

# FILM INDUSTRIES IN CENTRAL ASIA – A VIEW TODAY AND TOWARDS THE FUTURE



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Author: Elena Larionova, master of philosophy, producer and programme director of cinema festivals, member of the Network for the Promotion of Asian Cinema (NETPAC).

Cover photo: Aigul Nurbulatova

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## SHORT SUMMARY

### **How does the film industry contribute to the development of creative economy in Central Asia?**

The overall economic impact, social role and status of cultural professionals involved in the film industries of the Central Asian countries (Kazakhstan, Kyrgyzstan, Tajikistan and Uzbekistan) remain relatively understudied. However, the film industry is recognized as one of the oldest and most developed cultural and creative industries of the region since the mid 20<sup>th</sup> century.

In this context, this publication assesses the film industries of Central Asia and concerned legislation. It provides recommendations for its future development, international cooperation prospects and ways to improve the status of local culture professionals and creative entrepreneurs working in the cinema sector. It also considers funding mechanisms of cinema industries.

At the time of the COVID-19 pandemic, development of the creative economy and related education and training initiatives for creative professions, with film industries among its main components, can be a key factor for economic recovery of the Central Asian region.

Responsible governmental authorities, representatives of public and private cinema organizations, creative educational institutions, professional organizations and unions are invited to implement the recommendations of this publication.



# **FILM INDUSTRIES IN CENTRAL ASIA – A VIEW TODAY AND TOWARDS THE FUTURE**

# CONTENTS

Abbreviations and acronyms	7
Background	11
<b>01. Overview of the state of the film industry in the Republic of Kazakhstan</b>	<b>12</b>
1.1. Brief historical survey of the film industry and its development	12
1.2. Brief review of national film industry related legislation	14
1.3. Key film industry organizations, principles of their operation and interaction. Film fora	15
1.4. Institutional capacity, including existing specialized educational and training institutions, programmes and schools	18
1.5. Gender considerations based on available data	20
1.6. Main challenges, issues and significant gaps impeding film industry development	21
<b>02. Overview of the state of the film industry in the Kyrgyz Republic</b>	<b>24</b>
2.1. Brief historical survey of the film industry and its development	24
2.2. Brief review of national film industry related legislation	26
2.3. Key film industry organizations, principles of their operation and interaction. Film fora	28
2.4. Institutional capacity, including existing specialized educational and training institutions, programmes and schools	33
2.5. Main challenges, issues and significant gaps impeding the development of culture industries, in particular the film industry	34
<b>03. Overview of the state of the film industry in the Republic of Tajikistan</b>	<b>36</b>
3.1. Brief historical survey of the film industry and its development	36
3.2. Brief review of national film industry related legislation	37
3.3. Key film industry organizations, principles of their operation and interaction. Film fora	41
3.4. Institutional capacity, including existing specialized educational and training institutions, programmes and schools	45
3.5. Main challenges, issues and significant gaps impeding the development of culture industries, in particular the film industry	47
<b>04. Overview of the state of the film industry in the Republic of Uzbekistan</b>	<b>50</b>
4.1. Brief historical survey of the film industry and its development	50
4.2. Brief review of national film industry related legislation	51
4.3. Key film industry organizations, principles of their operation and interaction. Film fora	53
4.4. Institutional capacity, including existing specialized educational and educational institutions, programmes and schools	57
4.5. Main challenges, issues and significant gaps impeding film industry development	58

05. Brief overview of COVID-19 pandemic impact on the region's economies	60
06. Recommendations for further development of the film industry in the region	62
6.1. General recommendations	62
6.2. Additional country recommendations	63
07. Review of UAIS implementation: Russian Federation case study	66
08. Overview of the structure and financing mechanisms of the world's leading film industries: country case studies	68
8.1. Centralized model: France	68
8.1.1. Brief historical survey of the development of the film industry	68
8.1.2. Key film industry organizations, principles of their operation and interaction	69
8.1.3. Financing mechanisms	72
8.1.4. Co-productionproject support map	74
8.1.5. Statistics	77
8.2. Decentralized model: Germany. General film industry indicators, features of national (federal) and regional funds	78
8.2.1. Germany's film industry in figures in 2019	78
8.2.2. Federal funds	79
8.2.3. Regional funds	82
8.3. Model of the Republic of Korea	86
8.3.1. Brief historical survey	86
8.3.2. Key film industry organizations, principles of their operation and interaction. Financing mechanisms	86
8.3.3. General film industry statistics for 2018	91
09. Review of leading foreign specialized higher education institutions	92
9.1. VGIK (S.A. Gerasimov All-Russian State Institute of Cinematography): historical survey, schools, valid agreements with universities in Central Asia, statistics	92
9.2. New York Film Academy (NYFA)	94
9.3. Film and TV School of the Academy of Performing Arts in Prague (FAMU)	96
10. European industry-specific education programmes potentially interested in the Central Asian region	98
10.1. Berlinale Talents at the Berlinale Film Festival	98
10.2. Open Doors at the Locarno Film Festival	100
10.3. Produire au Sud (PAS) at the Festival des 3 Continents	101

## ABBREVIATIONS AND ACRONYMS

<b>ACM</b>	World Cinema Support ( <i>fr. Aide aux Cinémas du Monde, France</i> )
<b>AFA</b>	Associate of Fine Arts
<b>AFCI</b>	Association of Film Commissioners International
<b>AFCNet</b>	Asian Film Commissions Network
<b>AG DOK</b>	German Documentary Association ( <i>ger. Arbeitsgemeinschaft Dokumentarfilm</i> )
<b>ALCA</b>	Book, Film and Audiovisual Agency ( <i>fr. Agence Livre Cinéma &amp; Audiovisuel, France</i> )
<b>AMCRS</b>	Animated Media Cluster of Stuttgart Region ( <i>ger. Medien- und Filmgesellschaft Baden-Württemberg, Germany</i> )
<b>APP</b>	Academy Preparation Programme
<b>AUCA</b>	American University of Central Asia (Bishkek, Kyrgyzstan)
<b>BA</b>	Bachelor of Arts
<b>BAFICI</b>	Talents Buenos Aires at the Buenos Aires International Independent Film Festival
<b>BFA</b>	Bachelor of Fine Arts
<b>BKM</b>	Federal Government Commissioner for Culture and Media ( <i>ger. Die Beauftragte der Bundesregierung für Kultur und Medien, Germany</i> )
<b>BLM</b>	Bavarian New Media Regulatory Authority ( <i>ger. Bayerische Landeszentrale für neue Medien, Germany</i> )
<b>BR</b>	Public Radio and Television Company ( <i>ger. Bayerischer Rundfunk, Germany</i> )
<b>CAACP</b>	Central Asia Arts and Culture Programme
<b>CCI</b>	<i>Cultural and Creative Industries</i>
<b>CEFS</b>	Czech Society for Film Studies
<b>CILECT</b>	International Association of Film and Television Schools ( <i>fr. Centre International de Liaison des Ecoles de Cinéma et de Télévision</i> )
<b>CIS</b>	Commonwealth of Independent States
<b>CIT</b>	corporate income tax
<b>CNC</b>	National Centre for Cinematography and Animation ( <i>fr. Centre National du Cinéma et de l'Image Animée, France</i> )
<b>CODA</b>	Corea Drama Production Association (RoK)
<b>COIC</b>	Committee for the Organization of Film Industry ( <i>fr. Comité d'Organisation de l'Industrie Cinématographique, France</i> )
<b>CUFS</b>	Central United Film Studio
<b>C2I</b>	concessional international taxation
<b>DFFF</b>	Federal Film Foundation of Germany ( <i>ger. Deutscher Filmförderfonds</i> )
<b>DRAC</b>	Regional Cultural Offices ( <i>fr. Directions régionales des affaires culturelles, France</i> )
<b>EFAD</b>	European Film Agency Directors association
<b>ELIA</b>	European League of the Institutes of Arts
<b>EU</b>	European Union
<b>FAMU</b>	School of Film and Television of the Academy of Performing Arts (Prague, Czech Republic)

<b>FDFA</b>	Federal Department of Foreign Affairs (Switzerland)
<b>FEZ</b>	free economic zone
<b>FFA</b>	Federal Film Agency ( <i>ger. Filmförderungsanstalt</i> , Germany)
<b>FFG</b>	Film Promotion Act ( <i>ger. Filmförderungsgesetz</i> , Germany)
<b>FIAPF</b>	International Federation of Film Producers Associations ( <i>fr. Fédération Internationale des Associations de Producteurs de Films</i> )
<b>FICG</b>	Guadalajara International Film Festival ( <i>sp. Festival Internacional de Cine en Guadalajara</i> , Jalisco, México)
<b>FKMWU</b>	Federation of Korean Movie Workers' Union (RoK)
<b>FNCF</b>	National Federation of French Cinemas ( <i>fr. Fédération Nationale des Cinémas Français</i> , France)
<b>GDP</b>	gross domestic product
<b>GEECT</b>	European Grouping of Film and Television Schools ( <i>fr. Groupement Européen des Écoles de Cinéma et de Télévision</i> )
<b>GIKUz</b>	State Institute of Arts and Culture of Uzbekistan (Tashkent, Uzbekistan)
<b>GMPF</b>	German Motion Picture Fund, Germany
<b>HADOPI</b>	Supreme Authority for the Dissemination of Works and Protection of Rights in the Internet ( <i>fr. Haute Autorité pour la diffusion des œuvres et la protection des droits sur internet</i> , France)
<b>IFCIC</b>	Institute for Financing of Film and Cultural Industries ( <i>fr. Institut pour le Financement du Cinéma et des Industries Culturelles</i> , France)
<b>IMF</b>	International Monetary Fund
<b>KazNAI</b>	T. Zhurgenov Kazakh National Academy of Arts (Almaty, Kazakhstan)
<b>KazNUI</b>	Kazakh National University of Arts (Nur-Sultan, Kazakhstan)
<b>KFCIN</b>	Korea Film Commissions & Industry Network (RoK)
<b>KFIT</b>	<i>Korean Funds-in-Trust</i> (RoK)
<b>KFPA</b>	Korean Film Producers Association (RoK)
<b>KGS</b>	Som (Kyrgyz national currency)
<b>KGUKI</b>	B. Beishenaliyev Kyrgyz State University of Culture and Arts (Bishkek, Kyrgyzstan)
<b>KOFIC</b>	Korean Film Council (RoK)
<b>KR</b>	Kyrgyz Republic
<b>KRW</b>	Won (national currency of the Republic of Korea)
<b>KZT</b>	Tenge (national currency of Kazakhstan)
<b>MA</b>	Master of Arts
<b>MDM</b>	Media Promotion of Central Germany ( <i>ger. Mitteldeutsche Medienförderung</i> , Germany)
<b>MFA</b>	Master of Fine Arts
<b>MM</b>	mass media
<b>NA</b>	national agency
<b>NAEM</b>	National Association of Electronic Media (Uzbekistan)
<b>NAFF</b>	Network of Asian Fantastic Films
<b>NFC</b>	national film certificate

<b>NRW</b>	North Rhine Westphalia (Germany)
<b>NYFA</b>	New York Film Academy
<b>OTT</b>	Internet video content technology/market ( <i>eng. Over the Top</i> )
<b>PAS</b>	Produced in the South ( <i>fr. Produire au Sud</i> , France)
<b>PGK</b>	Producers Guild of Korea (RoK)
<b>PIT</b>	personal income tax
<b>PPP</b>	public-private partnership
<b>PSC</b>	production service company
<b>QPE</b>	qualifying production expenditure
<b>RF</b>	Russian Federation
<b>RGa</b>	General Regulation on Financial Support for the National Centre for Cinematography and Animation ( <i>fr. Règlement Général des Aides Financières du Centre National du Cinéma et de l'Image Animée</i> , France)
<b>RGISI</b>	Russian State Institute of Stage Arts (St. Petersburg, Russia)
<b>RK</b>	Republic of Kazakhstan
<b>RoK</b>	Republic of Korea
<b>RPCA</b>	State Register of Cinema and Audiovisual Media ( <i>fr. Registre public du cinéma et de l'audiovisuel</i> , France)
<b>RT</b>	Republic of Tajikistan
<b>RTL</b>	Radio Television Luxembourg (Luxembourg)
<b>RUz</b>	Republic of Uzbekistan
<b>SACEM</b>	Society of Music Authors, Composers and Producers ( <i>fr. Société des auteurs, compositeurs et éditeurs de musique</i> , France)
<b>SNCCS</b>	State National Centre for Cinema Support (Kazakhstan)
<b>SDC</b>	Swiss Agency for Development and Cooperation
<b>SE</b>	state establishment
<b>SOFICA</b>	Society for Financing of the Film and Audiovisual Industry ( <i>fr. Sociétés de financement de l'industrie cinématographique et de l'audiovisuel</i> , France)
<b>SPV</b>	special purpose vehicle
<b>ST</b>	social tax
<b>SUE</b>	state unitary enterprise
<b>TJS</b>	Somoni (national currency of Tajikistan)
<b>TRIP</b>	Tax Rebate for International Production
<b>TSA</b>	tax-sheltered annuity
<b>TST</b>	television services tax
<b>TSV</b>	video and online streaming tax on audiovisual content
<b>TV</b>	television
<b>UAIS</b>	Unified Automated Information System
<b>UC KR</b>	Union of Cinematographers of the Kyrgyz Republic

<b>ULT</b>	unified land tax
<b>USAID</b>	US Agency for International Development
<b>USD</b>	Dollar (US national currency)
<b>USSR</b>	Union of Soviet Socialist Republics
<b>UZS</b>	Sum (national currency of Uzbekistan)
<b>VAT</b>	value added tax
<b>VFX</b>	visual effects
<b>VGIK</b>	All-Union State Institute of Cinematography. Currently, All-Russian State Institute of Cinematography named after S.A. Gerasimov (Moscow, Russia)
<b>VoD</b>	video on demand
<b>VPF</b>	virtual print fee
<b>VR</b>	virtual reality
<b>WCF</b>	World Cinema Fund
<b>WDR</b>	West German Broadcasting ( <i>ger. Westdeutscher Rundfunk</i> , Germany)
<b>WTO</b>	World Trade Organization
<b>XR</b>	extended reality
<b>ZDF</b>	2 <sup>nd</sup> German Television, State Public Broadcasting Organization ( <i>ger. Zweites Deutsches Fernsehen</i> , Germany)

## BACKGROUND

This study was executed within the framework of the “Strengthening Film Industries in Central Asia” Project for the UNESCO Almaty Cluster Office with the support of the UNESCO Korean Funds-in-Trust (KFIT) for the Development of Cultural and Creative Industries (CCIs), a key source of support for developing countries investing in creative economy sectors, as stipulated in the UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions (2005).

Earlier, within the framework of another UNESCO project, KFIT supported a series of actions to develop and strengthen CCIs in Uzbekistan.

Ratified by 146 countries around the world, the 2005 Convention represents the first international legal instrument recognizing the sovereign right of Governments to adopt culture policies and implement measures to promote the diversity of cultural expressions through various types of legislative, regulatory, institutional, and financial interventions.

The overall regional assessment of the Central Asian film industries is based on the interim reports executed in 2020 by the following experts: Gulnara Abikeyeva (Kazakhstan), Erke Dzhumakmatova (Kyrgyzstan), Sharofat Arabova (Tajikistan), as well as Nigora Karimova’s book “Uzbekistan’s Film Industry and Its Contribution to the Country’s Socio-Economic Development of 2019” written as part of the UNESCO project: “Creative Industries Development for the Diversity of Cultural Expressions – Strengthening the Sustainability of Creative Industry in Lao PDR, Uzbekistan and Rwanda” executed with the support of the Ministry of Culture, Sports and Tourism of the RoK.

The analytical report was prepared between November 2020 and March 2021, and includes an overview of the state of the film industries in the Central Asian Region (CAR), brief historical surveys, a review of national legislation related to the film industry, institutional capacities, an overview of key industry organizations, and gender considerations based on available data. The study identifies the main challenges, issues and significant gaps impeding the development of cultural industries, in particular the film industry, in the CAR, as well as offering recommendations for addressing them and further developing the Central Asian film industries, including cooperation prospects both at the regional and international levels.

The study also provides an overview of the structure of the world’s leading film industries based on the examples of France, Germany and the Republic of Korea, and of the corresponding financing mechanisms.

Particular attention within the report is paid to reviewing the leading foreign specialized higher education institutions and European educational programmes either already present or potentially interested in establishing partnerships in the Central Asian Region.

# 01. OVERVIEW OF THE STATE OF THE FILM INDUSTRY IN THE REPUBLIC OF KAZAKHSTAN



Shooting of the movie "Akyn". © Yuliya Kim

## 1.1. Brief historical survey of the film industry and its development

Two stages can be distinguished in the history of national cinematography: Soviet and post-Soviet, associated with the country gaining independence. The first private cinemas started operating in the town of Verny (Almaty) in 1910. In the early 20<sup>th</sup> century, there were only 13 film installations in Kazakhstan. The first professional filming of chronicle and documentary strands and films was done in Kazakhstan in the 1920's by filmmakers from Russia. The first documentary film shot in the country was "The Fifth Anniversary of the Kazakh USSR". In 1929, in Alma-Ata, the Production Office of the Vostokkino (*rus. Eastern Cinema*) Trust under the Council of People's Commissars of the RSFSR began operating with a laboratory, editing room, animation shop and inscription filming shop (closed in 1931)<sup>1</sup>. In 1934, the Alma-Ata Newsreel Studio was set up within the Vostokkino Trust that launched regular production of the Soviet Kazakhstan Newsreel, and later essay films. In 1939, the studio shot the "Amangeldy" feature film that was recognized as the "firstborn of the Kazakh feature cinema", since a national hero became a movie's main character for the first time<sup>2</sup>.

The beginning of the formation of Kazakhstan's national cinema falls during the 2<sup>nd</sup> World War. In 1941, the Feature Film Studio was established in Alma-Ata; in November, 1941 it merged with the Mosfilm (*rus. Moscow Film Studio*) and Lenfilm (*rus. Leningrad Film Studio*) which were evacuated to Kazakhstan, forming the Central Unified Film Studio (CUFS) that produced 80% of all Soviet films during the war. In the same year, VGIK – the All-Union State Institute of Cinematography – and the All-Union Script Studio also moved to Alma-Ata. In total, about 3,000 filmmakers arrived in Alma-Ata many of whom remained in the capital of Kazakhstan after the war<sup>3</sup>. In 1954, local director (ethnic Kazakh) Shaken Aimanov shot the first feature film "The Poem of Love". In 1960, the Alma-Ata Feature and Chronicle Film Studio was renamed the Kazakhfilm (*rus. Kazakhstan Film Studio*). The 60's and 70's became the heyday of Kazakh

<sup>1</sup> Film Encyclopedia of Kazakhstan, Almaty, 2010, p. 11.

