financial constraints. Financing, although very limited, does not seek an immediate return on investment.

Less favourable

- The small size of national markets accounts for a structural lack of investments in the technical industry and film financing, limiting the number of national productions. Unfair international trade practices might also diminish domestic production.

Potentialities

- As it has been the case for communications and computer technologies, digital technologies create new and less expensive production opportunities, thus multiplying distribution capacities.

2. Typologies of the countries defined by annual film production: main indicators

	Large-producing: more than 200 films	Medium-producing: 20-199 films	Small-producing: 1-19 films	Non-producing countries
No. Inhabitants	515,513,000	57,805,000	22,876,000	5,588,200
Percentage living in cities*	84.9	82.5	70.4	68.8
HDI[1]*	0.807	0.786	0.717	0.581
GNP (in $US)*	10,922	9,957	7,038	3,726
Cinema theatres*	9,793	1.537	702	433
Cinema audiences*	(388,000,000 USA)	49,185,458	14,081,399	8,907,800
TV sets*	151,780,000	15,165,040	2,725,000	291,000
TV audiences*	---	28,336,883	6,975,143	1,067,500

* Averages of main indicators per country.

[1] United Nations Human Development Indicator.

3. Evolution of national production in three countries representative of large-, medium-- and small-producing countries (1988-1999). The production of these three countries is their decade average.

Country	1975	1985	1995	1998
United States	156	264	385	458
Egypt	47	103	72	48
Cuba	1	10	6	5

4. Evolution in the number of imported films in the same countries and periods as (3).

Country	1975	1985	1995	1998
United States	---	182	141	477
Egypt	323	243	220	---
Cuba	124	125	55	---

5. Evolution in average number of movies seen per inhabitant, in the same countries and periods as above.

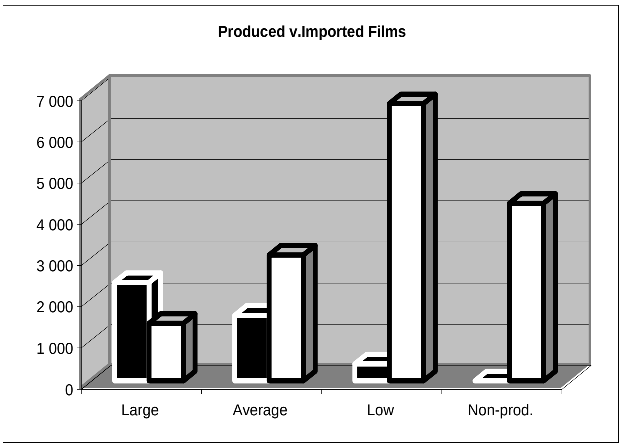
Country	1975	1985	1995	1998
United States	5.7	4.4	4.6	---
Egypt	1.7	1.2 *	0.2	---
Cuba	3.6	7.6	2.2	---

* = estimate

6. Relation between locally-produced and imported films, Large, medium and small producing countries

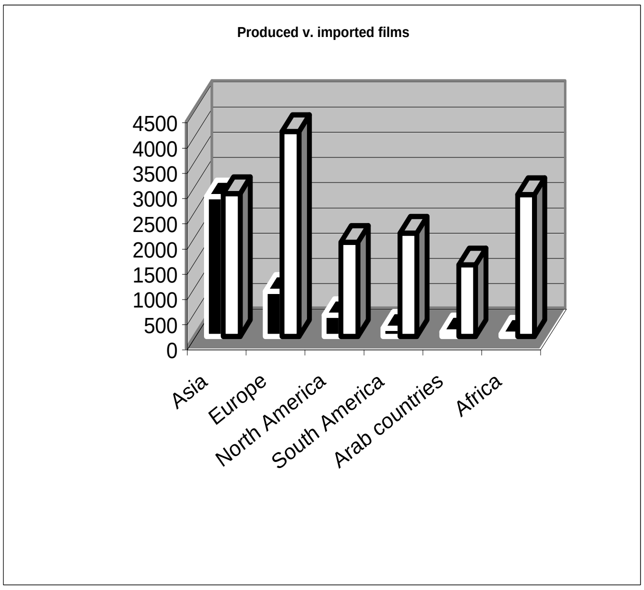
Ratio between produced and imported films
Large, average, low and non-producing countries

Country	Produced films	Imported films
Large	2 387	1 390
Average	1 588	3 055
Low	408	6 723
Non-prod.	0	4 307



Ratio between produced and imported films

Region	Produced films	Imported films
Asia	2769	2829
Europe	894	4059
North America	419	1865
South America	162	2046
Arab countries	90	1418
Africa	46	2811