<sup>2</sup> "Assessment of the state of the film industry and relevant legislation in Kazakhstan" by Gulnara Abikeyeva. UNESCO Project "Strengthening the film industries in Central Asia", 2020.

<sup>3</sup> Film Encyclopedia of Kazakhstan, Almaty, 2010, p. 14.

cinematography<sup>4</sup>. This period is associated with the works of the four classic directors of the Kazakh cinema, namely S. Aimanov, M. Begalin, A. Karsakbayev, and S. Khodzhikov. By 1979, 13,733 film installations were operating across the republic. From 1956 till the late 1970's, 400 cinemas were built nationwide<sup>5</sup>.

By the mid-1980's, the Kazakhfilm Studio produced 8 full-length and 4 short feature films, 5 cartoons, 1 full-length and 50 short documentaries annually, and dubbed 70–80 feature films into Kazakh<sup>6</sup>. In the late 80's, the “Kazakh new wave” emerged stimulating the evolvement of independent cinema; and ideological control and censorship vanished<sup>7</sup>. After gaining independence, since 2000, new wave philosophy and style have given way to production cinema focusing on mass audiences.

In the early 1990's, 28 private film studios were operating in Kazakhstan. The Katarsis Studio was the pioneer and leader, and produced about 70 full-length feature films<sup>8</sup> during 1989–1996. In 1993, the T. Zhurgenov Theater and Film Institute was established based at the Alma-Ata State Theater and Art Institute. By 1995, 2,320 film installations were operating in the Republic of Kazakhstan, including 356 cinemas and 21 specialized children's cinemas<sup>9</sup>. In 1996, the Sh. Aimanov Kazakhfilm Studio was reorganized and split into Sh. Aimanov Kazakh Film Factory (facilities and resources) and the National Production Center of the Republic of Kazakhstan (creative processes managed by independent production studios). In the 90's, filmmaking in the country slowed down. For instance, 11 full-length films were shot in 1993, 4 in 1994, 3 in 1995, 7 in 1996, 3 in 1997, 5 in 1998, and 1 in 1999<sup>10</sup>. It should be noted that many of them became nominees and prize-winners of international film festivals<sup>11</sup>. On March 28, 2000, all state film organizations (Sh. Aimanov Kazakh Film Factory, National Production Center of the Republic of Kazakhstan, Kazkinoprokat (*rus. Kazakhstan Film Distribution*) and Gosfilmofond (*rus. State Film Fund*)) were reorganized by merging into the Republican State Budget Enterprise (RGBE) Sh. Aimanov Kazakhfilm National Company.

In the course of 2000–2001, due to the collapse of the Soviet film distribution system, the inability of private studios to repay loans awarded for film production, lack of film distribution and the simultaneous slowdown of film production by the Kazakhfilm National Company, only 3 full-length feature films (“The Three Brothers” by S. Aprymov, 2000; “Zhylama!” by A. Karakulov, 2001; and “Zhol” by D. Omirbayev, 2001) were created. The production of two of them was funded by Western producers and donor organizations<sup>12</sup>. During 2002–2020, the Kazakhfilm Studio produced 477 films, including 120 full-length, 210 non-fiction, 84 short, and 63 animated<sup>13</sup>. The official statistics on the total number of films produced in the country during the period are unavailable. Every year, the films produced in Kazakhstan participate in A-class film festivals, and some are awarded prizes. In 2018, at the Cannes International Film Festival, Kazakh actress Samal Yeslyamova received the Cannes Palm Branch for Best Actress becoming the first CIS actress in the history of the Festival to receive this award. On January 3, 2019, the Law of the Republic of Kazakhstan *On Cinematography* was adopted. Also, in 2019, the State National Centre for Cinema Support (SNCCS) started operating.

<sup>4</sup> *Idem*, p. 15.

<sup>5</sup> *Idem*, p. 449.

<sup>6</sup> *Idem*, p. 449. The quantity of film releases was planned by the USSR Goskino (*rus. State Cinema*) Agency that also approved the thematic plan, scripts and final versions of all films.

<sup>7</sup> *Idem*, p. 17.

<sup>8</sup> Cinema of Kazakhstan. Kazakhfilm JSC, 1998.

<sup>9</sup> Film Encyclopedia of Kazakhstan, Almaty, 2010, p. 449.

<sup>10</sup> Cinema of Central Asia (1990–2001), Almaty, 2001, p. 259.

<sup>11</sup> *Idem*, p. 258.

<sup>12</sup> “Assessment of the state of the film industry and relevant legislation in Kazakhstan” by Gulnara Abikeyeva. UNESCO Project “Strengthening the film industries in Central Asia”, 2020.

<sup>13</sup> Information presented by Sh. Aimanov Kazakhfilm Studio JSC on request.

## 1.2. Brief review of national film industry related legislation

Prior to the adoption of the aforementioned Law of the RK *On Cinematography* of January 3, 2019, during the period of independent Kazakhstan, all strategic issues related to the development of the film industry were made by the Ministry of Culture and Sports of the RK with the Kazakhfilm Studio as the single state film industry regulator, including the distribution of funding for film production.

Until 2019, domestic filmmaking was regulated by the *Law on Culture* that stipulated for the definition of “domestic film”, who can produce such films, etc. Everything related to motion picture scripts was regulated by the national copyright law of the Republic of Kazakhstan. Copyright in the RK is regulated by the Constitution, Section 5 of the Civil Code of the RK (Intellectual Property Law), Law of the RK № 6–I *On Copyright and Related Rights* of June 10, 1996, norms of the World (Geneva) Copyright Convention of September 6, 1942 (in 1992, Kazakhstan recognized it as legal succession of international obligations and treaties of the former USSR), Geneva Provisions (World Intellectual Property Organization (WIPO) Performances and Phonograms Treaty) of December 20, 1996 (Kazakhstan acceded to the Treaty as per Laws № 545 and № 546 of April 16, 2004), as well as a number of other national statutory instruments. Kazakhstan also has the Association for the Protection of Copyright and Related Rights, where any author can register his/her screenplay. Until 2019, the top-tier Law of the Republic of Kazakhstan № 6–I *On Copyright and Related Rights* of June 10, 1996 was the only document registering film productions only at the script level. Other regulatory acts still valid to this day include Order № 109 *On the Approval of Rules for Recognizing a Film National* by acting Minister of Culture of the RK of October 5, 2010; Enactment of the Government of the RK № 1391 *On Approval of Rules for Issuing Film Distribution Certificate* of December 21, 2010; and Enactment of the Government of the RK № 1217 *On Approval of Requirements for Information on Film Index* of October 28, 2011.

Several statutes deal with language issues related to film distribution. Since January 1, 2012, except for films relayed from foreign television channels, all films imported into Kazakhstan's territory for distribution purposes shall be dubbed in the Kazakh language (as per Law № 280-IV *On Amendments and Additions to the Law of the Republic of Kazakhstan “On Culture”* of May 27, 2010).

The President of Kazakhstan signed the *Law on Cinematography* on January 3, 2019. The law stipulated the establishing of the SNCCS, currently the main regulator of the state budget allocated for film industry development. The law also refers to an authorized body vested with the main functions and competencies for ensuring the development of the country's film industry<sup>14</sup>, yet its title is not provided. As per the law, the SNCCS is the single operator channelling state financial support; the Center is also responsible for subsidizing foreign film producers (up to 30%) for goods, works and service costs in Kazakhstan. Yet, this article also requires clarification, since the sources, conditions and mechanisms of the subsidy are not stipulated. Likewise, the Law lacks a clause on film commissions, an integral component of the subsidy chain usually part of the Association of Film Commissioners International (AFCI). The Law prescribes the rules for film distribution and screening<sup>15</sup>, including the requirements for obtaining distribution certificates; as well as film age classification and screening requirements<sup>16</sup> in cinemas and on television. The Law also gives a general classification of film categories eligible

<sup>14</sup> Law of the RK *On Cinematography* of January 3, 2019, Clause 14 of Art. 1; Art. 5.

<sup>15</sup> *Idem*, Art. 7, Art. 8, Art. 9, and Art. 11.

<sup>16</sup> *Idem*, Art. 8.

for state support<sup>17</sup> without detailing the actual criteria for assigning a film to one of the listed categories. A consultative and advisory body – Interdepartmental Commission on State Financial Support for National Films – was established under the Government of the RK to formulate proposals and recommendations on issues of state financial support for national films. The Commission likewise partakes in determining the list of films receiving state funding. Mandatory dubbing/subtitling/voice-over translation into Kazakh<sup>18,19</sup> for all released films with the exception of limited release films<sup>20</sup>, as well as mandatory introduction of a Unified Automated Information System (UAIS) is also legally prescribed; yet, the procedure for the latter is not indicated.

Kazakh filmmakers are exempt of CPN (corporate income tax)<sup>21</sup>. If a founder of a company residing in the Republic of Kazakhstan registers a film in Kazakhstan, and the majority of its founders are Kazakhstan's residents, then CPN (20%) is not paid if the annual income of an individual entrepreneur does not exceed USD 319,450, and PIT (personal income tax) in the amount of 3% is not paid either, since it was abolished until January 01, 2023. Another legislative innovation is the exemption of small and medium-sized businesses from paying ST (social tax) and SLT (single land tax) starting January 01, 2019 for a period of 3 years.

### 1.3. Key film industry organizations, principles of their operation and interaction. Film fora

**1) State National Cinema Support Center non-profit JSC (SNCCS)** was established as per Enactment of the Government of the RK 113 of March 15, 2019 for the practical implementation of the Law of the RK *On Cinematography*<sup>22</sup>. The SNCCS is also called the Kazakh Cinema. The SNCCS is the sole regulator of public funds allocated for cinematography development, including film production. The SNCCS is managed by its Board and has an Expert Council operating under its auspices approved by the Ministry of Culture and Sports of the RK and elected for 3 years. The Council participates in selecting projects for funding.

Main SNCCS activities:

- Film financing. Development of national cinema and international co-production. Tool: open pitching. In 2019, KZT 7 bln (USD 18.2 mln as per 2019 weighted average exchange rate) was allocated for 14 approved full-length motion pictures, and in 2020 KZT 6 bln (USD 14.8 mln as per 2019 weighted average exchange rate) for 15 approved full-length motion pictures<sup>23</sup>;
- International promotion and cooperation. Tools: film festivals, film markets, fora;
- Investment mobilizing. Tool: subsidizing of foreign film projects through an up to 30% rebate (refund);
- National Film Commission. Organizational support of film projects;
- Film distribution. Implementation of the UAIS<sup>24</sup>. Local and international distribution of national films;
- Education. Advanced training of the cinematography cadre.

<sup>17</sup> *Idem*, Art. 12.

<sup>18</sup> *Idem*, Art. 11.

<sup>19</sup> *Idem*, Art. 9.

<sup>20</sup> [https://online.zakon.kz/Document/?doc\\_id=39029378#pos=124;-58](https://online.zakon.kz/Document/?doc_id=39029378#pos=124;-58), Art. 9.

<sup>21</sup> Law of the Republic of Kazakhstan № 213-VI of January 3, 2019 amended and supplemented the Taxation Code of the RK on cinematography issues (Art. 293 of Chapter 29).

<sup>22</sup> <https://kazakhcinema.kz/ru/about/>

<sup>23</sup> About SNCCS activities, p. 14, ([https://kazakhcinema.kz/assets/files/2020/04/presentation2020\\_ru.pdf](https://kazakhcinema.kz/assets/files/2020/04/presentation2020_ru.pdf)).

<sup>24</sup> UAIS – open digital cinema ticket system making box office information open and accessible.

**2) Shaken Aimanov Kazakhfilm JSC**, the main domestic film studio. The SNCCS provides state technical support, procures equipment, etc.

**3) Private film studios.** Based on the number of pitching applications submitted to SNCCS, today about 100–120 private film companies and film studios operate in Kazakhstan<sup>25</sup>. The 2019 official statistics on the entities producing films identified a lower number, i.e. 64 companies<sup>26</sup>. Based on the Broadway film portal, 84 companies associated with the film industry currently operate in the country<sup>27</sup>.

#### 4) Public associations (PAs):

- **Union of Cinematographers of Kazakhstan** was established in 1963. As of January 1, 2018, the Union includes 300 members representing a variety of film professions<sup>28</sup>;
- **National Academy of Motion Picture Arts and Sciences** was founded in 2016, and as of January 1, 2021 has 99 members<sup>29</sup>. The Academy founded the annual Tulpar Award issued based on a secret ballot in the following categories: best film, best director, best screenplay, best actor, best actress, best photography, best production designer, best film music;
- **Kazakhstan Association of Film Critics** was established in 2015, and as of January 1, 2021 had 15 members<sup>30</sup>. Since 2015, the Association has been issuing the Choice of the Year Award in 12 permanent categories: best movie drama, best genre movie, best director, best screenplay, best male role, best female role, best male support role, best female support role, best composer, best song, best director of photography, best production designer (best debut and best short meter nominations are not permanent);
- **Independent Association of Kazakhstan Cinematographers** (until 2020, Association of Young Filmmakers of Kazakhstan) founded in 2014.

#### 5) Annual film festivals and fora:

- **Eurasia International Film Festival** was founded in 1998, and is held with the support of the Ministry of Culture and Sports of the RK; FIAPF accredited;
- **Almaty Film Festival** was founded in 2018, and is held with the support of Almaty City Akimat (*kaz. Mayor's Office*);
- **Bastau International Student Film Festival** was founded in 2011, and is held by Zhurgenov KazNAL;
- **Baikonur International Festival**, was first held in 2016 as a domestic short film festival.

#### 6) Cinemas and film networks

Kazakhstan publishes a large body of statistics on the various aspects of cinema and film network operation within the country. As per the 2019 data, the total number of cinemas in Kazakhstan amounted to 101<sup>31</sup>, including 72 indoor digital cinemas<sup>32</sup>, and 21 mobile film installations<sup>33</sup>.

<sup>25</sup> "Assessment of the state of the film industry and relevant legislation in Kazakhstan" by Gulnara Abikeyeva. UNESCO Project "Strengthening the film industries in Central Asia", 2020.

<sup>26</sup> Taldau Information and Analytical System of the Committee on Statistics of the Ministry of National Economy of the RK (<https://taldau.stat.gov.kz/ru/NewIndex/GetIndex/2971900?keyword>).

<sup>27</sup> <https://brod.kz/places/>

<sup>28</sup> <https://kinoger.kz/rus/sostav-soyuza.html>

<sup>29</sup> Information provided by the National Academy of Motion Picture Arts and Sciences on the date of the report.

<sup>30</sup> Information provided by the Association of Film Critics on the date of the report.

<sup>31</sup> Taldau Information and Analytical System of the Committee on Statistics of the Ministry of National Economy of the RK (<https://taldau.stat.gov.kz/ru/NewIndex/GetIndex/702575?regionId=741880&periodId=7>).

<sup>32</sup> *Idem*: <https://taldau.stat.gov.kz/ru/NewIndex/GetIndex/702576?keyword>

<sup>33</sup> *Idem*: <https://taldau.stat.gov.kz/ru/NewIndex/GetIndex/702585?keyword>

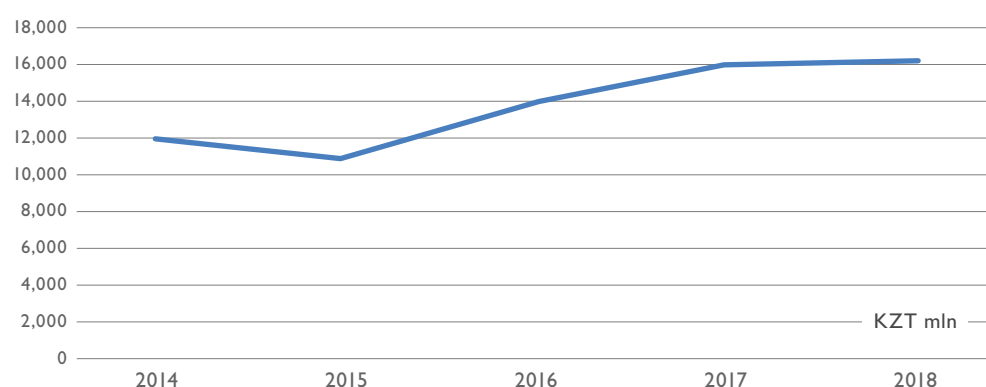
As of 2019, the number of stationary film installations amounted to 451<sup>34</sup>. Based on the official statistics, the quantity of cinemagoers has been growing from year to year, and in 2019 amounted to 19,880,485 persons<sup>35</sup>, with the total cinema seating number across the country amounting to 51,903<sup>36</sup>.

**Fig. 1. Largest cinema network operators in Kazakhstan (as of July 01, 2019)<sup>37</sup>**

Rank	Network operator	Q-ty of cinemas	Q-ty of cinema halls	Market share by q-ty of cinema halls	Headquarters
1	Kinopark	10	68	21.7%	Almaty
2	Chaplin Cinema	5	38	12.1%	Almaty
3–4	Kinoplexx	7	31	9.9%	Almaty
3–4	Arman	7	31	9.9%	Almaty
5	CineMax	2	17	5.4%	Almaty
6	Arsenal	6	15	4.8%	Almaty
7	Cinema Park	2	10	3.2%	Nur-Sultan
8	Sary Arka	3	7	2.2%	Karaganda
9	Astana Park	3	5	1.6%	Taraz
10	Illuzion	1	5	1.6%	Almaty
<b>Total for each operator</b>		<b>46</b>	<b>227</b>	<b>72.3%</b>	
<b>Total for Kazakhstan</b>		<b>91</b>	<b>338</b>	<b>100%</b>	

Currently, Kazakhstan has not introduced a UAIS allowing the collection of transparent data on film distribution market turnover. The system's purpose is to collect, register and process information on public film screenings in cinemas. All the available statistics are based on the data provided to relevant state authorities by the cinemas themselves. Thus, the income of film screening organizations in 2019 amounted to KZT 21,239,675.3 (USD 55 mln as per 2019 weighted average exchange rate)<sup>38</sup>. At the same time, the data collection study on Kazakhstan's film market executed in 2018–2019 by the Nevafilm Research Analytical Department demonstrated an upward distribution income trend in recent years<sup>39</sup>.