7. Social and cultural indicators, film production and film import, all countries included.

1. Country name
2. Lingua franca or int'al communication language
3. Region: UNESCO statutory region
4. GNP: Gross National Product
5. Inhabitants (000)
6. Urban population concentration
7. Percentage pupils at primary schools
8. Percentage of literacy
9. IDH, Human Development Indicator
10. Books published per year
11. Films produced nationally (yearly average'88-98)
12. Foreign films imported (1995)

1. Country name	2. Lingua franca	3. Regio	4. GNP	5. Inhab. (000)	6. Inurb %	7. School %	8. Literacy %	9. IDH	10. Books	11. ProFilm Average 88-'99	12. Imp Films 95
Afghanistan	En	ASA		139	20.4	62.2			0	3	--
Albania	Al	EUR	2.788	3401	37.5	85	59	0.667	0	11	--
Algeria	Ar	ARB	5.442	28784	60	59.3	66	0.737	323	2	--
Andorra	Fr	EUR	1.19	71	62.5	99			57	0	--
Angola	Po	AFR	1.6	11185	33	42.5	31	0.335	14	1	--
Antigua	En	ALA	8.977	66	35.1	96	76	0.892	0	0	--
Argentina	Sp	ALA	8.937	35219	88.4	96	77	0.884	9065	47	--
Armenia	Ru	ASA	1.737	3638	69	70.8	98.8	0.651	224	3	28
Aruba	Ne	ALA	0.1							0	--
Australia	En	ASA	19.285	14569	84.7	78.1	99	0.931	10835	18	239
Austria	Ge	EUR	14.324	8106	55.6	97.1	90	0.932	7987	22	219
Azerbaidjan	Ru	ASA	1.67	7954	56.1	96.3	72	0.636	374	3	5
Bahamas	En	ALA	15.875		89	98.1	75	0.894	15	0	--
Bahrain	En	ARA	15.321	570	90.8	84.4	85	0.87	78	0	--
Bangladesh	En	ASA	1.331	120100	18.8	37.3	39	0.368	0	77	--
Barbados	En	ALA	11.051	261	48.3	97.3	76.3	0.907	77	0	19
Belarus	Ru	EUR	4.713	10348	72	97.9	80	0.806	3345	2	73
Belgium	Fr/Nl	EUR	20.985	10159	97.1	99	86	0.932	13913	7	477
Belize	En	ALA	5.59	219	46.6	70	68	0.806	70	0	124
Benin	Fr	AFR	1.696	5563	42.5	35.5	35	0.368	84	0	219
Bhutan	En	ASA	1.289	1812	5.3	41.1	31	0.338	0	0	--
Bolivia	Sp	ALA	2.598	7593	58.4	82.5	66	0.589	447	4	149
Bosnia	Sc	EUR	0.1	3628	49.9				1008	0	--
Botswana	En	AFR	5.367	5563	32	68.7	71	0.673	158	0	--
Brazil	Po	ALA	5.362	161087	78.6	82.7	72	0.783	21574	86	--
Brunei	En	ASA	30.447	300	59.2		70	0.882	45	0	--
Br_Virgin_Isl	En	ALA	0.1	19						0	--
Bulgaria	Ru	EUR	4.533	110912	71.3	93	66	0.78	5925	11	200
Burkina_Faso	Fr	AFR	0.796	10780	29.1	18.7	20	0.796	4	5	197
Burundi	Fr	AFR	0.698	6221	7.7	34.6	31	0.247	54	0	50
Cambodia	Fr	ASA	1.084	10274	21.3	35	58	0.384	0	0	268
Cameroon	Fr	AFR	2.12	13560	45.8	62.1	46	0.468	22	2	--
Canada	En	AMN	21.495	29680	76.7	99		0.96	22208	24	220
Cape_Verde	Po	AFR	1.862	396	56.3	69.9	64	0.547	10	0	108
Chad	Fr	AFR	0.7	6516	21.6	47	25	0.288	0	0	--
Chile	Sp	ALA	9.129	14421	86.2	95	72	0.891	1820	1	220
China	Ch	ASA	2.604	1E+06	31.1	80.9	58	0.626	1E+05	469	185
Colombia	Sp	ALA	6.107	36444	73.2	91.1	70	0.848	1481	3	--
Comoros	En	ALA	1.366	632	28.3	56.7	39	0.412	0	0	393