**Fig. 2. 2014–2018 upward trend in distribution income**



<sup>34</sup> Idem: <https://taldau.stat.gov.kz/ru/NewIndex/GetIndex/702584?keyword>

<sup>35</sup> Idem: <https://taldau.stat.gov.kz/ru/NewIndex/GetIndex/702589?keyword>

<sup>36</sup> Idem: <https://taldau.stat.gov.kz/ru/NewIndex/GetIndex/702581?keyword>

<sup>37</sup> Film market of Kazakhstan 2018–2019, by K. Leontyeva, P. Kuzmichev, S. Mudrova, pp. 4–5 ([https://research.nevafilm.ru/public/research/articles/2019\\_kaz\\_cinema\\_market\\_2018\\_19.pdf](https://research.nevafilm.ru/public/research/articles/2019_kaz_cinema_market_2018_19.pdf)).

<sup>38</sup> Agency for Strategic Planning and Reforms of the Bureau of National Statistics of the RK: <https://stat.gov.kz/official/industry/21/statistic/7>

<sup>39</sup> Idem, p. 2.

Stuntmen groups, leading in their field in the CAR countries and working internationally – namely Nomad Stunts LLP<sup>40</sup> (in 2020 they received the Taurus World Stunt Award, a prestigious annual international stunt award) and Leader Stuntmen Group PE<sup>41</sup> – deserve special mention.

In January 2021, Maslikhat (*kaz. City Parliament*) deputies supported the initiative of establishing a Public Utility Establishment *Department of Creative Industries of Almaty*. At the time of the study, the Prime Minister and Minister of Culture of the RK supported the development of the Creative Kazakhstan Concept that should formulate the strategy and state measures to support the development of the most promising creative industries, as well as assess the necessary changes in national legislation<sup>42</sup>.

#### 1.4. Institutional capacity, including existing specialized educational and training institutions, programmes and schools

Kazakhstan has 4 higher specialized educational institutions (universities):

**1) T. Zhurgenov Kazakh National Academy of Arts (KazNAI)**, Almaty, was established in 1955, and in 2001 – as per Decree of the President of the RK № 648 *On granting special status to certain state higher educational institutions* of July 5, 2001 – was awarded the special status and title of T.K. Zhurgenov Kazakh National Academy of Arts<sup>43</sup>. The Academy follows the three-tier bachelor-master-PhD training system, and has 6 schools (departments): 1) Performing Arts, 2) Cinema and TV, 3) Choreography, 4) Fine Arts, Sculpture, Design, 5) Art History, and 6) Musical Art (PhD).

**Fig. 3. KazNAI Cinema and TV School<sup>44</sup>**

Bachelor	Art Direction	Feature Film Directing; TV Directing; Animation Directing; Documentary Film Directing
	Camerawork	Cinema and TV Photography
	Art Management	Art Management, Production
	Audio Production	Audio Production
	Media Journalism	Media Journalism
Master	Art Direction	Cinema and TV Directing
	Audio/Visual Arts and Media Production	Cinema and TV Photography; Audio Production
PhD	Art Direction	Cinema and TV Directing

In 2019, 62 specialists graduated from the KazNAI's Cinema and TV School, including 38 females and 24 males; in 2020–65 specialists, including 31 females and 32 males<sup>45</sup>.

The Academy is involved in international and exchange educational programs, namely<sup>46</sup>:

- **Erasmus+**<sup>47</sup>. In 2015, K. Zhurgenov Kazakh National Academy of Arts won a grant (EUR 65,216) under the International Credit Mobility Project of the EU's Erasmus+ Programme, that allowed 22 persons (Academy faculty/students) – including 5 students

<sup>40</sup> <https://nomadstunts.com/en/>

<sup>41</sup> <http://leaderstunt.com>

<sup>42</sup> Information provided by Ernar Kurmashev, Creative Industries Team Leader.

<sup>43</sup> <https://kaznai.kz/история-казнаи/>

<sup>44</sup> <https://talapker.kaznai.kz>

<sup>45</sup> Information provided by KazNAI on the date of the report.

<sup>46</sup> <https://kaznai.kz/международные-и-обменные-образовате/>

<sup>47</sup> [https://ec.europa.eu/programmes/erasmus-plus/about\\_en](https://ec.europa.eu/programmes/erasmus-plus/about_en)

of the Cinema and TV School (1 female and 4 male) to study and complete internships at hosting European universities;

- **Mevlana**, student and faculty exchange (in specific areas) between T.K. Zhurgenov KazNAI and Turkish partner universities with partial financing on behalf of Turkey's Higher Education Council;
- **DAAD (German Academic Exchange Service)** is the largest organization in the world uniting Germany's higher education institutions and assisting in the international academic exchange of students and researchers.

As per the Academy's Strategic Plan for 2019–2020, 29 students with different majors planned to participate in the academic mobility program; due to the spread of the coronavirus infection (COVID-19), 25 students actually studied, with some of them continuing their studies via distance learning during the quarantine regime<sup>48</sup>.

The Academy has 81 active agreements with foreign partner universities, including 31 aimed at external and internal academic mobility<sup>49</sup>.

**2) Kazakh National University of Arts (KazNUI)**, Nur-Sultan. In 2009, the Kazakh National Academy of Music was renamed KazNUI and established the School of Theater, Cinema and Television providing bachelor- and master-level education. Altogether, KazNUI has 6 (six) schools: 1) Vocal-Choral, Pop Art and Musical Education, 2) Cinema and Television, 3) Music Studies and Piano, 3) Orchestra Performance, 4) Theater Art and Art History, 5) Traditional Music Arts, 6) General Art, as well as the Department of Social and Humanitarian Disciplines and Art Management<sup>50</sup>.

**Fig. 4. Cinema majors at KazNUI's Cinema and TV School**

Bachelor	Directing, Art Management	<ul style="list-style-type: none"> <li>• Directing, Film and TV Producing</li> <li>• Drama Theater Directing</li> <li>• Feature Film Directing</li> <li>• TV Directing</li> <li>• Animation Directing</li> <li>• Non-Fiction Cinema Directing</li> <li>• Puppet Theater Directing</li> <li>• Musical Sound Engineering</li> <li>• Film and TV Sound Engineering</li> <li>• Art Management</li> </ul>
	Art Criticism	<ul style="list-style-type: none"> <li>• Study of the Film</li> <li>• Cinema and TV Drama Art</li> </ul>
	Performance Arts	<ul style="list-style-type: none"> <li>• Drama Theater and Cinema Actor</li> </ul>
	Audio and Visual Means and Media Production	<ul style="list-style-type: none"> <li>• Cinematography</li> </ul>
	Graphic Arts	<ul style="list-style-type: none"> <li>• Scenography: Theater, Cinema and TV Costume Scenography</li> <li>• Scenography: Lighting</li> <li>• Scenography: Theater, Cinema and TV Makeup</li> <li>• Cinema and TV Artist</li> </ul>
Master		<ul style="list-style-type: none"> <li>• Drama Theater and Film Actor</li> <li>• Study of the Film</li> <li>• Screenwriting in Cinema and TV</li> <li>• Cinematography</li> <li>• Feature Film Directing</li> <li>• Directing, Cinema and TV Producing</li> <li>• Scenography of Theater, Cinema and TV Makeup</li> <li>• Scenography: Theater, Cinema and TV Costume Scenography</li> <li>• Scenography: Clothing Design</li> </ul>

<sup>48</sup> Information provided by KazNAI.

<sup>49</sup> <https://kaznai.kz/зарубежные-вузы-партнёры-академии/>

<sup>50</sup> <https://kaznui.kz/department-ru/>

On average, 40–50 specialists graduate from the University's Cinema and TV School per year. KazNUI also actively works on external academic mobility within the framework of various educational programmes with EU countries. Official data was requested for this study, but was denied.

3) **Turan University Academy of Cinema and Television (ACT)**, Almaty. Turan University was established and registered in 1992, and provides training for 24 undergraduate, 15 master's, and 5 PhD majors, as well as having 3 cinema-related educational programs:

**Fig. 5. Cinema-related majors at the Academy of Cinema and Television (Turan University)**

Bachelor	<ul style="list-style-type: none"> <li>• Directing</li> <li>• Cinematography</li> <li>• Acting</li> </ul>
Master	<ul style="list-style-type: none"> <li>• Directing</li> <li>• Cinematography</li> </ul>

In 2019, 31 specialists, including 8 female and 24 male, graduated from the Academy of Cinema and Television; in 2020–29 specialists, including 6 females and 23 males did so<sup>51</sup>.

Academic mobility is ensured via the following programmes<sup>52</sup>:

- Travel grant of the Ministry of Education and Science of the RK. In 2018–2020, 2 students (female) received at grant to study at Siauliai University in Lithuania;
- Erasmus+;
- Mevlana Intergovernmental Programme.

4) **M. Auezov Southern Kazakhstan State University** is one of the largest multi-disciplinary universities in Kazakhstan. Its Culture and Sports Department provides education under the “Directing” major (BA/MA degrees). Last year, the university took 3<sup>rd</sup> place in the national ratings and 3<sup>rd</sup> place in the number of grants awarded<sup>53</sup>.

In 2019, 17 directing specialists graduated from the university, including 6 females and 11 males; in 2020 – 16 specialists, including 6 females and 10 males did so<sup>54</sup>.

In 2018–2021, 2 students majoring in directing took part in academic mobility programs.

Kazakhstan also has about 30 private film schools and courses for adults and children. Their list varies from year to year, and no official registration and training quality control is done.

## 1.5. Gender considerations based on available data

This part of the study does not contain any official statistics on how many men and women are engaged in a particular film industry profession. In general, there are extremely few female directors, screenplay writers, operators, production artists, composers and sound engineers in

<sup>51</sup> Information provided by Turan University.

<sup>52</sup> <https://turan-edu.kz/академическая-мобильность-обучающи/>

<sup>53</sup> <https://www.ukgu.kz/ru/istoriya>

<sup>54</sup> Information provided by M. Auezov Southern Kazakhstan State University.

Kazakhstan's motion picture sector. Yet, the number of female producers in the country's film industry has been growing<sup>55</sup>.

## 1.6. Main challenges, issues and significant gaps impeding film industry development

### SNCCS

- Independence is the key prerequisite for the Center's effective operation. It can be achieved either by removing it from the structure of the Ministry of Culture and Sports of the RK reporting to the Cabinet of Ministers (Goskino model), or by ensuring its full accountability to the Ministry of Culture and Sports of the RK, but with full legal and financial autonomy in decision making within its budget (agency model of France's National Centre for Cinematography and Animation, CNC);
- Project pitching: a clear ranking by state-allocated budgets depending on the genre, production difficulties, actor and director composition is lacking. There is a need to conduct several pitchings per year, divide them into phases (screenplay development, production, post-production, promotion and distribution) and by various areas (documentary, animated, etc.);
- An expert council should decide on film financing and support amounts based on open and public project review procedures and thoroughly designed evaluation criteria, which would allow the exclusion of subjective factors. In the current version of the law, the expert council is only vested with an advisory function<sup>56</sup>;
- Funding of the allocation scheme is rather complicated. It could be decoupled by type of films, since not all projects require 100% funding. This can lead to a potential revision of the requirement under which all projects should return only 20% of the allocated money to the SNCCS;
- State support lacks financing for film project development, without which it is impossible to create a strong screenplay foundation for domestic cinematography, as well as support theoretical, scientific and technical research in the field;
- In addition to the newly established National Film Commission, to ensure its proper and effective operation it is necessary to establish regional-level commissions;
- Absence of a state grant system for public associations for key film-related professions (producers, screenwriters, directors, operators, etc.), as well as the lack of active involvement of middle-age and young film professionals in their activities;
- There is a need to create a single database of film studios and companies in Kazakhstan;
- Specialized education is of poor quality, and the film industry is facing a lack of a professional cadre. A particularly urgent need is associated with producers, screenwriters, and secondary filmmaking specialists. Educational exchange programmes are not regular. In this regard, it seems appropriate launching the aforementioned majors in the listed universities of Kazakhstan, as well as holding master classes and sending students to study at VGIK, Russian State Institute of Stage Arts (RGSI) and non-CIS countries;

<sup>55</sup> "Assessment of the state of the film industry and relevant legislation in Kazakhstan" by Gulnara Abikeyeva. UNESCO Project "Strengthening the film industries in Central Asia", 2020.

<sup>56</sup> [https://forbes.kz//life/view/ne\\_parada\\_radi\\_1583225077/](https://forbes.kz//life/view/ne_parada_radi_1583225077/)

- Due to the lack of producer training, there is a need to launch Cinema and TV Production majors at economic universities training business specialists. At the moment, most Kazakh producers do not speak English and possess no skills for submitting applications to international film funds.

### Film distribution

- There is a need to introduce a UAIS to combat possible concealment of distribution income;
- Insufficient presence of film networks (circuits) at regional and district levels requires the launch of a program to expand film networks. Other relevant issues include: creating art-house cinemas in large cities and state-supported cinema networks in small towns; creating mobile cinemas to show Kazakh movies and commercial motion picture in auls (villages).

### Law on cinema

- There is a growing need to update the legal framework to reflect new realities. Many legal instruments regulating and/or related to the film industry were adopted in the late 90's and mid-2000's. Taking into account the objectives of the Convention on the Protection and Promotion of the Diversity of Cultural Expressions<sup>57</sup> (2005), in order to integrate into the world cultural and creative industry, including the world film industry, it is necessary to acknowledge contemporary challenges and solutions. The Law of the RK *On Cinematography* should be supplemented and amended accordingly.

### Statistics

- Today, virtually no sociological and marketing studies are conducted in Kazakhstan to answer the questions: what the audience prefer, what characters are in demand, what is the gender, language, age ratio, etc. This prevents the forging of a social order for film production. The most competent studies of Kazakhstan's film industry were conducted by the Russian Nevafilm Research Company.

### Trade unions, guilds, etc.

- Practically no civic initiatives and associations are present in the filmmaking sphere. There are no guilds of actors, directors, screenwriters, producers or distributors. There is an obvious need for trade union organizations which would lobby for the interests of filmmakers before the state, would be mandated to propose amendments to the Law on Cinematography, as well as establish ties with international film funds, etc.;
- Possibility of legislative engagement – along with the SNCCS – of public associations (e.g. Union of Cinematographers of Kazakhstan, National Academy of Motion Picture Arts and Sciences) and trade union organizations in determining the directions for film industry development, formulating its strategy, participating in the formation and membership of an expert council. The issue of their participation in educational initiatives, in advanced personnel training, and research projects;
  - Insufficient technical and technological development of the film industry.
  - More attention should be paid to international networking and collaborations.

<sup>57</sup> [https://www.un.org/ru/documents/decl\\_conv/conventions/cultural\\_expression.shtml](https://www.un.org/ru/documents/decl_conv/conventions/cultural_expression.shtml)

## Gender policy in cinematography

- No systemic efforts are taken to ensure gender equality in the film industry. Today, if not acting as female leads, women occupy more assistant positions overall in the sector. Creative positions, such as directing, camera work, production design, composing, etc. are mostly occupied by men. Thus, there is a need to establish special grants to support and promote women filmmakers, as well as create conditions to allow women to enhance their filmmaking qualifications.
- The issue of preserving the films of the Soviet era and the first films of the independence era requires attention;
- Development of documentary and animated films also requires additional attention.

## 02. OVERVIEW OF THE STATE OF THE FILM INDUSTRY IN THE KYRGYZ REPUBLIC



Shooting of the movie "Lake". © "OYMO" Studio

### 2.1. Brief historical survey of the film industry and its development

In the early 20<sup>th</sup> century, specifically in 1911–1914 the first cinemas opened in the town of Pishpek (currently, Bishkek). By 1920, cinemas were operating in almost all the towns/cities of Kyrgyzstan, and mobile movie installations operated in almost all settlements. From 1925, they started shooting the first serious scientific-documentary, documentary-production and motion pictures. In 1937, in the city of Frunze (currently, Bishkek) a permanent correspondent office of the Tashkent Branch of Soyuzkinochronika (*rus. Union Newsfilms*) Studio was established; this event marked one of the key milestones in the history of Kyrgyz filmmaking.

Both full-length films (1–2 per year) and news and reporting reels of those years were produced on a regular basis. In 1938, the first widescreen cinema opened in Frunze. By 1940, their number grew to 20 film installations.

On November 17, 1941, the Council of People's Commissars of the Kyrgyz SSR issued a decree on setting up the Kinochronika (*rus. Newsfilm*) Studio in the city of Frunze. This day is officially considered the birthday of Kyrgyz cinema. Since 1941, the Studio had been constantly dubbing Soviet films into the Kyrgyz language and releasing them for republic-wide screening.

In 1945, the Studio started independently producing its first full-length documentary and fiction films. New widescreen cinemas were opening both in Frunze and in other cities throughout the republic.

From that time on, the development of cadre and technical capacities went full-scale, including the emergence of a distribution system and local film school for both documentary and feature filmmaking, that subsequently led to the high noon of Kyrgyz cinematography in the 60's.

In 1960, the Cinema House started operating in Frunze<sup>58</sup>. In 1961, the Kinochronika Studio Frunze was renamed the Kyrgyzfilm, and in the same year the first film adaptation of a piece

<sup>58</sup> Creative Club of Film Artists.

by Chyngyz Aitmatov<sup>59</sup> took place. In 1962, the Union of Cinematographers of Kyrgyzstan was created.

For 50 years (during 1941–1991), Kyrgyz cinematography functioned as part of the Soviet film industry. Thanks to Soviet ideology, centralized state administration, systemic education policy, industrialization, subsidized in-situ upgrading of technical and personnel resources, it was during these years that the Kyrgyz cinema, both artistic and documentary, experienced its heyday (the so-called “Kyrgyz miracle”) – 1960–70’s – and even reached world screens. Chyngyz Aitmatov, who headed the Union of Cinematographers of Kyrgyzstan from 1965 to 1986, undoubtedly played a huge role in the formation of Kyrgyz filmmaking. The most famous pictures of the “Kyrgyz miracle” regularly became participants of official programs and were awarded prizes, diplomas and Grand Prix at the most significant film festivals around the world. The Kyrgyz documentary of those years became an outstanding phenomenon that attracted the attention of filmmakers around the world, thanks to which the term the “Kyrgyz school of documentary cinematography” appeared in film studies. Since 1964, the works of Kyrgyz documentary filmmakers have received many diplomas and prizes at various all-Union and international film festivals globally.

Modern cinemas opened throughout the country and in the capital, and the existing ones underwent regular upgrade. Various thematic all-union film festivals were held on a regular basis. In 1982, 63 film installations and 15 cinemas operated in Kyrgyzstan.

After the Kyrgyz Republic gained independence in 1991, as did the entire socio-economic system domestic filmmaking faced the difficulties of transiting to a market economy. State film production fell into crisis for several years. The young independent republic did not have the means to support cinematography at the state level. In the early 1990’s, the state film studio shot only 2–3 films a year. Yet, in the crisis 90’s, despite the difficulties, the middle-aged generation of directors continued the traditions of the “Kyrgyz miracle” and still participated in A-class world film festivals. In the course of that hard economic period, the first private studios opened and, jointly with foreign colleagues – both from Europe and neighboring states – produced their first pictures. The movies by the directors who came after the middle-aged cohort (the so-called “new wave” directors) likewise became participants of official programs and won awards and Grand Prix at the best world film festivals in Cannes, Berlin, Locarno, Tokyo, Karlovy Vary, etc.

On October 2, 2001, thanks to the huge effort by the Union of Cinematographers of Kyrgyzstan, leadership of the Goskinovideoprokat (*rus. State Film and Video Distribution*) of the Kyrgyz Republic, and the so-called “magnificent seven” – that included almost all famous Kyrgyz mid-generation directors and art managers – Kyrgyzstan’s Parliament adopted the *Law on State Support for Cinematography*, and filmmaking entered the register of the most significant industries of Kyrgyzstan<sup>60</sup>. In 2002, the Kyrgyzfilm Film Studio was named after the outstanding Kyrgyz director Tolomush Okeyev. In the same period – during 2000–2010 – old cinemas restored and upgraded by private tenants once again opened their doors to the public, and the independent republic held its first international film fora and film festivals.

The first commercial motion pictures appeared; the demand for national cinema grew among the audience; and the domestic viewer emerged. In 2014, the Union of Cinematographers of Kyrgyzstan established the guild of producers as a designated body for addressing the most burning issues of film production and distribution.

In 2016, the Cinematography Department started implementing a program aimed at supporting domestic filmmaking and subsidizing domestically produced films on a competitive basis. For the first time, any studio could take part in the competition, regardless of ownership.

<sup>59</sup> Kyrgyz writer, screenwriter, diplomat, academician. People’s Writer of Kyrgyzstan and Kazakhstan, winner of numerous international awards.

<sup>60</sup> The Law on State Support for Cinematography (<http://cbd.minjust.gov.kg/act/view/ru-ru/919?cl=ru-ru>).

From 2001 to 2018, over 130 films were created in Kyrgyzstan. On average, 20–30 full-length films were shot in the country every year during that time. 36 state cinemas, including 10 under long-term lease, were operating across the nation<sup>61</sup>.

## 2.2. Brief review of national film industry related legislation

The legislation governing cinematography in the Kyrgyz Republic includes the *Law on State Support for Cinematography of the KR*<sup>62</sup> and the *Statutes of the Cinematography Department*<sup>63</sup>.

1) **The Law on State Support for Cinematography of the KR № 164 of October 2, 2001** is based on the Constitution of the KR, current legislation, other laws and statutory instruments of Kyrgyzstan, as well as international treaties that went into effect as per the legally established procedure and to which the Kyrgyz Republic is a party. According to the law "... as an integral part of culture and art, cinematography of the Kyrgyz Republic shall be preserved and developed with the support of the state".

The principles of state cinematography policy (Art. 1 of the Law) include the following:

- The State shall ensure the preservation and development of cinematography as an integral part of the culture and art of the Kyrgyz Republic;
- The State shall be responsible for preserving and developing cinematography as a single system, including production, distribution and screening of films and video films;
- A national-level executive authority in the field of cinematography shall manage all state film- and video-production, film- and video-distribution, film- and video entertainment enterprises and organizations located within the territory of the KR, including these transferred to communal (municipal) ownership;
- Cinematography shall be recognized as a field of culture and art with constant development of its creative, educational, production, technical, scientific and information base as a prerequisite for its existence;
- Ensuring preservation of the national film fund representing historical, cultural, and artistic value;
- Exercise of citizens' rights and freedoms in the creation and use of cinematic art;
- Creating conditions for the population to have access to cinematography.

The Law stipulates for the definitions of the main cinema concepts (Art. 3), defines the concept of national film (Art. 4), as well as stipulates for the freedom of creativity in cinematography (Art. 5), including prohibition of censorship of audiovisual works except in cases of inadmissible abuse of the freedom of creativity. The Law likewise contains a provision on the procedure for classifying audiovisual works as pornographic and other prohibited types of outputs of creative activity approved by the Government of the KR (Art. 6). The Law also defines the concept of the National-level (Republican) executive authority mandated to provide state support for cinematography (Art. 7) and lists the main directions of its activity, including: drafting of laws and regulations in the field of cinematography; maintenance of the State Film Register and issuance of distribution certificates; development of a state statistical and reporting system in the field of cinematography; development of international relations in the field of cinematography, etc.

<sup>61</sup> "Assessment of the state of the film industry and relevant legislation in Kyrgyzstan" by Erke Dzhumakmatova. UNESCO Project "Strengthening the film industries in Central Asia", 2020.

<sup>62</sup> The Law on State Support for Cinematography (<http://cbd.minjust.gov.kg/act/view/ru-ru/919?cl=ru-ru>).

<sup>63</sup> Enactment on the Cinematography Department (<http://cbd.minjust.gov.kg/act/view/ru-ru/95380>).

The Law stipulates for the requirements and procedures for state financing of cinematography, which should be at least 0.1% of the national budget for the corresponding financial year (Art. 9). Thus, during 2015–2019 the total planned amount of state funding for cinematography – 0.1% of the national budget – amounted to KGS 685,763,400 (USD 10,212,427); yet, over those 5 years only KGS 261,030,200 (USD 3,875,718) was actually allocated<sup>64</sup>. The Law defines the financing amount for the production of a national film (Art. 10), its distribution (Art. 11) and participation in international film festivals (Art. 12). Public financing for the production of a national film shall be provided in the amount of not less than 51% of the estimated production costs, or up to 100% in exceptional cases (Art. 10). The Law also determines the principles of storing the initial materials of national films and film chronicles (Art. 13). The Law's final provisions stipulate the conditions for the privatization of cinematographic organizations (Art. 14) and corresponding limiting conditions (Art. 15).

**2) Enactment of the Government of the Kyrgyz Republic № 24116 of April 16, 2012** approved the Statutes of the Cinematography Department under the Ministry of Culture, Information and Tourism of the KR.

The Statutes define the Department's aims and objectives on preserving, developing and promoting domestic cinematography, including improving its management and ensuring the conditions fostering its overall development; as well as the Department's management structure and the list of cinemas under its supervision.

In 2015, the Government of the KR adopted the *Program for Development of Cultural Sphere until 2020*<sup>65</sup> describing the current situation, business and cultural environment. The Program formulated a development vision and goals, strategic guidelines, as well as all potential indicators for assessing the progress of its implementation, monitoring and evaluating its outcomes and outputs.

In particular, the Program stated that the cultural sector still lacked certain strategic documents, laws and law enforcement acts allowing a favorable environment and practical mechanisms for the advancement of the cultural sphere in general and the film industry in particular; that suitable conditions for attracting non-state resources and promoting philanthropy among the business community had not been created yet; and that potential grant resources were poorly mobilized.

There is no information on the volume of investment and capital construction in the field of culture at the national and local self-government levels, on the cultural sphere financing by local authorities, commercial and international humanitarian agencies. The indicators and data collection systems characterizing the state of the cultural sector, structure and dynamics of the corresponding population needs, efficiency and effectiveness of cultural institutions are not objective or are not measured at all.

No analysis of the international obligations of the Kyrgyz Government in the field of culture and no qualitative assessment of the benefits derived from international agreements is done, preventing proper international cultural cooperation.

The Program likewise stated that in recent years professional art had mainly developed thanks to the efforts by the representatives of the art sector and creative groups themselves, and that the current financing system of the cultural sector did not satisfy the goals and objectives of its modern development<sup>66</sup>.

<sup>64</sup> "Assessment of the state of the film industry and relevant legislation in Kyrgyzstan" by Erke Dzhumakmatova. UNESCO Project "Strengthening the film industries in Central Asia", 2020.

<sup>65</sup> Cultural Sphere Development Program (<http://cbd.minjust.gov.kg/act/view/ru-ru/98149>).

<sup>66</sup> *Idem*.

## 2.3. Key film industry organizations, principles of their operation and interaction. Film fora

As per Art. 7 of the *Law on State Support for Cinematography of the KR*, the national government assigns the authority to carry out such support for cinematography to the national-level executive body in the field of cinematography – Cinematography Department under the Ministry of Culture, Information and Tourism of the Kyrgyz Republic and its subordinate organizations.

The Department's<sup>67</sup> management architecture includes: T. Okeyev Kyrgyzfilm National Film Studio, Kyrgyzfilmfond National State Film Fund, C. Aitmatov Cinema Center Directorate, film directorates and cinemas.

### 1) Cinematography Department

The main tasks and functions of the Department are the following: industry policymaking, regulation, coordination, control, accounting and support, including drafting laws and other regulations in the field of cinematography; development and implementation of state programs associated with the preservation and development of cinematography; participation in the development of the national budget in terms of cinematography expenditure; coordination of the development of cinematography infrastructure; maintenance of the State Film Register, issuance of distribution certificates with the aim of regulating film distribution and screening in the territory of the country (Statutes, Clauses 9, 10).

To fulfill its functions, the Department is mandated to independently resolve organizational, creative and production, economic and financial issues, as well as other matters in the field of cinematography; raise funds from international organizations and grants; represent in public administration bodies its own interests and the interests of its subordinate institutions and organizations; register, open and operate cinemas, establish coordinating and advisory bodies (councils, commissions, groups); approve all types of cost estimates covered from the national budget and by subordinate institutions and organizations for film production and dubbing, strengthening the material and technical base; allocate means for development and material promotion, as well as social support of the Department and subordinate institutions and organizations at the expense of special funds; as per legally established procedures cooperate with other legal entities and individuals, organizations and enterprises; exercise other rights not contradicting the legislation of the Kyrgyz Republic (Statutes, Clause 11).

Financing of the activities of the Department and its subordinate institutions and organizations is carried out with grants from the national budget; income derived from the sale of products, works and services, as well as from other activities of the Cinematography Department; donations and charitable contributions by enterprises, organizations, citizens, including foreign countries; and other sources not prohibited by Kyrgyzstan's law (Statutes, Clauses 6, 19).

Since 2016, in accordance with the *Regulations on Expert Commission of the Cinematography Department under the Ministry of Culture, Information and Tourism of the KR*<sup>68</sup> the Cinematography Department has been administering a project contest, in which any studio can take part regardless of the form of incorporation<sup>69</sup>. The contest has proved its effectiveness and is perceived positively by the majority of domestic filmmakers. Its disadvantages include the small annual budget – not more than KGS 10 mln (in 2017, it amounted to approx. KGS 8 mln) – distributed between 2 (two) full-length and 2 (two) short films<sup>70</sup>. During 2017–2020, financial means were allocated to private studios to produce 6 winning full-length films.

<sup>67</sup> Management structure (<http://cbd.minjust.gov.kg/act/view/ru-ru/95380?cl=ru-ru#p2>).

<sup>68</sup> Provisions on Expert Commission (<https://clck.ru/R9RFy>).

<sup>69</sup> Project contest conditions (<https://clck.ru/R9RDP>).

<sup>70</sup> Information provided by the Cinematography Department.

In the course of 2017–2019, after the Cinematography Department had allocated means for filmmaking, state financing for filmmaking was distributed between the Cinematography Department and Kyrgyzfilm Studio as follows: Kyrgyzfilm – KGS 64,400,000 (USD 937,787), Department – KGS 31,500,000 (USD 458,725)<sup>71</sup>. Over 60% of all produced films are short documentaries and videos<sup>72</sup>.

## 2) Cinematography Department Board

The Department has a Board composed of the Director (Board Chairperson), Deputy Director, Ministry representative, filmmakers, cultural, information and art workers, as well as heads of the Department's subordinate institutions and organizations. The Board's membership is approved by the Minister of Culture, Information and Tourism of the KR based on the proposal of the Board Director. The Board is a consultative and advisory body governed by Board Regulations approved by order of the Minister of Culture (Regulations, Clause 17). Its functions include reviewing and discussing projects and making decisions based on which the Department subsequently finances projects.

## 3) T. Okeyev Kyrgyz film National Film Studio

The Kyrgyzfilm Studio is managed and subordinate to the Cinematography Department. The latter also coordinates the Studio's work.

As of the end of 2020, according to the law the Kyrgyzfilm management independently decided on project financing on the basis of the in-house Artistic and Expert Council. The issue of changing this procedure is currently a subject of discussion among domestic filmmakers, since such a budget allocation scheme is not sufficiently transparent.

## 4) Kyrgyzfilmfond National State Cinema Fund

The Kyrgyzfilmfond is a state agency operating under and subordinate to the Cinematography Department. Its main functions include preserving, replenishing, maintaining and developing the state film fund, as well as popularizing national cinematography.

## 5) Directorate of Ch. Aitmatov National Cinema Center

The Cinema Center is a state institution working under and subordinate to the Cinematography Department. Its main activities include holding of various meetings, seminars, festivals, fora, discussions, conferences, lectures, film screenings and reviews.

In Kyrgyzstan, only a few public and non-governmental organizations operate in the field of cinematography:

**1) Union of Cinematographers of Kyrgyzstan (UC of the KR)** was established in 1958. Currently, 297 filmmakers (226 male and 71 female) are registered as Union members. By way of working and initiative groups formed from among its members, the Union launches and supports various filmmaking projects, both private- and state-supported. Jointly with foreign embassies and the Cinematography Department, the Union executed various cultural exchange programs, thematic fora, seminars, and cinema weeks;

**2) Producers Guild** was created as an informal association based on the initiative of the UC of the KR in 2014. At the moment, the Guild includes approx. 20 persons. The Guild started its work with settling some of the priority issues, achieving agreements with cinemas and ensuring equal conditions for the effective distribution and screening of domestic films in the country's cinemas. The adopted rules are observed by producers on a voluntary basis. This scheme has proven itself efficient and is still valid;

<sup>71</sup> *Idem*.

<sup>72</sup> "Assessment of the state of the film industry and relevant legislation in Kyrgyzstan" by Erke Dzhumakmatova. UNESCO Project "Strengthening the film industries in Central Asia", 2020.

3) **Stuntman Guild of Kyrgyzstan** was also established in 2014;

#### 4) **10+ Cinematography Development Foundation**<sup>73</sup>

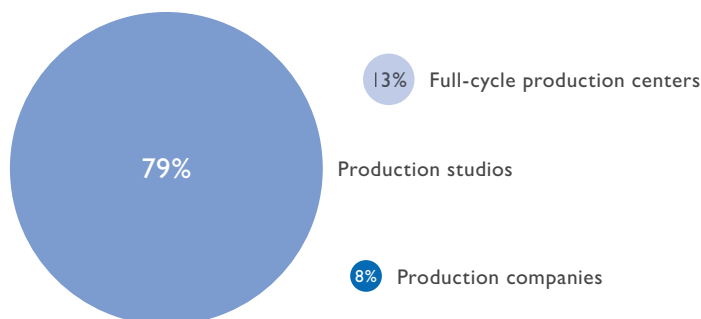
The Foundation was established in 2006 as an independent non-governmental organization with the aim of developing and supporting Kyrgyzstan's filmmaking, especially to ensure proper management of the Foundation's projects implemented under its development strategy. In 2006–2014, the Foundation executed various cinematography related projects, including master classes, training and courses.

#### 5) **Fund of Art Females of Asia**<sup>74</sup>

The Fund was created as a public non-governmental organization in 2016 with the main tasks of supporting and promoting women's creativity, implementing innovative ideas, and promoting and protecting the rights of creative women and female directors.

Out of the array of private and officially registered filmmaking companies and various incorporation status (LLC, Private Entrepreneur (PE), up to 50 large private studios<sup>75</sup> have been consistently operating in Kyrgyzstan, producing mainly full-length films; 90% of them operate and are located in Bishkek. This figure is based on the number of distribution certificates issued to domestic films in the course of 2015–2020, since at the time of this study a method for accounting or statistical reporting by filmmaking organizations was missing. TV channels, both public and private, are practically not present in the film production market, do not act as requestors of video content, TV series or films, etc., and thus do not affect the assessment of the film industry in Kyrgyzstan currently.

**Fig. 6. Private filmmaking companies in Kyrgyzstan by functions**



On average, every year Kyrgyzstan's private filmmaking companies produce 25–30 full-length films (in 2017, 52 films were shot). State budget funding covers an average of 2 full-length films a year.

In Kyrgyzstan, on an annual basis state, public and non-governmental cinema-related organizations hold several international and national film festivals:

1) **Bir Duino International Film Festival (IFF)**<sup>76</sup>, the only human rights documentary festival in Central Asia;

<sup>73</sup> [http://www.kyrgyzcinema.com/index.php?option=com\\_content&view=article&id=64&Itemid=39&lala=ru](http://www.kyrgyzcinema.com/index.php?option=com_content&view=article&id=64&Itemid=39&lala=ru)

<sup>74</sup> Official account (<https://www.facebook.com/fundartfem/>).

<sup>75</sup> "Assessment of the state of the film industry and relevant legislation in Kyrgyzstan" by Erke Dzhumakmatova. UNESCO Project "Strengthening the film industries in Central Asia", 2020.

<sup>76</sup> Official website of the Bir Duino IFF (<http://birduino.kg/festival/>).