1. Country name	2. Lingua franca	3. Regio	4. GNP	5. Inhab. (000)	6. Inurb %	7. School %	8. Literacy %	9. IDH	10. Books	11. ProFilm Average 88-'99	12. Imp Films 95
Congo	Fr	AFR	2.41	2668	59.9	73.9	56	0.5	0	0	--
Congo_Dm_Rep	Fr	AFR	0.429	46812	29.3	76.4	38	0.381	64	0	--
Cook_Islands	En	ALA	0.1							0	--
Costa_Rica	Sp	ALA	5.919	3500	50.2	94.7	68	0.889	963	2	49
Croatia	SC	EUR	3.96	4501	65.3	97	67	0.76	2671	3	--
Cuba	Sp	ALA	3	11018	76.5	95.4	63	0.723	932	6	55
Cyprus	En	ASA	13.701	756	54.6	6	96.59	0.907	1040	1	347
Czech_Rep	Cz	EUR	9.201	5347	65.5	99	70	0.882	9309	14	153
Denmark	Da	EUR	21.341	5237	85.3	99	99	0.927	11973	15	225
Djibouti	Fr	ARB	1.27	617	83.2	45	20	0.319	0	0	--
Dominica	En	ALA	6.118	70	41	94	77	0.873	77	0	--
Dominican Rep	Sp	ALA	3.933	7961	65.4	81.5	68	0.718	2219	0	173
Ecuador	Sp	ALA	4.626	11699	59.1	89.6	72	0.775	11	4	510
Egypt	En	ARB	3.846	63721	45	50.5	69	0.614	3108	72	220
El Salvador	Sp	ALA	2.417	5796	45.3	70.9	55	0.592	15	0	124
Equat Guinea	Sp	AFR	0.1	7518						0	--
Eritrea	En	AFR	0.96	3280	17.7	25	24	0.269	106	0	--
Estonia	Ru	EUR	4.294	1471	73.3	99	72	0.776	2291	3	80
Ethiopia	En	AFR	0.427	58243	13.6	48.2	34.5	0.427	240	1	65
Fiji	En	ASA	5.763		41	91.3	79	0.863		0	--
Finland	Fi	EUR	17.417	5154	63.5	99	97	0.94	12539	8	137
France	Fr	EUR	20.51	58333	72.8	99	90	0.946	45331	183	384
Gabon	Fr	AFR	3.759	1106	50.9	62.6	60	0.562	0	0	--
Gambia	En	AFR	0.939	1141	26.1	37.2	34	0.281	21	0	171
Georgia	Ru	ASA	1.585	5442	59	94.9	69	0.637	314	5	--
Germany	Ge	EUR	19.675	81922	86.8	99	81	0.924	70643	63	226
Ghana	En	AFR	1.96	17832	36.8	63.4	44	0.468	28	1	36
Greece	Gr	EUR	11.265	10490	65.7	96.7	82	0.923	4066	25	160
Grenada	En	ALA	5.137	90		98	78	0.843	337	0	--
Guatemala	Sp	ALA	3.208	10928	41.9	55.7	46	0.572	0	3	182
Guinea Conakry	En	AFR	1.103	7518	30.4	34.8	24	0.271	0	1	0
Guinea_Bissau	Po	AFR	0.793	1091	22.6	53.9	29	0.291	0	0	0
Guinea_Equat	Sp	AFR	1.673	7518	43.5	77.8	64	0.462		0	89
Guyana	En	ALA	2.729	838	37.2	97.9	67	0.649	46	4	--
Haiti	Fr	ALA	0.896	7259	32.1	44.1	29	0.338	271	0	--
Honduras	Sp	ALA	2.05	5816	48.5	72	60	0.575	22	0	--
Hungary	Ru	EUR	6.437	10049	65.2		99	0.857	10108	12	203
Iceland	Ic	EUR	23.576	271	91.8	99		0.942	1429	7	235
India	En	ASA	1.348	944850	27	51.2	56	0.446	11460	839	141
Indonesia	En	ASA	3.74	200453	35	83.2	62	0.668	6303	14	150
Iraq	Ir	ARB	3.159	20607	79.5	56.8	53	0.531	0	1	277
Ireland	En	EUR	16.601	3554	57.6	99	88	0.929	2679	17	33
Israel	Is	ASA	16.023	5664	91.6	95	75	0.913	4608	14	--
Italy	It	EUR	19.363	57226	66.3	98.1	73	0.921	32673	99	150
Ivory Coast	Fr	AFR	1.668	14992	45.3	21.9	52.3	0.422	--	2	152
Jamaica	En	ALA	3.816	2491	56.1	84.4	65	0.736	71	0	--
Japan	Ja	ASA	21.581	125351	77.7	99	78	0.94	35496	238	592
Jordan	Ar	ARB	4.187	5581	72.6	85.5	66	0.73	500	--	--
Kazakhstan	Ru	ASA	3.284	16820	60.4	97.5	73	0.709	1148	10	--
Kenya	En	AFR	1.404	27799	28.5	77	55	0.463	239	0	--
Kiribati	En	ASA	0.1		35.7					0	126
Korea_PDR	Ko	ASA	3.965	22466	61.5	95	75	0.765		37	177

1. Country name	2. Lingua franca	3. Regio	4. GNP	5. Inhab. (000)	6. Inurb %	7. School %	8. Literacy %	9. IDH	10. Books	11. ProFilm Average 88-'99	12. Imp Films 95
Korea_Rep	Ko	ASA	10.656	43314	81.6	97.9	82	0.89	34204	63	--
Kyrgyzstan	Ru	ASA	1.93	4469	38.5	97	73	0.635		0	--
Lao_Rpd	En	ASA	2.484	5035	22.3	55.8	50	0.459	64	0	101
Latvia	Ru	EUR	5.708	2424	73.3		78	0.711	1677	2	247
Lebanon	Ar	ARB	0.1	3084	87.9					5	148
Lesotho	En	AFR	1.109	2078	23.8	70.5	56	0.457	0	0	118
Liberia	En	AFR	0.1	2245	47.3	61.7	27.6		0	0	--
Libyan_Ar_Jam	Ar	ARB	6.125	5593	86.8	75	91	0.801	115	2	--
Lithuania	Ru	EUR	3.3032	3728	72.8	99	67	0.762	2885	3	174
Luxembourg	Fr	EUR	34.155	412	89	99	58	0.899	681	1	218
Macao	Ch	ASA	0.1		98.8					0	--
Macedonia	Yu	EUR	3.965	2174	60.3		94	0.748	672	2	352
Madagascar	Fr	AFR	0.694	15393	27.3	45.8	33	0.35	114	0	--
Malawi	En	AFR	0.694	9845	13.7	55.8	67	0.32	243	0	218
Malaysia	En	ASA	8.685	20581	54.4	83	62	0.832	4050	12	220
Maldives	En	ASA	2.2	263	34.6	93	71	0.611	0	0	--
Mali	Fr	AFR	0.543	11134	27.8	29.3	17	0.229	6	3	--
Malta	En	EUR	13.009	369	89.6	86	76	0.887	417	0	--
Marshall_Isl	En	ASA	0.1							0	--
Mauritania	Fr	ARB	1.593	2333		36.9	36		0	0	--
Mauritius	En	AFR	13.172	1129	40.7	82.4	61	0.831	84	1	--
México	Sp	AMN	7.384	92718	75.8	89.2	66	0.853	2608	10	288
Moldova	Ru	EUR	1.576	4444	52.6	98.9	67	0.612	797	6	--
Monaco	Fr	EUR	0.1		100				41	0	--
Mongolia	Mo	ASA	3.766	2515	60	82.2	52	0.661		3	--
Morocco	Fr	ARB	3.681	27021	49.4	42.1	46	0.566	354	4	394
Mozambique	Po	AFR	0.986	17796	43.4	39.5	25	0.281	66	0	121
Myanmar	Ma	ASA	1.051	45922	27.4	82.7	48	0.475	300	85	0
Namibia	En	AFR	4.027	1575	38.8	40	84	0.57	193	4	96
Nepal	En	ASA	1.084	22021	14.2	35	58	0.348	0	0	--
Neth_Antilles	En	ALA	0.1	195						0	--
Netherlands	Nl	EUR	19.238	15575	89.1	99	91	0.94	34067	16	44
New_Zealand	En	ASA	16.851	3602	84.4	99	94	0.937		4	--
Nicaragua	Sp	ALA	1.58	4238	62.8	65.3	62	0.53	41	0	--
Niger	Fr	AFR	0.787	9466	23.8	13.1	15	0.206	5	0	346
Nigeria	En	AFR	1.351	115020	40	55.6	50	0.393	1562	20	43
Norway	En	EUR	21.346	4348	73.3	99	92	0.943	6846	12	109
Oman	En	ARB	10.018	2302	13.6	35	60	0.718	24	0	--
Pakistan	En	ASA	2.154	139973	35.1	37.1	38	0.445	124	64	134
Panama	Sp	ALA	6.104	2677	55.9	90.5	70	0.864	22	0	--
Papua_New_Gu	En	ASA	2.821	4400	16.3	71.2	38	0.525		0	--
Paraguay	En	ALA	3.531	4957	54.8	91.9	62	0.706	152	0	--
Peru	Sp	ALA	3.645	23944	72.2	88.3	81	0.717	1993	1	--
Philippines	En	ASA	2.681	69283	53.6	94.4	78	0.672	1233	456	235
Poland	Ru	EUR	5.002	38601	65.1	99	79	0.834	10874	20	86
Portugal	Po	EUR	12.326	9808	36	89.6	81	0.89	6667	14	195
Qatar	En	ARB	18.403	558	92.8	78.9	73	0.84	371	0	
Romania	Ru	EUR	4.037	22655	55.8	96.9	62	0.748	4074	9	85
Russian Fed	Ru	EUR	4.370	147000	--	87	--	0.747	36237	46	118
Rwanda	En	AFR	0.352	5397	7.7	59.2	37	0.187	207		203
Samoa	En	ASA	2.726	166	21.3	98	74	0.684		0	122
San_Marino	It	EUR	0.1	30	89.8				0	0	66