**2) Kyrgyzstan – Land of Short Films (KLSF) Festival<sup>77</sup>**, an international festival of the CIS countries, Baltic states and Georgia;

**3) Karek Republican Children and Youth Film Festival<sup>78</sup>** (held since 2016);

**4) Film Forum of Women Directors of Kyrgyzstan Festival<sup>79</sup>**, the first and only festival for women directors in Central Asia launched by the Fund of Art Females of Asia, and held since 2016;

**5) Olgon-Khorkhon Festival<sup>80</sup>**, a multi-genre short film and video art festival established by the Creative Group 705 association of young filmmakers in 2015. The Festival has a non-standard and experimental format; all films are created specifically for the festival in accordance with year-specific theme;

**6) Ak Ilbirs (Snow Leopard) National Award<sup>81</sup>**, established by Kyrgyz filmmakers in 2012, is conferred in recognition of the merits and achievements of domestic cinematographers, as well as to stimulate the artistic advancement of national cinema. The Award is supported by the Ministry of Culture, Information and Tourism of the KR, Union of Cinematographers of Kyrgyzstan, Aytys Public Foundation, and IO+ Cinematography Development Foundation. Legally, it is a public foundation, and currently has 14 participants;

**7) Umut Forum of Young Cinema of CIS Countries<sup>82</sup>** (held since 2013).

At the time of the study, efforts were underway to digitize Kyrgyzstan's cinemas and deploy a UAIS within the country's film distribution system. The initiative became possible as part of the *Year of Regional Development, Digitalization and Child Support Program* announced by the President of the KR in 2020, currently still ongoing due to the coronavirus pandemic situation.

On February 29, 2019, the Alliance of Creative Industries was created in Kyrgyzstan, and announced at the “Creative Central Asia. The New Model of Kyrgyzstan's Economic Growth” Round Table. The event focused on unlocking the potential of the creative industries and creating domestic high added value products. The round table was organized by the Central Asian Association for the Development of Free Economic Zones jointly with the Ministry of Economy of Kyrgyzstan, Regional Institute of Central Asia (RICA) Analytical Center, American University in Central Asia (AUCA), and brought together the top representatives of the creative industries<sup>83</sup>.

Despite a number of current challenges, it should be recognized that Kyrgyzstan's film industry has been evolving independently, slowly but surely, and mainly via private initiatives. The most important players in the film industry include investors, film studios, distribution companies and cinemas. Investment can be public, private, foreign, and joint (PPPs), as well as mixed – the state subsidises 50% of the estimated project costs, if the beneficiary of the subsidy is not a PPP participant and covers the remaining expenditure by mobilizing foreign investments and own private capital.

Additionally, all investments are distinguished as refundable and non-refundable. Yet, currently Kyrgyzstan has no legal framework regulating the return of public investment.

<sup>77</sup> Official webpage of the KLSF Festival (<https://www.facebook.com/kskf.filmfest.kg/>).

<sup>78</sup> Information provided by Karek Film Festival organizers.

<sup>79</sup> Information provided by the festival organizers.

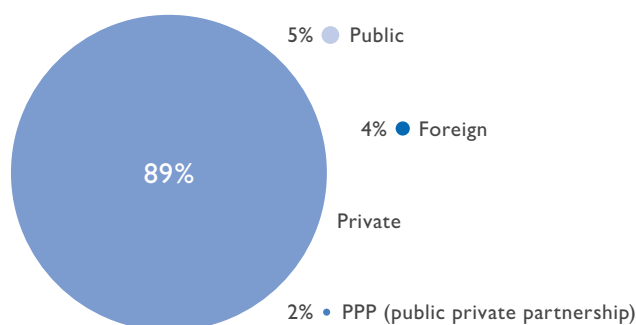
<sup>80</sup> Festival webpage (<https://clck.ru/RDd7u>).

<sup>81</sup> Official account of the Ak Ilbirs National Award (<https://www.facebook.com/akilbirs2020/>).

<sup>82</sup> Information provided by the Cinematography Department of the KR.

<sup>83</sup> Publication link: <https://clck.ru/RDWxs>

**Fig. 7. Distribution of main film industry investments in Kyrgyzstan<sup>84</sup>**



The total number of full-length films produced in Kyrgyzstan in 2015–2020 amounts to 180, including 9 with state and 171 with private financing<sup>85</sup>.

In descending order, the main investment sources in film production in Kyrgyzstan are the following:

- Sponsorship, corporate investors (commercial companies, banks, etc.);
- Private investors-producers (sponsorship and loan facility);
- Own funds (including borrowed);
- Financial institutions (loans against real estate, vehicles, etc.).

Non-primary financing sources include:

- Public investment (difficult to obtain);
- International funds, grants (isolated cases);
- Philanthropy and charity (isolated cases);
- Foreign co-producers, co-production (isolated cases);
- Crowdfunding (isolated cases).

Based on the data of the Cinematography Department, in 2020 the structure of the domestic state cinema network included<sup>86</sup> 4 mobile film installations (which were not considered during overall calculation, since they do not operate on a permanent basis and, thus cannot alter the main indicators); 37 state cinemas, including 12 under state lease agreements, 9 operating, 3 (not operating) requiring upgrading; and – out of the 25 remaining – 4 operating, and 21 (not operating) requiring technical upgrading, fitting with digital equipment, partial or major premises repair, etc.

The private film network includes 10 private cinemas, including 2 in Osh and 8 concentrated in Bishkek.

The Cinematica Cinema Network is the largest private film distribution organization in Kyrgyzstan managing 3 modern multiplexes in shopping and entertainment complexes and one 3-hall cinema (detached building under state lease).

Of the total number (47) of public and private cinemas (101 halls, and 18,462 seats) in the country, in reality only 23 cinemas (77 halls, and 11,064 seats) are fully operational.

<sup>84</sup> "Assessment of the state of the film industry and relevant legislation in Kyrgyzstan" by Erke Dzhumakmatova. UNESCO Project "Strengthening the film industries in Central Asia", 2020.

<sup>85</sup> Information provided by the Cinematography Department of the KR.

<sup>86</sup> *Idem*.

Bishkek and Osh are the most affluent cities in terms of film screening.

As per the official data of Kyrgyzstan's Cinematography Department, in 2019 340 films received distribution certificates, including 30 produced domestically and 310 of foreign production. In 2020, the same indicator amounted to 68, including 7 domestic and 61 foreign films.

Based on 2019–2020 statistics, in total 408 films were released in Kyrgyzstan, including 37 of domestic and 371 of foreign production.

The total box office across the country<sup>87</sup> amounted to: 2018 – KGS 282,684,400 (USD 4,096,876), in 2019 – KGS 458,025,000 (USD 6,543,215).

## 2.4. Institutional capacity, including existing specialized educational and training institutions, programs and schools

Kyrgyzstan has 3 higher educational institutions training filmmaking and TV professionals, all of them located in Bishkek. There are no specialized industry-specific educational institutions, colleges, specialized secondary education establishments in the country.

### 1) B. Beishenaliyeva Kyrgyz State University of Culture and Arts<sup>88</sup> (KGUKI, previously KGII)

The first Film and TV Department opened at KGII in 1991 with the following majors: Cinema and TV Directing, Cinema and TV Photography, Cinema and TV Sound Engineering, Cinema and Theater Acting, Screenwriting, and Filmmaking Economics. In 2018, 22 students (7 female and 15 male) studied at the department; in 2019 – 23 students (13 female, 10 male); and in 2020 – 30 students (9 female, 21 male). The training is done both on a state budget (free) and contractual (paid) basis.

### 2) Manas Kyrgyz-Turkish University (KTU), public university<sup>89</sup>

Manas Kyrgyz-Turkish University was established in 1993 following the Agreement between the Government of the Kyrgyz Republic and the Government of the Republic of Turkey. The KTU's diplomas are recognized both in Kyrgyzstan and Turkey, as well as in CIS and non-CIS countries. The University is funded by the Government of Turkey. The training in all areas is carried out on a budgetary (free of charge) basis; in addition, students are awarded a general scholarship and a separate academic achievement scholarship, free medical care, as well as hostel accommodation and meals at extremely moderate prices. The KTU offers student international exchange programs and foreign internships.

In 2003, the School of Communications was opened at the Department of Radio, Television and Cinema. The school issues a general no-major (no special profile) diploma. It has been actively collaborating with external partners in the information domain; entering into agreements with TV and radio companies; providing students with the opportunity to get applied professional experience in the process of training. In the 2019–2020 academic year, 24 undergraduates (1<sup>st</sup>–2<sup>nd</sup> year) and 7 PhD students were registered in the school<sup>90</sup>. In 2020, 140 students (1<sup>st</sup>–4<sup>th</sup> year, study duration 2016–2020) were undergoing studies at the School of Communications, including 102 females and 38 males<sup>91</sup>.

<sup>87</sup> Data of the Cinematography Department of the KR.

<sup>88</sup> Official website of KGUKI (<http://kguki.kg/>).

<sup>89</sup> Official website of Manas KTU (<http://www.intl.manas.edu.kg/ru>).

<sup>90</sup> *Idem*.

<sup>91</sup> *Idem*.

### 3) American University of Central Asia (AUCA), non-state university<sup>92</sup>

The American University of Central Asia was founded in 1993 with the financial support of the US Government and the Open Society Institute of the Soros Foundation.

Since 2010, AUCA has established an official partnership with Bard College, NY, United States. The partnership allows students to obtain humanities degrees fully accredited in the US. The majority of classes are conducted in English. Training is contract-based. In 2016, the Department of Television, Cinema and Media Art opened offering a general (no-major) diploma without specialization. The total number of students at the department (1<sup>st</sup>-4<sup>th</sup> year, study duration 2016–2020), including those graduating in the fall of 2020, amounted to 63 persons, including 28 females and 35 males<sup>93</sup>.

Also, periodically famous directors and various public organizations, both independently and jointly, create and conduct original courses and master classes for film directors, screenwriters and producers with the involvement of domestic and foreign filmmaking masters. Based on the training outcomes, AUCA holds screenings of the best student works.

## 2.5. Main challenges, issues and significant gaps impeding the development of culture industries, in particular the film industry

Having assessed Kyrgyzstan's current legislation regulating filmmaking, it can be argued that overall the adopted resolutions, regulations, by-laws and standards correspond to the goals and objectives of cinematography. However, in real life the absence of certain legal regulations as well as failure to comply with the legislation in effect are observed, in particular:

- State financing of cinematography in the amount of at least 0.1% of the national budget is not implemented (in fact, the allocated funding on average does not exceed 0.05%) (Art. 9)<sup>94</sup>;
- The 2020 *Programme for the Development of Cultural Sphere* (adopted in 2015) is not sufficiently implemented<sup>95</sup>;
- The benefits for cinematography patrons are neither identified nor granted under the effective *Law on Patronage and Charity* (Art. 11)<sup>96</sup>;
- The mechanisms to combat piracy, protect licensing rights and enforce copyright legislation are ineffective;
- A systemic policy to create and ensure the investment attractiveness of filmmaking, various incentive mechanisms – in the form of tax preferences, concessions, or certain benefits – to stimulate both domestic and foreign investors is lacking;
- A systemic state policy on and support for international cooperation and co-production (joint film production) with foreign countries is missing;
- A strategy and systematic state support for promoting domestic films, both at the national level and abroad, in particular participation of domestically produced motion pictures in world film markets, as well as their presentation and promotion at major world festivals, and distribution, etc. is lacking;

<sup>92</sup> Official website of AUCA (<https://dss.auca.kg/bachelor-in-tv-cinema-and-media-arts/>).

<sup>93</sup> *Idem*.

<sup>94</sup> On execution of the law (<http://cbd.minjust.gov.kg/act/view/ru-ru/72882>).

<sup>95</sup> Programme for the Development of Cultural Sphere (<http://cbd.minjust.gov.kg/act/view/ru-ru/98149>).

<sup>96</sup> Law of Patronage and Charity (<http://cbd.minjust.gov.kg/act/view/ru-ru/282>).

- The regulations on the state financing of distribution and/or promotion of national films are implemented either poorly or differentially (Art. 11, 12)<sup>97</sup>;
- Statutory instruments regulating the system of repayment and/or return of public investment, as well as their accumulation for further use for cinematography purposes are lacking;
- Inefficiency and insufficiency of existing accounting mechanisms, collection of information and monitoring of sociological, statistical and analytical data in the field of cinematography in Kyrgyzstan to study and analyze data; absence of a structured and unified national database of all organizations engaged in the film industry;
- Mismatch of labor legislation with the peculiarities of creative work; lack of a contract-based mechanism for hiring film industry staff preventing the possibility of attracting both professional managers and young talented artists into the sector;
- Outdated and/or missing industry-specific legal terminology/concepts (Art. 3)<sup>98</sup>.

Based on interviews with domestic filmmakers, in addition to the above-mentioned points, the most urgent issues requiring immediate attention include the following:

- Development of systemic and well planned state support; introduction of the concept of CCIs into legislation; development of a country-wide strategy; establishment of creative clusters; promotion and support of cultural industries' exports;
- Incentive and preference mechanism in the form of tax incentives for distributors;
- Introduction of film distribution support measures, for example, exemption of cinemas from VAT (12%), etc. Absence of a state programme to deploy UAIS and control income in the film sector. The interviewees noted that an assessment of the status quo and development prospects of the state film network requires independent monitoring and investigation of all industry facilities. The lack of financial means allocated annually for film industry purposes complicates even a phased-out upgrading of state film facilities;
- The system of Kyrgyzstan's cinematography-related education lacks several technically narrow specializations necessary in the modern film industry, such as sound engineers, gaffers (foremen-illuminators), special effects and computer graphics specialists, color editors and film mechanics. Specialized training of professional film critics, film experts and film managers (producers, distributors, festival agents and film production managers) is likewise lacking. The same is true for film industry artists (production artists, decorators, props, costume designer, make-up artists and hairdressers). There is also an obvious shortage of second-tier professionals. The ongoing absence of secondary professional cinematographic education in Kyrgyzstan has led to an overall lack of film industry personnel. The respondents likewise pointed to the need to create and develop a system of private secondary professional cinematographic education, as well as to consider the possibility of introducing professional refresher courses at universities, secondary special educational institutions, and at the Kyrgyzfilm State Studio. Their creation by both private and non-governmental organizations can be encouraged by attracting grants, engaging foreign specialists based on interstate agreements, etc.
- In addition to the existing positive examples – Producers Guild and Stuntmen Guild of Kyrgyzstan – the respondents noted the need for establishing sectoral trade unions capable of influencing the industry as a whole, supporting creative workers (trade union members) and protecting their interests, as well as regulating the earnings of trade union workers.

<sup>97</sup> Law on State Support of Cinematography of the KR (<http://cbd.minjust.gov.kg/act/view/ru-ru/919?cl=ru-ru>).

<sup>98</sup> *Idem*.

## 03. OVERVIEW OF THE STATE OF THE FILM INDUSTRY IN THE REPUBLIC OF TAJIKISTAN



Shooting of the movie “Water Boy”. © “Tajikfilm” State Agency

### 3.1. Brief historical survey of the film industry and its development

The first shooting on the territory of modern Tajikistan was carried out by visiting filmmakers and was mainly ethnographic in nature. It was at that time that the first cinemas opened in Khujand, Istravshan, Kanibadam, and Dushanbe.

The year 1929 marks the dawn of independent filmmaking at a small Film Production Laboratory of the People's Commissariat of Education. In 1930, the Tajikino (rus. *Tajikistan Film*) Trust (later the Stalinabad Film Studio) was established based on the Film Production Laboratory. Initially, it produced monthly *Soviet Tajikistan Newsreels* (collections of film reports) and was engaged in film distribution. The Tajikino was subsequently renamed the *Tajikfilm* State Film Studio.

Feature film production began in 1932 with the full-length “When Emirs Die” movie by Lidiya Pechorina, the first female film director who came to Tajikistan.

During 1941–1943, at the time of the Great Patriotic War, the Stalinabad Film Studio merged with the *Soyuzdetfilm* Moscow Film Studio of Children and Youth Films (later, the Gorky Film Studio) with the primary task of building a new film production laboratory. By the end of the war, the film studio had its own staff consisting of multiple subject-matter cinematographic specialists, and played a significant role in the overall advancement of Tajik national cinema in the second half of the 20<sup>th</sup> century. Soon after the return of the *Soyuzdetfilm* technical division to Moscow, feature film production at the Stalinabad Film Studio stopped due to the lack of necessary conditions.

Live-action filmmaking resumed in the mid-1950's – the new cohort of young filmmakers that graduated from VGIK and came to work in Dushanbe brought with them the creative rise of the Tajikfilm Studio in the 1950–1970's. During the same time, the *Goskino* of the Tajik SSR held advanced training courses for film industry workers.

In 1956, the Soviet Government decided to launch the construction of cinemas across the republic based on USSR State Bank loans. Despite the widespread propaganda of Tajik cinema, domestic cinemas were not self-sustaining.

At the turn of the 1980–1990's, Tajik cinema entered a new phase recognized as the Tajik Dawn by film critics and associated with the emergence of a new allegorical direction of Tajik postmodern filmmaking. In 1987–1989, the Government of the Tajik SSR took steps to develop specific proposals for restructuring the activities of the Tajikfilm Studio and film distribution, as well as their transition to self-financing. In the 1990's, the first independent film studios emerged.

The collapse of the USSR, subsequent civil war (1992–1997), lack of proper funding for the film industry, as well as the emigration of creative and technical personnel led to the fact that during the early years of independent Tajikistan, the Tajikfilm State Film Studio produced only official newsreels and documentaries. During 1990–2000's, low- and micro-budget filmmaking models associated with the overall economic crisis of the post-war recovery period got firmly rooted in Tajikistan's cinema. In the 2000's, the Tajikfilm Studio gradually shifted to the TV market.

2009–2019 became the new phase in the development of Tajik filmmaking. Firstly, it was associated with the appearance of young filmmakers who replaced the senior generation; some of them were educated at international film schools in Russia, Korea, India, US, or, on the contrary, those who had taught themselves practical skills<sup>99</sup>. The new Tajik cinema includes several stylistic schools due to exposure to different film education models<sup>100</sup>. Since 1997, the Tajikfilm Studio and Tochikkino (rus. *Tajik Cinema*) Cinema and Video State Unitary Enterprise (domestic film distribution) were subordinate to the State Television and Radio Committee under the Government of the RT. In late 2017, they were separated and transformed into a single independent agency – *Tochikfilm* State Enterprise under the Government of Tajikistan – that combined film production facilities and infrastructure, film distribution and centralized cinematography policymaking and management<sup>101</sup>.

In 2004, the Law of the RT *On Cinema* was drafted and adopted.

### 3.2. Brief review of national film industry related legislation

#### 1) Law on Cinema of the Republic of Tajikistan

The 2004 *Law on Cinema* – defining the main principles and measures for the implementation of the state policy aimed at advancing the national film industry – constitutes the fundamental industry-specific legal framework.