1. Country name	2. Lingua franca	3. Regio	4. GNP	5. Inhab. (000)	6. Inurb %	7. School %	8. Literacy %	9. IDH	10. Books	11. ProFilm Average 88-'99	12. Imp Films 95
Sao_Tome	Po	AFR	1.704	8532	49.2	67	57	0.534		0	71
Saudi_Arabia	En	ARB	9.338	558	79.3	61.8	56	0.774	28	0	
Senegal	Fr	AFR	1.596	8532	42.8	32.1	31	0.326	0	0	
Seychelles	Fr	AFR	7.891	80	70.8	88	61	0.845	0	0	
Sierra_Leone	En	AFR	0.643	4297	40.6	30.3	28	0.176	0	2	271
Singapore	En	ASA	20.987	3384	100	91	72	0.9		25	43
Slovakia	Ru	EUR	6.389	5347	59.3	99	72	0.873	3481	4	0
Slovenia	Ge	EUR	10.404	1924	64.5	96	74	0.886	2906	2	51
Solomon Isl	En	ASA	0.1	391	17,7	62	47	0.556	0	0	---
Somalia	En	ARB	0.1	9822	23.9	27	10.3		0	--	--
South_Africa	En	AFR	4.291	42392	51.1	81.4	81	0.716	4574	--	--
Spain	Sp	EUR	14.324	39674	76.7	97.1	90	0.934	44261	45	500
Sri_Lanka	En	ASA	3.277	18100	22.5	90.1	66	0.711		58	--
St_Kitts	En	ALA	9.436			90	78	0.853		0	--
St_Lucia	En	ALA	6.182	140	50.4	82	74	0.838	63	0	--
St_Vincent	En	ALA	5.65	110	48.4	82	78	0.836	0	0	--
Sudan	En	ARB	1.084	27291	26.6	44.8	31	0.333	138	1	70
Suriname	Ned	ALA	4.711	432	51	92.7	71	0.792	0	0	164
Swaziland	En	AFR	2.821	881	34.1	75.2	72	0.582	0	0	--
Sweden	En	EUR	18.54	8819	83.1	99	82	0.937	13882	30	--
Switzerland	Ge/Fr/It	EUR	24.967	7224	61.1	99	76	0.93	15378	13	--
Syrian_Ar-Rep	En	ARB	5.397	14574	53.8	69.8	64	0.755	40	2	370
Tajikistan	Ru	ASA	1.976	5935	31.9	3.3	79	0.58	231	1	145
Tanzania	En	AFR	0.1	30799	25.1	66.8	34	0.357	172	1	160
Thailand	En	ASA	7.104	5935	20.5	93.5	55	0.833	7626	194	219
Togo	Fr	ALA	1.109	4201	31.8	50.4	50	0.365	0		
Tonga	En	ASA	0.1	99	42.3						
Trinidad	En	ALA	9.124	1297	67.8	97.9	67	0.88	26		
Tunisia	Fr	ARB	5.319	9156	57.6	65.2	67	0.748	539	2	--
Turkey	Tu	ASA	5.193	61797	70.9	17.7	81.6	0.772	4473	63	--
Uganda	En	AFR	1.37	20256	12.8		61.1	0.328	314	0	171
Ukraine	Ru	EUR	2.718	51608	70.9	98.8	76	0.689	5002	6	39
Un_Arab_Em	En	ARB	16	2260	93.8	78.6	82	0.866	293	0	
United_Kingdom	En	EUR	18.62	58144	89.6	99	86	0.931	95015	78	278
Uruguay	Sp	ALA	6.752	3204	90.5	97.1	75	0.883	1143	1	25
USA	En	AMN	26.397	216000	76.4	99	90	0.942	51863	385	477
Uzbekistan	Ru	ASA	2.23	23209	42	97.2	73	0.662	1340	10	0
Vanuatu	En	ASA	2.276	174	19.3	64	52	0.547		0	
Venezuela	Sp	ALA	8.12	22311	93.2	91	68	0.861	3660	4	
Viet_Nam	En	ASA	1.208	75181	21	93	55	0.557	5581	16	179
Yemen	En	ARB	0.805	15678	34.5	41.1	52	0.361	0	0	44
Yugoslavia	Ru	EUR	0.1	10294	64.5	92.7	65		2799	8	131
Zambia	En	AFR	0.962	8275	45.1	76.6	48	0.369	454	0	
Zimbabwe	En	AFR	2.196	11439	32.8	84.7	68	0.513	232	0	215

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Questionnaire

UNESCO

United Nations Educational, Scientific and Cultural Organization
Division of Creativity, Cultural Industries and Copyright

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QUESTIONNAIRE ON CINEMA

1. The present questionnaire is intended to collect statistics on certain aspects of cinema activities in the past few years. It differs from previous UNESCO surveys in that it tries to get an overall view, for each country, of national structures and policies (legislation, economy, participants) concerning cinema and the visual arts for each country. The information thus obtained will figure in a widely distributed report.

2. The questionnaire is in three parts: (1) The public sector structure, legislation and state participation; (2) The different participants in the production circuit and the market, following the logic of a film project (script, financing, production, distribution); and (3) education and training programmes.

3. This survey seeks your help in identifying, gathering and forwarding legislation on cinema, copyright, customs and fiscal matters. Any such legal texts in English, French or Spanish would be extremely useful.

4. When completing the questionnaire, please mark cases where no data is available or when the data requested is irrelevant or negligible with the acronym 'NA' (no answer)

5. Please indicate the name and address of the organization providing the data and the name and function of the person filling in the present form.

Name: ______________ Address: ______________.
Tel. ______________ Fax: ______________ E-mail ______________
Name of person filling in the form: ______________ Occupation ______________.
Direct tel. no.: ______________.

6. Please do not hesitate to make suggestions or comments to complete the data in this form.

Thank you for your kind assistance.

Page 2

First part. ***Legal basis***

1.1 Is there a national policy for cinema or audiovisual industries in your country backed by a legal framework ?

YES ☐ NO ☐ (NA) ☐

Name_________________________ Enforcement year______

1.2 Has your country ratified international or regional agreements concerning copyright protection and free circulation of cultural goods ? YES ☐..NO ☐ (NA) ☐

For instance ; Enforcement year

- The Berne Convention for the Protection of Literary and artistic Works (1979) YES ☐ NO ☐(NA) ☐ ______

- Universal Copyright Convention (Geneva, 1952), revised in Paris, 1971 YES ☐ NO ☐ (NA) ☐ ______

- International Convention for the Protection of Performers, Producers of Phonograms and Broadcasting Organizations (Rome, 1961) YES ☐ NO ☐ (NA) ☐ ______

- Convention for the Protection of Producers of Phonograms against Unauthorized Duplication of their Phonograms (Geneva,1971) YES ☐ NO ☐ (NA) ☐

- The Florence Agreement on the Importation of Educational, Scientific and Cultural Materials (1950) YES ☐ NO ☐ (NA) ☐

- The Nairobi Protocol (1976) to the Florence Agreement YES ☐ NO ☐ (NA) ☐

- Others, particularly regional agreements :
____

1.3. Does a specific national legislation exist aimed at the protection of copyright applicable to the works of authors of cinematographic and audiovisual goods ? YES ☐ NO ☐ (NA) ☐

Title____ Enforcement year ________

1.4 Is there a specific law for the protection of certain sections of the public (e.g. a law protecting young persons?) YES ☐ NO ☐ (NA) ☐
Indicate its aim:
____

Title____ Enforcement year ________

1.5 Is there a national law against piracy ? YES ☐ NO ☐ (NA) ☐

Title____ Date of enforcement ________

Page **3**

Official organizations

2.1 Is there a national cinematography (regulating) centre ? YES ☐ NO ☐ (NA) ☐

Name ________________________ Function _________________________________

2.2 Is there a national or government agency for official registration of films or audiovisual materials (e.g. registration of copyrights) ? YES ☐ NO ☐ (NA) ☐

Name____ Year of creation _______

2.3. Is there a national body for the conservation of film and audiovisual materials ? (e.g. national archives or film library) YES ☐ NO ☐ (NA) ☐

Name__________________________ Address _____________________________________

Inducements

3.1 Does the government contribute to financing film productions ? YES ☐ NO ☐ (NA) ☐
3.2 Please indicate the average percentage ceiling of such governmental financial participation ? _______ %
3.3 Is this participation regarded as a direct government grant ? YES ☐ NO ☐ (NA) ☐
3.4 Are the funds managed by professionals themselves ? YES ☐ NO ☐ (NA) ☐
3.5.1 Are they considered advances on ticketing revenues ? YES ☐ NO ☐ (NA) ☐
3.5.2 Do ticket taxes directly feed a special production fund ? YES ☐ NO ☐ (NA) ☐
3.6 Are there direct grants for film distribution (e.g. to finance copying or advertising campaigns) ? YES ☐ NO ☐ (NA) ☐
3.7 Is there a tax-reduction scheme to encourage film investors ? YES ☐ NO ☐ (NA) ☐