In addition to the basic concepts of the film sphere and principles of the state filmmaking policy, the law outlines and stipulates the following:

- Categories of national films and their shares of state financing (Art. 3);
- Authorized body for the implementation of state cinematography policy, as well as its tasks (Art. 5);
- Terms and procedures of state filmmaking financing (Ch. 3), including film production, distribution, and participation in film festivals. The law states that all cinematographic organizations shall be entitled to state support (Art. 6), and that the procedure for receiving such state financing shall be determined by the authorized body (Art. 7). In general, state financing of a national film shall not exceed 70% of the estimated production expenditure, but may reach 100% in exceptional cases (Art. 8);

<sup>99</sup> Arabova, Sh., Hong, S. (2019). Development Stages of Tajikistan's Cinema (1929–2019). Korean Journal of Russian Language and Literature 31(4). Jinju: Korean Association of Russian Language & Literature, 2019, p. 279. Available at: <http://www.dbpia.co.kr/journal/articleDetail?nodeId=NODE09289513> (accessed August 29, 2020).

<sup>100</sup> Arabova, Sh. (2018). Cinematography in Central Asian countries: state, trends and development potential. Analytical report (October 2018). Bishkek: Regional Institute of Central Asia (RICA), 2018, p. 9.

<sup>101</sup> Enactment of the Government of the Republic of Tajikistan № 598 *On Establishing the Tochikfilm State Enterprise* of December 29, 2017.

- Licenses necessary for the production of film and video content, creation and activities of filmmaking organizations, as well as export and import of film and film products (Art. 13);
- State Film Register<sup>102</sup> and registration procedure (Art. 15). All films produced and imported for public demonstration into Tajikistan allowing them to enter official distribution schemes shall be subject to registration in the State Film Register. Foreign film registration shall be issued for a 1-year period; the corresponding registration fee shall amount to TJS 600. For comparison, registering a national film for country-wide release (also valid for 1 year) costs TJS 2,500<sup>103</sup>.
- Film audience age indexing (rating) procedure (Art. 16).

Due to the fact that since late 2017, Tajikistan's filmmaking has been operating within the framework of an independent state agency, the original 2004 Law on Cinema required updating. In 2019–2020, the Tochikfilm SE and Union of Cinematographers of Tajikistan jointly drafted the new *Law on Cinematography* currently undergoing review by the national parliament.

## 2) 2018–2022 State Cinema Development Program of the Republic of Tajikistan

The Program was adopted as per Enactment № 457 of the Government of the RT of September 29, 2017, and identifies the priority areas, tasks and mechanisms for the implementation of state policy in the film sector, as well as forging conditions for enhancing the quality of film production and distribution (Cl. 1 of Ch. 1). The Program likewise lists a number of pressing industry-specific issues (Cl. 28 of Ch. 6), including: poor material and technical base, inter alia shortage of modern equipment and technologies; lack of financial resources for the sector's progress; existing cinematographic infrastructure, especially at local and regional levels, lagging behind modern sector requirements; non-compliance of domestic film production with the requirements of current global standards; lack of highly qualified personnel and a low degree of material and moral encouragement of industry specialists; non-compliance with the modern requirements/rules of cinema ticket sales/purchases; absence of adequate film storage and restoration facilities; weak legal framework to prevent illegal use of audio visual materials. Also, the Program states the insufficient technical fitting of cinemas and their absence in rural areas (Cl. 11 of Ch. 2), as well as proposes ways for addressing the identified challenges and fulfilling the necessary tasks (Ch. 7), lists the Program's funding sources (Cl. 32 of Ch. 8) and expected results (Ch. 9).

## 3) Law on Culture of the Republic of Tajikistan

The 1997 *Law on Culture* applies to cultural activities in the field of cinema, television, radio broadcasting and other audiovisual media in terms of creating and disseminating cultural property (Art. 2). Yet, further the Law does not refer to cinematographic heritage and film artworks (Art. 8 on national cultural values of the Republic of Tajikistan), and cinema and video distribution are referred to as a mechanism for disseminating and popularizing national cultural heritage and the cultural achievements of Tajikistan (Art. 9). The Law lists cinemas among the institutions, enterprises and cultural organizations of the Ministry of Culture (Art. 18), although they are actually simultaneously managed by the Tochikfilm Cinema and Video SUE (domestic distribution) and Television and Radio Committee. Since the national Ministry of Culture is mandated to protect copyright and related rights, the Law on Culture regulates the amount of copyright remuneration, corresponding procedures and schedule of payment as per the relevant copyright contract.

<sup>102</sup> All films produced in Tajikistan, as well as these imported to Tajikistan for distribution and public demonstration, with the exception of films shown at festivals, seminars, retrospective demonstrations and other events, shall be registered in the film register.

<sup>103</sup> Tochikfilm State Film Studio Service Fees of June 22, 2018, approved by the Decision of the Antimonopoly Service under the Government of the Republic of Tajikistan of June 25, 2018 (information provided by the Tochikfilm Studio).

#### 4) Concept for the Development of Culture in the Republic of Tajikistan

Adopted every 5 years, the valid Concept for the Development of Culture in the RT (2005)<sup>104</sup> – covering the main and priority areas for the development of culture and socio-cultural life in the country – represents a legal instrument indirectly related to the film industry. The Concept narrows down the role of cinema to the preservation of historical and cultural heritage through the production of popular science films, video and audio content promulgating the significance and uniqueness of historical and cultural objects (Art. 14).

#### 5) Other legislative documents

Whereas the Law on Cinema (2004) and the ongoing Filmmaking Development Programs regulate the film industry as a whole, film production, distribution and screening are also regulated by the *Law on Licensing Certain Types of Activities*, *Law on Information*, *Law on Periodical Press and Other Media*, Regulations of the State Television and Radio Committee and, to an extent, by the *Law on Advertising*.

Due to the fact that audio-visual activities – including cinematography as a type of such activities – are classified as information activities, in 2004 the Law of the RT *On Licensing Certain Types of Activities* was adopted<sup>105</sup>. Based on the Law, the following filmmaking related activities shall be subject to mandatory licensing (Art. 17):

- Activities in the field of education with the exception of public pre-school and general education institutions (primary, basic general and general secondary);
- Activities in the field of television, radio broadcasting and audio-visual work.

The licenses for the above mentioned activities shall be valid for at least 5 years (Art. 8), and the license fee shall amount to 10 calculation units (Art. 16)<sup>106</sup>. In accordance with the *Law On Licensing Certain Types of Activities* and Regulations of the State Television and Radio Committee under the Government of the RT (2020), the authority to issue licenses for conducting activities in the field of television and radio, production of audio-visual products, as well as to monitor compliance with license terms and requirements shall be assigned to the TV and Radio Committee (Art. 5). Its mandate also includes determining the amount and procedures for paying copyright, staging and performance fees, as well as for the creation of all types of TV, radio and film works; likewise, determining charge rates for the creation of literary and artistic works, original literary and musical scripts, all types of television, radio programs, and films; executing work on collecting, storing, registering and using media archival documents<sup>107</sup>.

Along with audio-visual production licensing, several state registration certificates (a license of sorts) are in effect specifically in Tajikistan's film industry, issued by the Tochikfilm SE since 2018<sup>108</sup>.

As per the 2009 *Law on State Language of the RT*<sup>109</sup>, film production by the Tochikfilm State Studio, film demonstration, film education and film advertising shall mainly be carried out in the state language used in all spheres of political, social, economic, scientific and cultural life of Tajikistan. While using the state language, it is mandatory to observe the norms of the literary Tajik language (Art. 3, 8, 13).

<sup>104</sup> Concept for the Development of Culture in the RT approved as per Resolution № 501 of December 30, 2005.

<sup>105</sup> Law № 37 On Licensing Certain Types of Activities of May 17, 2004 (last amended as per Law № 195 of July 28, 2006).

<sup>106</sup> Procedures on the peculiarities of licensing and inspecting the activities of legal and physical persons in the field of public screening of films and videos (№ 214 of May 31, 2006).

<sup>107</sup> Regulations of the Television and Radio Committee under the Government of the RT. Annex I to Government Enactment № 428 On the Television and Radio Committee under the Government of the RT of July 30, 2020.

<sup>108</sup> Official website of Tochikfilm SE. Available at: <https://tojikfilm.tj/ijozatnomaho/> (accessed July 21, 2020).

<sup>109</sup> Law of the RT № 553 *On State Language of the Republic of Tajikistan* of October 5, 2009. Akhbori Majlisi Oli of the RT, 2009, № 9–10, p. 546.

Archiving and protection of cultural heritage, which includes works of Tajik cinematic art, are within the mandate of the national Ministry of Culture, and are primarily regulated by the Law on Cinema (2004), approved Rules for storing original materials of national films, film heritage and film chronicles (2006)<sup>110</sup>, 2008–2018 Concept for the Development of Archiving in Tajikistan, Law on the Protection of Items of Cultural and Material Value, Law on Copyright and Related Rights, and 2014–2020 National Strategy for the Development of Intellectual Property of the RT<sup>111</sup>. The Tajik State Archive of Documentary Films operates at the Tochikfilm State Studio. The State Archive of Film-Photo-Phono Documents, which contains part of the Tajik cinematography patrimony, mainly Soviet time documentaries, also operates at the Central State Archive of the RT.

The national Law on Copyright and Related Rights (1998) is a standard piece of legislation specifying an author's personal non-property rights, property rights, exclusive rights and related rights applicable to copyright objects (Art. 5), which – if interpreted – can be a part of or constitute film production working materials (e.g. screenplay, storyboard, sketches, photography, soundtrack). Copyright is valid throughout the life of an author, is inheritable and in effect for 50 years after the author's death, after which it passes into the public domain. In turn, the Government of Tajikistan has the right to establish a fee for using the works transferred to the public domain in the territory of Tajikistan. The fee is paid to authors' professional funds and organizations managing authors' property rights on a collective basis. Such fees may not exceed 1% of revenues (Art. 17, 18). Although cinema is a collective art, the Law (Art. 13) recognizes only the director, screenplay author (screenwriter) and author of musical content (with or without lyrics) specifically created for an audio-visual work (composer) as authors of an audio-visual work.

The state policy on intellectual property – the types of which include cinematic and mass filmmaking works – is regulated by the Commission for Coordination of Activities to Combat Intellectual Property Violations under the Government of the RT, Ministry of Culture of the RT (Department of Copyright and Related Rights), Ministry of Internal Affairs (Department for Combating Intellectual Property Crimes), and Customs Service under the Government of the RT<sup>112</sup>. As per the Regulations of the Ministry of Culture<sup>113</sup>, its Department of Law, Protection of Copyright and Related Rights shall collect, distribute and pay the fees of domestic and foreign authors prior to the establishment of organizations collectively managing authors' property rights.

The international legal instruments regulating copyright and related rights to which Tajikistan is a signatory include the following: Convention Establishing the World Intellectual Property Organization (WIPO), Universal Copyright Convention, Berne Convention for the Protection of Literary and Artistic Works, International Convention for the Protection of the Interests of Performers, Producers of Phonograms and Broadcasting Organizations, WIPO Copyright Treaty (1996), WIPO Performances and Phonograms Treaty, Convention on the Protection of the Interests of Producers of Phonograms against Unauthorized Duplication of Their Phonograms<sup>114</sup>, Agreement on Cooperation in the Field of Copyright Protection and Related Rights of CIS Countries (1993), Agreement on Cooperation in Combating Intellectual Property Offences of CIS Countries (1998), and Agreement on Cooperation in the Organization of Interstate Information Exchange and Formation of National Databases of Copyright and Related Rights (2010).

<sup>110</sup> Enactment № 139 *On film storage, registration and indexing* of April 3, 2006.

<sup>111</sup> 2013–2020 National Strategy for the Development of Intellectual Property of the RT approved as per Government Decision № 371 of June 3, 2014.

<sup>112</sup> *Idem*.

<sup>113</sup> Enactment of the Government of the RT № 604 *On the Ministry of Culture of the Republic of Tajikistan* of December 28, 2006.

<sup>114</sup> Copyright. Official website of the Ministry of Culture of the RT (<https://vfarhang.tj/index.php/ru/dokumenty/avtorskoe-pravo>).

Thus, analysis of Tajikistan's legislation concludes that cinematography is classified as a mass media, although nominally it is a type of art.

### 3.3. Key film industry organizations, principles of their operation and interaction. Film fora

Due to the need to coordinate the efforts by state authorities, organizations, institutions and public associations aimed at the development of national cinematography and implementation of the state filmmaking policy, in 2015 a permanent advisory body was established – Government Board for the Development of National Cinema. Its structure takes account of the fact that the Tochikfilm Studio operates under the Television and Radio Committee. The Board meets at least twice a year with the main tasks of drafting proposals for the development of national cinematography, supporting the interests of the film industry within the framework of legislative and budgetary processes, developing and submitting draft cinema-related regulations, developing protectionist measures (protection of domestic market from foreign competition through import and export duties, subsidies, etc.) associated with Tajikistan's film market<sup>115</sup>.

The Tochikfilm SE under the Government of the RT represents the main cinematography agency combining film production facilities, film distribution and centralized management of the sector-specific policy<sup>116</sup>. It is financed from the state budget in accordance with the regulations of the Program for the Development of Cinema, at the expense of own special funds and commercial activities executed as per the agency charter. As an art object, cinema has not been included in the jurisdiction of the national Ministry of Culture from the mid-1990's till the present.

Compared to the legally established maximum staff (312 persons), as of late 2019, Tochikfilm employed 284 persons, including 74 females (3 in senior positions)<sup>117</sup>. According to data from the first half of 2020, 214 men and 80 women worked at the agency, including 14 women in management positions<sup>118</sup>.

The Tochikfilm's regional branches mainly produce commissioned documentaries of a historical, ethnographic and anniversary nature. The staff of the Tochikfilm's Sughd Regional Branch have more opportunities for creating short feature films thanks to investments due to the more developed local private entrepreneurship and philanthropy in the field of culture.

In Khorog, amateur video studios operate producing documentary reports and stories of an informational nature, but currently there is no non-state professional film production<sup>119</sup>.

Other notable film producers include Kamil Yarmatov Sugdsinamo SE with the headquarters located in Kanibadam and Bakhtier Khudonazarov Khatlonsinamo SE with the headquarters in Bokhtar. These film studios were established with the support of local (region-level) executive authorities with the aim of developing film production in the region and promoting national films. The funding for both studios is partly covered by local authorities and the private sector.

<sup>115</sup> Regulation № 355 On the Government Board for the Development of National Cinematography of May 30, 2015.

<sup>116</sup> Enactment of the Government of the Republic of Tajikistan № 598 *On Establishing the Tochikfilm State Enterprise* of December 29, 2017.

<sup>117</sup> 2019 Final Employment Report. Quantity and quality of labor (information provided by the Tochikfilm SE).

<sup>118</sup> Press conference of Tochikfilm SE of July 23, 2020. Speech by Pirzod Makhmadsaid Shokhiyion, Tochikfilm SE Director. Available at: <https://tojikfilm.tj/ru/2020/07/%D0%BF%D1%80%D0%B5%D1%81%D1%81-%D0%BA%D0%BE%D0%BD%D1%84%D0%B5%D1%80%D0%B5%D0%BD%D1%86%D0%B8%D1%8F-%D0%B3%D0%BE%D1%81%D1%83%D0%B4%D0%B0%D1%80%D1%81%D1%82%D0%B2%D0%B5%D0%BD%D0%BD%D0%BE%D0%B3%D0%BE/> (accessed August 28, 2020).

<sup>119</sup> Online interview with Tolik Gadamamadov, Director and Lecturer at the Khorog Film School (August 16, 2020).

In addition to the above-mentioned studios, dozens of private studios exist across the country, often amateur and specializing in the production of music videos, commercials, and genre films. It is worth noting that only 14 film studios are officially licensed to produce audio-visual content<sup>120</sup>.

The *Sinamo* (*taj. Cinema*) Television represents yet another notable video content producer. It was established in 2015 after the national government drew attention to the overall state of filmmaking in the country. The SE is engaged in the production of feature, documentary and animated films, yet does not have an independent state budget (unlike the Tochikfilm SE), and is allocated money for filmmaking purposes under the Television and Radio Development Program of the RT (2020).

Several organizations operate in the country directly implementing programs in the field of culture, art and video journalism: Open Society Institute Assistance Foundation – Tajikistan (Arts and Social Activism Program), Swiss Agency for Development and Cooperation in Tajikistan (Central Asia Art and Culture Programme, CAACP), Internews, United States Agency for International Development, USAID (MediaCAMP Program).

### Cinemas

The 2011–2015 Cinema Development Program of the RT states that in 2010 there were 58 cinemas on the balance sheet of the *Tochikfilm* Cinema and Video SUE<sup>121</sup>. At present, Tochikfilm owns 30 stationary single-hall cinemas with a total of 5,770 designed seats<sup>122</sup>. However, out of 30 cinemas, 9 regional cinemas were officially transferred under the jurisdiction of local executive authorities; 2 cinemas were leased, including 1 cinema (Sitara) in Dushanbe; 8 cinemas require repair and equipment; 8 cinemas are operational and functional<sup>123</sup>. Modern-type cinemas are located only in Dushanbe and are considered private (Navruz 3D Cinema, Kaikhon 3D Multiplex).

Culture Palaces<sup>124</sup> have almost replaced cinemas in the regions, because often they are located in the repaired and converted buildings of former Soviet-type cinemas.

According to the ongoing 2016–2020 State Program for the Development of Cultural Institutions of the RT, in 2016 325 culture palaces and houses, 434 clubs, 57 mobile clubs, 14 cultural and entertainment centers functioned across the nation.

Based on the national-level data on film distribution, in 2019 127 film sessions were held at Tochikfilm cinemas, which were attended by 21,345 spectators, including 16,334 children. The income from film distribution during the same year amounted to TJS 25,730<sup>125</sup> (USD 2,652).

As per the information of the Department for Supervision and Control of Audiovisual Content of the Main Directorate for Film Distribution and Screening, Licensing and Control of Audiovisual

<sup>120</sup> List of state and non-state television, radio and audiovisual production studios operating in accordance with the legislation of the RT (information provided by the Television and Radio Committee).

<sup>121</sup> 2011–2015 Cinema Development Program of the RT approved as per Government Enactment № 572 of October 30, 2010.

<sup>122</sup> Availability and operation of film installations, video halls and video shows. Report on the availability, activity and operation of film installations for 2019 of March 18, 2020 (information provided by the Tochikfilm SE and Agency for Statistics under the President of the RT).

<sup>123</sup> List of cinemas on the Tochikfilm balance sheet and their condition (Materials of the Main Directorate for Film Distribution and Screening, Licensing and Control of Audiovisual Content of the Tochikfilm SE).