Financing

4.1 Are there other regular financing sources for film production ? YES ☐ NO ☐ (NA) ☐
4.1.1 Is there private sector funding for films ? YES ☐ NO ☐ (NA) ☐
4.1.2 Are there particular grants for young filmmakers ? YES ☐ NO ☐ (NA) ☐
4.1.3 Are there individual grants for script-writing ? YES ☐ NO ☐ (NA) ☐
4.2 Is there tax exemption for production companies, labs or studios ? YES ☐ NO ☐ (NA) ☐

Other kinds of financing

4.3.1 Does any film-funding come from abroad ? YES ☐ NO ☐ (NA) ☐
4.3.2. Specify the sources
Bilateral international co-operation YES ☐ NO ☐ (NA) ☐
Multilateral co-operation YES ☐ NO ☐ (NA) ☐
Other official foreign investments YES ☐ NO ☐ (NA) ☐

4.3.3 What is the average percentage of foreign financing in an international film co-production.? (*National production or co-production here indicates a professional project with local financing, a national producer and processed in the country. An international production, on the other hand, is a project in which at least one participant or process comes from abroad*) ______ % (NA) ☐

4.4. Are the public or privately owned television companies compelled to contribute in film financing ? YES ☐ NO ☐ (NA) ☐

4.4.1 Is this contribution a mandatory fixed share /quota to support the film industry ? YES ☐ NO ☐ (NA) ☐
4.4.2 Is it an advance on broadcasting rights ? YES ☐ NO ☐ (NA) ☐
4.4.3 Is it a kind of financial guarantee ? YES ☐ NO ☐ (NA) ☐

4.5 What is the average percentage of broadcasting's financial contribution to film production ? YES ☐ NO ☐ (NA) ☐

4.6 If the government (through ministerial departments, official agencies, but excluding public broadcasters) finances film production or audiovisual materials, please give an estimate of the number of productions receiving grants and the average share for each production in US.$. for the following categories per year.

					NUMBER	AMOUNT US.$.
4.6.1	Institutional productions	YES ☐	NO ☐	(NA) ☐	_______	_______$
4.6.2	Educational productions	YES ☐	NO ☐	(NA) ☐	_______	_______$
4.6.3	Cultural productions	YES ☐	NO ☐	(NA) ☐	_______	_______$
4.6.4	Feature film productions	YES ☐	NO ☐	(NA) ☐	_______	_______$

4.7 The same question as in 4.6, but specifically concerning public (institutional/ governmental) information film and audiovisual productions in the following categories:

					NUMBER	AMOUNT US.$
4.7.1	Public health	YES ☐	NO ☐	(NA) ☐	_______	_______$
4.7.2	School television	YES ☐	NO ☐	(NA) ☐	_______	_______$
4.7.3	Literacy campaigns	YES ☐	NO ☐	(NA) ☐	_______	_______$

Part two. ***Professional organizations***

5.1 Do filmmakers, directors and/or technicians benefit from a national legal status?
YES ☐ NO ☐ (NA) ☐)

Which ? Please indicate

Title____ Since _______
Title____ Since _______
Title____ Since _______

5.2 Do national professional associations exist for filmmakers and other cinema-related professionals ?
YES ☐ NO ☐ (NA) ☐Which ? Please indicate

Name _______________________Address______________________________
Name _______________________Address______________________________
Name _______________________Address______________________________

5.3 **Please enclose a recent list of national professional associations.**

The production cycle

This part of the questionnaire mainly concerns audiovisual production such as cinema, video or digital imagery (such as CD-rom or DVD)

6.1 How many professionals are involved in the audiovisual *sector (including all kinds of image support and related industries*) Please indicate the corresponding percentage for the following sub-sectors.

Total number of professionals employed in the audiovisual sector	Percentage, cinema	Percentage, television	Percentage, video	
_______%	_______ %	_______ %	_______%	(NA)

6.2 Please indicate the approximate number of companies offering services to the cinema and audiovisual sector in your country for each sub-group below. Please also give the approximate number of employees for each sub-group.

Film shooting *(hiring equipment, camera, sound recording, lighting**…)***

Number of:
6.2.1 Cinematographic service companies _______ Total number of employees _______
6.2.2 Video or digital imagery companies _______ Total number of employees _______

Processing, editing, image & sound (studios)

6.3 Please indicate the approximate number of companies providing cinematographic services
6.3.1 Number of cinematographic laboratories _______ Number of employees _______
6.3.2 Video studios, Number _______Number of employees _______

6.4 Please indicate the total annual number of productions made in your country, mentioning the year referred year to. These productions might comprise feature films, television productions or artistic creations and educational tools.

Year ______ Number of film features _______ Videos _______ CD-rom/DVD ______

6.5 Please indicate the total turnover in US.$ for all productions made in your country. (*National production or co-production here indicates a professional project with local financing, a professional project with local financing, a national producer and processed in the country. An international production, on the other hand, is a project in which at least one participant or process comes from abroad*).