<sup>124</sup> Culture Palace(s) – cultural centers with halls for holding concert and theater performances, administrative meetings, film screenings, as well as often a library and rooms for educational, creative and sports clubs.

<sup>125</sup> Availability and operation of film installations, video halls and video shows. Report on the availability, activity and operation of film installations for 2019 of March 18, 2020 (information provided by the Tochikfilm SE and Agency for Statistics under the President of the RT). USD 1 = TJS 9.7 as of March 18, 2020: <https://nbt.tj/ru/kurs/kurs.php?date=18.03.2020> (accessed September 26, 2020).

Works of the Tochikfilm SE, in 2018 21 films were entered into the register, in 2019–43 films, most of which were action TV series and romantic melodramas produced in Russia and Turkey.

Domestically produced films registered by the Tochikfilm SE in 2018–2019 included 6 motion pictures that were released and shown in cities and villages across the country on an individual basis<sup>126</sup>. It deserves noting that the films produced by the Tochikfilm SE are not required to undergo the National Film Registration procedure<sup>127</sup>.

Cinemas do not follow the policy of prioritizing national films in domestic film distribution.

The cost of tickets varies between public and private cinemas.

Domestic private entrepreneurs engaged in film demonstration, copying and the sale of audiovisual content on DVDs, CDs, and memory cards are required to pay annual officially established registration certificate fees<sup>128</sup>.

The registration certificates (with corresponding fees) in the field of distribution and demonstration of audiovisual products include the following:

- Registration certificate for audiovisual content copying (replication) – TJS 5,000;
- Registration certificate for mass film screening – TJS 1,000;
- Registration certificate for the sale of audio visual content and video games – TJS 900.

Since 2018, an alternative distribution trend has been observed in the country, i.e. independent film makers prefer internet-based film release immediately after the completion of production, rather than via cinemas. This approach allows the avoidance of the procedures of expert evaluation and mass screening certification.

The analysis of film distribution development in Tajikistan shows that the gradual privatization of cinemas observed since the mid-2000's has led to the fact that by 2020 only several state cinemas remained in the film industry. Certain cinemas – although nominally listed on the balance sheet of the Tochikfilm SE – in reality were transferred to the jurisdiction of local authorities and used for other purposes.

### Film festivals

- **Didor International Film Festival** – founded in 2004 for screening live-action and short films;
- **Didor International Documentary Film Festival** established as an independent event in 2019;
- During 2016–2018, 3 **Navsoz International Short Meter Festivals** were held. The Festival – a democratic film screening contest for young directors – stopped due to the lack of funding;
- In 2019, the **1<sup>st</sup> International Student Film Festival of the M. Tursunzade Tajik State Institute of Culture and Arts** was held;
- **National Documentary Film Festival** was held over the past few years by the Sinamo Television SE.

<sup>126</sup> Personal interview with Akbar Sharipov, Head of the Department for Supervision and Control of Audiovisual Content of the Main Directorate for Film Distribution and Screening, Licensing and Control of Audiovisual Works of the Tochikfilm SE (July 23, 2020).

<sup>127</sup> *Idem.*

<sup>128</sup> Tochikfilm SE Service Fees of June 22, 2018, approved by the Decision of the Antimonopoly Service under the Government of the RT of June 25, 2018 (information provided by Tochikfilm Studio).

Since 2005, state budget allocation for the film industry has been carried out in accordance with 5-year cinema development programs.

In September 2017, the ongoing 2018–2020 Cinema Development Program of the RT was adopted with the account that the Tajikfilm Film Studio and Tochikfilm operated under the auspices of the Television and Radio Committee under the Government of Tajikistan – the fact that influenced coordination of activities in the film industry, allocation of state funds for the development of film production and cinema networks, as well as scholarships for training filming personnel.

The ongoing 2018–2020 Cinema Development Program of the RT recognizes national cinema as a socio-cultural institution significantly influencing the formation of popular self-consciousness, and identifies the following areas of film production of the Tochikfilm SE: creation of modern feature and documentary films objectively reflecting the past and present, relevant issues and challenges of modern society, and promoting high morality and good traditions of the Tajik people (Art. 1). Characterizing the overall state of Tajikistan's film industry as of 2017, the Program acknowledges the lack of state funding not capable of meeting current needs of the sector requiring large-scale investment. The wide-spread practice of home and internet movie watching has caused poor cinema attendance. Over 70% of the country's population<sup>129</sup> live in rural areas, yet the majority of settlements lack public facilities with cinema halls fitted with modern digital film screening equipment (Art. 2). According to the current Program Tajikfilm needs 36 additional specialists<sup>130</sup>. The action plan to implement the 2018–2022 Cinema Development Program of the RT<sup>131</sup> makes it clear that the purchase of filming and cinema equipment, as well as training of the corresponding personnel shall be provided through the provision of extrabudgetary funds.

The Program's state funding amounts to TJS 15 mln (USD 1,704,545) for Tochikfilm SE, including TJS 9,285,000 (USD 1,055,113) for film production<sup>132</sup>. The Program also determines the number of films to be produced (36), including 8 feature films, 9 documentaries, 7 short live-action films, 7 animated films, and 5 animated series from extrabudgetary funds<sup>133</sup>.

**Fig. 8. Comparison of planned state funding for cinematography and culture**

Annual budget	2018	2019	2020 (planned)	5-year Program budget
Tochikfilm SE	<b>TJS 3,751,000</b> (USD 426,2)	<b>TJS 3,487,000</b> (USD 396,2)	<b>TJS 3,259,000</b> (USD 370,3 as per 2017 exchange rate and USD 316,4 as per 2020 exchange rate)	<b>TJS 15,000,000</b> (USD 1,704,545)
Ministry of Culture of the RT	<b>TJS 1,900,000</b> (USD 243,6 <sup>134</sup> )	<b>TJS 1,500,000</b> (USD 192,3)	<b>TJS 1,550,000</b> (USD 198,7)	<b>TJS 6,615,000</b> (USD 848)

To compare the state budget shares allocated for the development of filmmaking and culture, it appears reasonable to cite the data of the State Program for the Development of Television and Radio in Tajikistan adopted on July 30, 2020. As per the Program, the Government plans to

<sup>129</sup> More precisely, 73.7% of Tajikistan's population was rural, and 26.3% was urban (as of 2018). Share of urban and rural population in the total population. Regions of the Republic of Tajikistan-2019. Agency for Statistics under the President of the RT, 2019, p. 33.

<sup>130</sup> 2018–2022 Cinema Development Program of the RT approved as per Government Enactment № 457 of September 29, 2017.

<sup>131</sup> Action plan for the implementation of the 2018–2022 Cinema Development Program of the RT. Annex 2 to Enactment of the Government of the RT № 457 of September 29, 2017.

<sup>132</sup> 2018–2022 Cinema Development Program of the RT approved as per Government Enactment № 457 of September 29, 2017.

<sup>133</sup> *Idem*.

<sup>134</sup> Exchange rate = USD 1/TJS 7.8 (as of February 9, 2016). Available at: <https://nbt.tj/ru/kurs/kurs.php?date=30.07.2020> (accessed September 26, 2020).

allocate TJS 25,273,120 for this purpose from the national budget, as well as use TJS 11,865,800 from the internal funds of the TV and Radio Committee<sup>135</sup>. Comparative analysis of the funding volumes suggests that state support of media (TV and radio) development is a priority of Tajikistan's socio-cultural policy.

The planned expenses for culture development to be covered from the budgets of local executive authorities<sup>136</sup>, including for the repair and construction of culture palaces, are of potential interest from the point of view of the possible enhancement of film distribution.

Sources of financing of film production in Tajikistan:

- Bank loans;
- Own investments;
- Public funding allocated to the directors of the Tochikfilm SE or co-production projects;
- Television subsidies for domestically produced films planned for aTV premiere;
- Sponsorship and partnership with private companies (mobile communication companies, TV and radio companies, food industry enterprises, lottery companies, shops, taxi services, banks);
- Grants from international organizations for film education and production as part of it;
- Grants from foreign embassies accredited in Tajikistan.

According to Sadullo Rakhimov, a film critic, during 1991–2006, Tajikistan's (state and non-state studios, film footage and video) filmmakers produced 35 feature films (full-length, short meter, TV series), approx. 151 documentary and popular science films, and 8 animated films. There are no official statistics on the quantity of domestic films produced later on.

### 3.4. Institutional capacity, including existing specialized educational and training institutions, programs and schools

In Tajikistan, film industry education is regulated by the *Law on Education* (2013). As mentioned earlier, the execution of educational activities – specifically, higher and additional education – in the country is subject to licensing, state certification and accreditation by the Ministry of Education (Art. 29, 30). The Law governs employment by state institutions of university graduates whose studies, either in Tajikistan or abroad, have been financed by the state within the framework of state-sponsored education<sup>137</sup>.

The current National Strategy for the Development of Education until 2020 (2012) is the policy document also governing the educational sector.

At present, Tajikistan is implementing its 2016–2020 State Program for Providing Specialists with Higher Vocational Education. Under the Program, a General Admission Plan (covered from the state budget and contract-based) to higher vocational education institutions inside and outside the country is currently under development based on the request of ministries and other state agencies<sup>138</sup>.

<sup>135</sup> Plan for the implementation of the 2021–2025 State Program for the Development of Television and Radio in the RT. Annex 2 to Enactment of the Government of the RT № 429 of July 30, 2020.

<sup>136</sup> Action plan for the implementation of the 2016–2020 State Program for the Development of Cultural Institutions of the RT. Annex 2 to the 2016–2020 State Program for the Development of Cultural Institutions approved as per Enactment of the Government of the RT № 53 of February 9, 2016.

<sup>137</sup> Law on Education № 1004 of July 22, 2013 (as amended by Law № 1527 of May 17, 2018).

<sup>138</sup> 2016–2020 State Program for Providing Specialists with Higher Vocational Education, approved as per Enactment of the Government of the RT № 144 of March 31, 2016.

At the beginning of the 2019–2020 academic year, 4,686 students were enrolled in educational institutions specializing in culture and art<sup>139</sup>.

Tajikistan's Programs for Cinematography Development provide for the training of film industry personnel in foreign educational institutions, not only through quotas from foreign countries, but also through the ongoing *Durakhshandagon International Scholarship of the President of the RT* (2008)<sup>140</sup> that replaced the *Regulation on the higher education training of specialists in foreign countries* (2003)<sup>141</sup>.

The Durakhshandagon Scholarship pays for professional university education in foreign countries for specialists, bachelors, masters, candidates of science, and PhDs from the Special Fund of the President of Tajikistan. The Scholarship is awarded annually on a competitive basis and is supervised by the Ministry of Education, Center for International Programs SE and Ministry of Foreign Affairs<sup>142</sup>. A scholarship holder signs an agreement according to which, after completing his/her studies, he/she is obliged to work for 5 years at a state agency in Tajikistan. State executive organizations are obliged to provide the alumni with jobs and suitable working conditions (Art. 6, 12–14)<sup>143</sup>.

Educational institutions supervised by the Ministry of Culture of Tajikistan include the following:

**1) Talabhudzhii Sattorov Tajik National Conservatory (SE).** Since no specialized training in film sound engineering is provided anywhere else in the country, the Conservatory's School of Pop Music Recording has at Sound Engineering Department. In 2020, 3 specialists of the Tajikfilm SE – whose professional work is related to sound and music – started their higher and second higher education at the Department. According to S. Aliyeva, Head of the Sound Engineering Department, 15–16 students are admitted to the department every year. Based on the 2018–2019 academic year statistics, 2 women finished their intramural studies, 1 woman finished her full-time studies at the Department. As of today, the total number of Department students (42) includes 2 females.

**2) Mirzo Tursunzade Tajik State Institute of Culture and Arts State Educational Establishment (SEE).** Based on the 2020 statistics, 10 men and 1 woman are undergoing their 3<sup>rd</sup>-year studies at the Department of Feature Film Directing. In 2020, 22 applicants, including 3 women, were enrolled to filmmaking majors<sup>144</sup>. In 2019, the World Bank supported a project of the Tajik State Institute of Culture and Arts with a grant to establish a training video-editing laboratory and acquire filming equipment<sup>145</sup>;

**3) Institute of Fine Arts and Design of Tajikistan (SE of Higher Professional Education);**

**4) Partov Buydokov Republican College of Culture (SE);**

**5) Akhmad Bobokulov College of Arts in Dushanbe (SE).**

<sup>139</sup> Number of students by sectoral specialization of institutions (at the beginning of the academic year). Education in the Republic of Tajikistan. Agency for Statistics under the President of the RT, 2020, p. 71.

<sup>140</sup> Decree of the President of the RT № 502 *On the establishment of the Durakhshandagon International Scholarship of the President of the Republic of Tajikistan* of August 2, 2008.

<sup>141</sup> Enactment of the Government of the RT № 420 *On the higher education training of specialists in foreign countries* of November 4, 2002; Enactment of the Government of the RT № 112 of March 31, 2003 *On approving the Regulation on the higher education training of specialists in foreign countries*.

<sup>142</sup> Enactment of the Government of the RT № 208 *On approving the Provisions of the Durakhshandagon International Scholarship of the President of the RT* of April 2, 2009.

<sup>143</sup> *Idem*.

<sup>144</sup> Personal interview with Mahmadali Sangov, Associate Professor, Head of the Directing and Production Department of M. Tursunzade Tajik State Institute of Culture and Arts (August 6, 2020).

<sup>145</sup> *Idem*.

Other universities offering disciplines related to audiovisual culture are also worth mentioning. For instance, the courses “Visual Culture”<sup>146</sup>, “Media Culture: Theories, Practices, Technologies”<sup>147</sup> were introduced into the curriculum of the Department of Cultural Studies of the Russian-Tajik (Slavic) University.

At the Department of Painting and Sculpture – operating since 2015 – the Institute of Fine Arts and Design of Tajikistan opened the Department of Film Artwork, admission to which is more periodic than ongoing. The training plan includes such special disciplines as film artwork, video shooting and scene editing, modern art (photo and video art), stage lighting equipment and technology, cinema and television decoration technology, breadboarding, art design and scenography<sup>148</sup>.

Multiple university-based journalism departments have training television and radio studios, which self-motivated students use for independent hands-on mastering of the basics of video and audio editing as well as interview camera skills, and produce video reports about university life and story films.

In August 2016, the School of Young Filmmakers offering short basic cinematography courses opened at the Tajikfilm Studio. It became the first official filmmaking school in the country since gaining sovereignty that was accredited by the Ministry of Education of the RT, licensed to conduct educational activities, and entitled to issue graduation certificates. Prior to the restructuring of the Tajikfilm Studio in 2017, the Filmmaking School had released 1 cohort of 14 students<sup>149</sup>, 4 of which entered – including 3 as per the quota and 1 under the Durakhshandagon Scholarship – VGIK and the St. Petersburg State Institute of Cinema and Television, and another 2 were hired by the Tochikfilm SE.

### 3.5. Main challenges, issues and significant gaps impeding the development of culture industries, in particular the film industry

Based on the regional report, that included interviewing various representatives of the film industry, the following sector-specific issues require attention and solutions:

#### Film industry financing

The respondents noted the need to revise the funding items under the current Cinematography Development Program, and allocate budget funds for purchasing professional film screening and sound equipment in order to upgrade old-type cinemas, etc. There is also a shortage of funding for the promotion of Tajik films to the audience, namely: cinema periodicals are lacking; poor film advertising; and limited resources for holding film festivals to present domestically produced films.

<sup>146</sup> Distribution of competencies. Undergraduate curriculum. Field Code 51.03.01, training beginning – year 2019. Available at: <http://www.rtsu.tj/ru/faculties/fakultet-istorii-i-mezhdunarodnykh-otnosheniy/kafedry/kafedra-kulturologiya-pedagogika-i-psikhologiya/51-03-01-kulturologiya-vysshee-obrazovanie-bakalavriat/Матрица%202019.pdf> (accessed August 27, 2020).

<sup>147</sup> Matrix of competencies in the field 51.03.01 “Culture Studies”, “Applied Culture Studies”. Available at: <http://www.rtsu.tj/ru/faculties/fakultet-istorii-i-mezhdunarodnykh-otnosheniy/kafedry/kafedra-kulturologiya-pedagogika-i-psikhologiya/51-03-01-kulturologiya-vysshee-obrazovanie-bakalavriat/Матрица%20компетенций%20по%20направлению%2051.04.01.pdf> (accessed August 27, 2020).

<sup>148</sup> Department of Painting and Sculpture. State Institute of Fine Arts and Design of Tajikistan. Available at: <http://ddstdt.tj/fakultai-sanati-tasvir/kafedra-o/kafedrai-musavviriy-va-haykalтарошй/> (accessed August 28, 2020).

<sup>149</sup> Graduates of the School of Young Filmmakers of the Tajikfilm Studio awarded diplomas (July 1, 2017). Available at: <https://www.asiaplustj.info/ru/news/life/culture/20170701/v-dushanbe-sostoitsya-tseremoniya-vrucheniya-sertifikatov-shkoli-molodih-kinematografistov-gosudarstvennoi-kinostudii-tadzhikfilm>

## Legal framework

The film industry is regulated only by the Law on Cinema and the current Cinematography Development Program in the absence of corresponding statutes and regulations. The Law on Cinema does not set out a taxation mechanism.

## Licensing

Licensing restrictions with respect to film creation and public demonstration prevent the development of a domestic film industry. A small number of studios officially licensed to produce audiovisual content (only 14<sup>150</sup>) adversely affects the quantity of films produced.

## Copyright

It is necessary to develop a new law on copyright and related rights to reflect the realities of the domestic film production and filmmaking market, as well as to forge mechanisms to protect filmmaker copyright – starting with the official registration of screenplays. At present, authors of musical works have more rights than producers or filmmakers. Copyright in the field of screenwriting, TV broadcasting of film works and use of their re-compiled episodes (events), frames, music in a new audiovisual product without reference to authorship, as well as anti video piracy measures, require due enforcement and monitoring. Unauthorized screening of old and new films by the Tochikfilm on domestic television is observed, while TV channels are required to buy the right to show them on TV. There is a need to establish cooperation between the Tochikfilm SE and Television and Radio Committee supervising domestic TV channels.

## International agreements

The Tochikfilm SE's film production service contracts are inconsistent with international standards. As a result, the contracts cannot specify and protect the copyright and related rights of filmmakers rendering services, i.e. contracts stipulate only the rights of service customers/clients<sup>151</sup>. This complicates attracting foreign specialists to filmmaking projects.