6.5.1 Year ______ Total costs for national productions in US $ _______
Total costs for international co-productions in US $ _______

6.5.2 What countries do the foreign participants, producers or investors represent ?
(Please start with the most important and continue in decreasing order)

1 ________________ 2 ___________________ 3 _________________

Distribution

7.1 Please indicate the number of feature films, videos or digital productions annually imported to be shown in film theatres, distributed through 'video-shops' or broadcast by (public or privately-owned) television channels.
Reference year ______ Number of foreign productions _______

Countries of origin, in decreasing order 1 ____________ 2 ____________ 3 ____________

7.2.1 How many national or foreign film distributors operate in your country? What is the number of film theatres, national (public or private-owned) television broadcasters, (earth stations - as opposed to satellite programmes) which operate in your country ?

Number of national distributors ______ Number of foreign distributors ______

Reference year _______ Number of film theatres (Cinemas) ______
Number of video theatres ______
Number of 'video-shops' ______

7.2.2 Please indicate the total film theatre (seat) capacity ? ______
7.2.3 What is the potential viewing' audience for television ? ______

7.3.1 Please indicate the total number of entries (ticket sales) in theatres (both cinema and video) for the entire country ? Please also specify the total income from entrance ticket as well as the average price for one entry ticket ?

Year	Audience number	Income in $	Average ticket price in US $
______	_______	_______	_______

7.3.2 Is it possible to mention a global trend for film theatre audiences ?

Increasing ? YES ☐ NO ☐ (NA) ☐ Decreasing ?YES ☐ NO ☐ (NA) ☐
Unchanged ? YES ☐ NO ☐ (NA) ☐

7.4 How many television channels operate from your national territory ? Number ______ NONE ☐
How many channels are government-owned ? ______ How many are private ? ______
How many channels have a national audience ? ______ How many are local ? ______

8 What kind of national programmes are broadcast by these (public or private-owned) stations ?

8.1 Films YES ☐ NO ☐ (NA) ☐
8.2 Series (fiction) YES ☐ NO ☐ (NA) ☐
8.3 Documentaries YES ☐ NO ☐ (NA) ☐
8.4 Educational (school) programmes YES ☐ NO ☐ (NA) ☐
8.5 Advertising (promotional films/spots) YES ☐ NO ☐ (NA) ☐

8.6 How many hours are broadcast annually and what percentage of the total programming do the following productions represents?

8.6.1 National productions : ________ Hours Percentage _______ %
8.6.2 International co-productions : ________ Hours _______ %
8.6.3 Foreign productions: ________ Hours _______ %

8.7 Are the foreign feature films broadcast on television, shown in theatres or distributed on cassette mainly translated (dubbed) ?
YES ☐ NO ☐ (NA) ☐ or subtitled ? YES ☐ NO ☐ (NA) ☐

8.8 Please specify the approximate number of household video recorders (VCRs) in your country ?
Number of video recorders ______ Data for the year _______

8.9 Please give the number of households connected to parabolic (television) antennas

8.10 Please give an estimate of the number of households connected to the (earth-) cable television ?

Page 7

Festivals

9.1 Please indicate the names and specialization's of the main national or local film festivals.

Name____________________________________ Subject _________________________________
Name____________________________________ Subject _________________________________
Name____________________________________ Subject _________________________________

9.2.1 How many national feature films have been presented at foreign film festivals during the last five years (since '94) ? Number _______

9.2.2 Which foreign film festivals have presented films from your country ?

1______________________________________
2______________________________________
3 ______________________________________
4______________________________________

Part three ***School training***
10.1.1 Is an introduction to cinema included in the official school curricula? ☐
10.1.2 At which age? Please indicate below

LESS THAN 10 YEARS or BETWEEN 10 and 14 YEARS or MORE THAN 14 YEARS (NA) ☐

Professional training
10.2.1 In your country are there, specialized, secondary/technical or tertiary level, centres for cinema, television or audiovisual arts training/education ? YES ☐ NO ☐ (NA) ☐

10.2.2 Please give the main centres and their addresses.

NAME ADDRESS
____
____
____
________ ____

10.3 Please indicate the total annual number of students (of cinema or audiovisual arts) in your country ?
(NA) ☐ Number _______

10.4 Are any students from your country studying cinema or audiovisual production abroad ?

YES ☐ NO ☐(NA) ☐ How many on a yearly basis ? _______

10.5 *If you have an up-to-date list of national training centres, please enclose it with this form*

We would be grateful if you could ask your national authorities to send the different legal texts indicated at the beginning of this form. Your answers and these materials will form the basis of this comparative study. Thank you in advance for sending this questionnaire before 15August to the address indicated on the front page.

UNESCO, March 2000

Culture Sector
Division of Creativity, Books and Copyright