## Material and technical base

The respondents pointed to the insufficient rate of renewal of industry infrastructure and facilities, and strengthening the material and technical base of culture-related institutions; as well as the privatization of buildings and the property of culture-related institutions (e.g. cinemas) – that were previously on the balance sheets of disbanded collective and soviet farms – and late certification of the corresponding land plots and property by local culture departments (Art. 18)<sup>152</sup>; and delays in the construction of regional-level culture facilities.

## Professional personnel and specialized education

Insufficient attention is paid to training in the field of art, including cinema. Setting up short-term professional courses with the invitation of foreign masters to Tajikistan is of great relevance. The interviewees likewise stated the need for centralized film education in the form of a permanent academy of cinematography or film institute with departments specializing in various filmmaking aspects. The absence of a designated technical base (facilities) for students of film-related departments to conduct individual practical classes and create student films was especially noted. The issue of financing student work is an important factor influencing filmmaking student dropout – currently, they are forced to use their own financial means to create their final qualification artwork. The issue of training in foreign countries can be addressed via allocation

<sup>150</sup> List of state and non-state television, radio and audiovisual production studios operating in accordance with the legislation of the RT (information of the Television and Radio Committee).

<sup>151</sup> Personal interview with Faizullo Fayz, Director of Tochikfilm SE (July 1, 2020).

<sup>152</sup> 2016–2020 State Program for the Development of Culture Institutions, approved as per Enactment of the Government of the RT № 53 of February 9, 2016.

of Durakhshandagon scholarships for cinema-related majors, as well as coordinating with the national Ministry of Economic Development and Trade, Ministry of Education, Center for International Programs State Institution, Ministry of Foreign Affairs.

### Production of animated films

The state does not participate in the production of animated film content, and business entities use animation only for advertising purposes, due to which animated films are not commercialized and/or distributed.

### Quality of scenarios

Over the past decade, Tajikistan's cinema – as was noted by many filmmakers and leaders of filmmaking agencies – has been experiencing an artistic crisis associated with the lack of professional and interesting film scripts<sup>153</sup>. The emergence of this “scenario crisis” can be explained by thematic restrictions entailing state (procurement) order and budget financing, i.e. the need for the outcome to comply with the state customer's expectations<sup>154</sup>.

### Cinemas and film distribution

The number of cinemas in the provinces is insufficient. Budget funds for restoring old cinemas and purchasing professional film projection and sound equipment are lacking. The rights of national films (quantity and daytime of screenings – morning, afternoon, evening) are not prescribed in agreements signed with international distribution companies to fix film distribution quotas for domestic films at multi-hall cinemas across the country. The promotion of Tajik films in film distribution is associated with at lack of preliminary planning of cultural and leisure activities of local communities with the account of demographic indicators, employment of the population, financial standing, nature of employment and amount of free time – which can be potentially devoted to a movie – and, accordingly, the lack of ability to forecast audience interest.

### Film archive

The autonomous film organization responsible for storing films produced by the Tochikfilm SE and films by independent producers – in accordance with the State Film Registry stipulated by the Law on Cinema (2004) lacks a centralized modern-equipped film archive that would allow proper arrangement and cataloguing of films, as well as streamlining film statistics. In reality, only pictures of own and joint production are mandatory for depositing at the Tochikfilm archive. Tajikistan likewise lacks professional modern film scanning equipment in order to create digital copies of the film heritage without losing quality.

### Statistical accounting

Annual statistics of the number of films produced in the country, including those produced by existing non-state studios, are not maintained. Due to the fact that for over 20 years cinematography has not been within the competence of the Ministry of Culture, detailed film statistics (both public and private) are almost not submitted to the Statistics Agency under the President of the RT and, thus not reflected in its publications on the socio-cultural development of the country. This lack of awareness and analysis prevents domestic filmmakers from identifying their potential viewers.

<sup>153</sup> Head of the TV and Radio Committee is confident in the future of Tajik cinema (July 14, 2017). Available at: <http://avesta.tj/2017/07/14/glava-komitete-tv-i-radio-uveren-v-razvitii-tadzhikskogo-kino/>

<sup>154</sup> Head of the State Television and Radio of the RT: sex scenes in movies defame our national values (February 07, 2019). Available at: <https://rus.ozodi.org/a/29756496.html> (accessed September 3, 2020).

## 04. OVERVIEW OF THE STATE OF THE FILM INDUSTRY IN THE REPUBLIC OF UZBEKISTAN



Shooting of the movie "Two Thousand Songs of Farida". © Talgat Gimranov

### 4.1. Brief historical survey of the film industry and its development

The first film demonstration in Uzbekistan took place in Tashkent in 1897, but national cinematography only emerged after the October Revolution. In a short time, in the cities of Turkestan, especially in Tashkent, a large number of stationary premises for film screenings appeared. During 1912–1914, there were about 15 cinemas but only in Tashkent. At the end of 1920, film distribution offices that had previously existed in the Turkestan Territory were nationalized. On February 13, 1924, the Government of the Bukhara People's Soviet Republic adopted the resolution on establishing its own film production, and turned to Russian film organizations for help – as the result the Bukhokino (*rus. Bukhara Film*) Russian-Bukhara Partnership was created. The same year, jointly with the Sevzapkino (*rus. Northwestern Film*) Leningrad Film Studio it released its first feature film. In 1925, the Uzbgoskino (*rus. Uzbekistan State Cinema*) Trust was organized and the Shark Yulduzi Film Factory opened. It was the first production film studio in all of Central Asia (in 1958 it was renamed to the Uzbekfilm Film Studio) that launched the production of the Uzbgoskino Film Chronicles and popular science films with various themes. The movie "The Rise" (1931) directed by Nabi Ganiyev marked the formal beginning of the Uzbek national cinematography. During the first half of the 1930's, the first historical motion picture and the first children's film was created. In 1937, the first sound film "The Oath" was screened (directed by V. Usoltsev). During the Great Patriotic War, multiple film studios were evacuated to Uzbekistan from Moscow, Leningrad and Kiev.

In 1959, Uzbek cinematographers moved to the new Uzbekfilm Studio building, where the representatives of the new generation of filmmakers quickly announced themselves next to their mature colleagues. The 1960's were characterized by a gradual increase in feature film production, expansion of their genre-stylistic spectrum, and a more intensive appeal to then modern issues. In 1960, undoubtedly popular (folk) film appeared – the "All Mahalla Is Talking About It" comedy by director Shukhrat Abbasov, certain episodes and songs from which passed into vernacular folklore. In the 1960's, many historical films were created, and children's cinema demonstrated intensive development. Women only began to shoot documentary, animated and feature films in the mid-60's. The 1970's witnessed the first co-productions jointly with foreign film studios (Bulgaria, Yugoslavia, and India). In the late 70's and early 80's, Uzbekfilm

annually shot 10–12 feature films and dubbed 65 more motion pictures. One of the main trends determining the development of domestic cinematography during that period was the attempt to bring film art closer to the wider public.

Another important feature of Uzbekistan's filmmaking in the 1970–1980's was the International Film Festival of Asia, Africa and Latin America – held every 2 years in Tashkent since 1968. The festival took place under the auspices of the Goskino of the USSR and Union of Filmmakers of the USSR with the participation of the Goskino of the Ukrainian SSR and Union of Cinematographers of Uzbekistan. It originated as a forum of filmmakers from Asia and Africa, but since 1976 – when Latin American representatives took part in it for the first time – it has become a festival of three continents. Thus, in 1968 filmmakers from 49 Asian and African countries gathered at the 1<sup>st</sup> International Tashkent Film Festival, and in 1980 the number of participating countries grew to 97. In different years, the total number of films shown during the festival varied from 80 to 200.

Whereas in the middle of the 20<sup>th</sup> century, films by Uzbek film directors leaned more towards realistic trends and a positive assessment of reality, in the late 1980's, with the transformation of the socio-political structure of society, several films appeared describing negative phenomena, both spiritual and social. Yet, with all its achievements Uzbekistan's feature filmmaking was extremely limited in its creative expression means due to ideological censorship. Domestic cinematography from the second half of the 1980's and early 1990's appears controversial and complex.

The 90's period can be conditionally divided into three parts. The first is the late 80's and early 90's – the so-called “post-perestroika cinema” – focusing on the topics forbidden in Soviet-time cinematography, and forming new visual aesthetics. The second – the mid-90's – is characterized by returning to the historical genre, as well as a decline in artistic and production quality. The third period – the late 90's – marks the revival of Uzbek cinema. On April 29, 1996, as per the Decree of the President of the RUz, the *Uzbekkino* (Uzbekfilm) State Joint-Stock Company was established, and on July 12 of the same year, the Cabinet of Ministers approved its official structure.

According to various sources, from 1990 to 2001 approx. 75 to 80 feature films were shot in Uzbekistan, including only 2–3 short meter. Of these, only 7–8 pictures were shown outside Uzbekistan within the framework of international film festivals or retrospective programs<sup>155</sup>. The transition to a market economy in the course of the 2000's gave rise to private film studios, and the so-called spectator or commercial feature filmmaking appeared. It developed in parallel with the amateur cinematography represented mainly by films created under the state order.

## 4.2. Brief review of national film industry related legislation

With independence, the need for state regulation of domestic filmmaking was fully realized and embodied in a series of government decisions.

During that period, the state assisted the industry and initiated its wide support. Since 1992, a number of government decrees/enactments have been adopted. For instance, the State Filmmaking Company of the Republic of Uzbekistan was established as per the Decree of the President of the RUz *On the Creation of State Filmmaking Company of the Republic of Uzbekistan* and Decree of the Cabinet of Ministers of the RUz of May 6, 1992 with the aim of further developing national cinema. Later, the Decree of the President of the RUz *On the Creation of Uzbekfilm State-Owned Company* of April 29, 1996 and Decree of the Cabinet of Ministers of the RUz stipulated the establishment of the *Uzbekkino* State JSC. The beginning of the new phase

<sup>155</sup> Cinema of Central Asia (1990–2001) by Abikeyeva, G.O. Almaty, 2001, p. 187.

of development of the national cinema was inaugurated by the next strategically important step – in accordance with the Decree of the President of the RUz *On Enhancing Management in the Field of Cinematography* of March 16, 2004 and the corresponding Decree of the Cabinet of Ministers of the RUz of March 17, 2004, the Uzbekfilm State JSC was transformed into the Uzbekfilm National Agency (NA).

In August 2017, another Presidential Decree was adopted to ensure support of Uzbekistan's cinematography; and a lot of work was carried out to establish the corresponding mechanisms and draft by-laws.

As of today, filmmaking in Uzbekistan is regulated by the following statutes and regulations:

**1) Decree of the President of the RUz On Measures for Further Development of National Cinematography of August 7, 2017<sup>156</sup>** that manifested a decisive step in coordinating the general legal principles in cinematography and related fields, allowing the establishment of a single holistic legal framework governing the complex of industry-specific relations. The document recognized the negative impact that imperfect film industry regulations, the physical and moral obsolescence of designated facilities and infrastructure of leading filmmaking enterprises, in particular, the Uzbekfilm, Karakalpakfilm and Popular Science and Documentaries Film Studios, as well the gap between allocated financing and current imperatives, and the lack of cinemas impose on the sector. To cope with the situation, the Creative Union of Film Workers, as well as the Fund for the Development of National Cinematography were to be established under the Uzbekfilm NA. The Decree also stated that since 2018, Uzbekfilm would produce 20 full-length feature films annually under the state procurement (order) system, and starting in 2020, their number should increase up to 30. In 2019, 25/50 documentary, popular science, educational and methodological films, film almanacs, and film digests were to be produced, and starting in 2020–30/60 parts. In addition, the number of cartoons released annually by the agency starting in 2022 should be 50. The Decree paid special attention to youth engagement – according to it, novice film workers would be entrusted with short-meter filming (total of 10 hours), and children's humor film magazines. All motion pictures produced would be subject to dubbing in foreign languages to promote them in the global market and be shown at festivals.

The Decree also stipulates the establishment of regional (provincial) cultural and entertainment complexes under the Uzbekfilm NA. They will house small-scale film studios and new-format cinema halls. For this purpose, youth centers available in the regions, lyceum and college buildings, as well as community culture and leisure centers shall be used. As per the Decree, designated complexes will be built for film screening, and suitable conditions for rendering cultural services to the population, especially young people, shall be created. The document also provides for the creation of a film network infrastructure, commissioning of new cinemas not only in large cities, but also in constituencies; upgrading the domestic film industry infrastructure, as the most important element of social life and the basis of Uzbekistan's national culture policy.

**2) Regulation On Licensing of Types of Activities for Production, Dubbing and Screening of Audiovisual Works**, approved as per Resolution № 72 of the Cabinet of Ministers of March 15, 2012<sup>157</sup>;

**3) Enactment № 169 of the Cabinet of Ministers of the RUz On the Procedure for Film and Video Recording by Foreign Filmmaking Companies in the Territory of the Republic of Uzbekistan** of June 12, 2012.

<sup>156</sup> <https://lex.uz/docs/3298088>

<sup>157</sup> [https://buxgalter.uz/uz/doc?id=418417\\_polojenie\\_o\\_licenzirovanii\\_vidov\\_deyatelnosti\\_po\\_izgotovleniyu\\_dublirovaniyu\\_i\\_demonstracii\\_na\\_ekrane\\_audiovizualnyh\\_proizvedeniy\\_\(prilozhenie\\_n\\_2\\_k\\_postanovleniyu\\_km\\_ruz\\_ot\\_15\\_03\\_2012\\_g\\_n\\_72\)&prodid=1\\_vse\\_zakonodatelstvo\\_uzbekistana](https://buxgalter.uz/uz/doc?id=418417_polojenie_o_licenzirovanii_vidov_deyatelnosti_po_izgotovleniyu_dublirovaniyu_i_demonstracii_na_ekrane_audiovizualnyh_proizvedeniy_(prilozhenie_n_2_k_postanovleniyu_km_ruz_ot_15_03_2012_g_n_72)&prodid=1_vse_zakonodatelstvo_uzbekistana)

Currently, the following types of state support for filmmaking are present in Uzbekistan:

- Subsidizing film and video production;
- Consulting at all stages of film projects;
- Assistance at the distribution phase;
- Holding of film festivals.

Multiple national TV channels have movie sections.

Depending on the degree of state participation, three financing models can be distinguished as to film industry development regulation: public, private (business organizations) and mixed.

In Uzbekistan, the policy of preserving national identity predetermines the priority of state regulation over market economy requirements. It is characterized by a comprehensive approach clearly reflected in domestic legislation. In this context, considerable attention is paid to the role of television and cinematography as the most influential mass channels for the formation and dissemination of public ideas about national culture and national character.

### 4.3. Key film industry organizations, principles of their operation and interaction. Film fora

**I) Uzbekkino National Agency** is the organization implementing the state policy in the sphere of cinema, filmmaking and video production.

Based on Presidential Decree № UP-360 of 9 March 1992 and Enactment of the Cabinet of Ministers № 214 of 6 May 1992, the Uzgoskinokompaniya (*rus. State Film Company of the Republic of Uzbekistan*) was established, and the film industry was removed from the authority of the Ministry of Culture of Uzbekistan. Further, as per Decree of the President of the RUz of April 29, 1996 and Enactment № 247 of the Cabinet of Ministers of the RUz of July 12, 1996, the State Film Company of the Republic of Uzbekistan and Union of Filmmakers were transformed into the Uzbekkino (*rus. Uzbekfilm*) State Joint Stock Company. In accordance with Decree of the President of the RUz № PF-3407 of March 16, 2004 and Enactment № 126 of the Cabinet of Ministers of the RUz of March 17, 2004, the Uzbekfilm State JSC was transformed into the Uzbekfilm National Agency.

One of the Agency's main tasks is to designate priorities in the development of national cinematography and assist in film production in Uzbekistan, in addition to the following:

- Supporting film studios and enterprises, regardless of ownership, creative teams, as well as protecting their interests, creating favorable conditions for the development of entrepreneurship and competitive environment in the field of filmmaking;
- Bringing up talented young filmmakers, assisting them in the realization of their creative potential for consistent enrichment and development of the best traditions of national movie making;
- Organizing the work of the Uzbekistan State Film Fund in accordance with modern requirements;
- Improving and technically re-equipping the system of film production and distribution on a competitive basis, as well as enhancing the quality of film and video services rendered to the population;
- Implementing necessary measures to prevent illegal import, use, rental and distribution of copyrighted film and video content in the territory of the Republic;
- Conducting expert assessment of imported and exported film and video products, as well as developing rules for distribution and technical use of motion pictures and video films;

- Advancing international cooperation in the field of cinematography, as well as representing national film works in the world market, expanding networking with foreign film producers and filmmakers, and demonstrating national film art at international film festivals.

The Agency has established production parameters as to the quantity (15 full-length feature films and 20 documentary and popular science films consisting of 40 parts; 10 animated films; and 60 hours of spiritual-educational and educational-methodological videos) annually financed from the state budget<sup>158</sup>.

The Uzbekfilm NA is the only state organization issuing filming permits for foreign film companies in the territory of Uzbekistan.

The National Film Commission of Uzbekistan<sup>159</sup>, established in 2017 as per Presidential Decree *On Additional Measures for Development of the National Film Industry*, responsible for the development of film tourism, providing organizational, production and technical assistance to foreign film companies in the production of film works in Uzbekistan, as well as for promoting domestic filmmaking locations outside the country. The National Film Commission is a full member of ACFI (Association of Film Commissions International) and AFCNet (Asian Film Commissions Network), as well as closely cooperating with the State Committee for the Development of Tourism of Uzbekistan, Youth Union of Uzbekistan, Ministry of Foreign Affairs and Center for Cinematography Development of Uzbekistan.

The following organizations, also integral elements of the industry, are subordinate to the Uzbekfilm National Agency: Uzbekfilm SUE (State Unitary Enterprise), Documentary and Newsreel Film Studio SUE, Animated Film Studio SUE, Republican Center for Film Distribution SUE, Republican Film Fund SUE, Youth Creative Experimental Studio SUE, Karakalpakfilm SUE, Karakalpakfilm Agency, Center for Retraining and Advanced Training of Film Industry Workers SUE, etc.

2) The country's main filmmaking studio – **Uzbekfilm** – was established on July 1, 1925 as the Shark Yulduzi Film Studio. On November 22, 1941, it was renamed the Tashkent Feature FilmStudio, and once again in the mid-50's – the Uzbekfilm Studio. Since January 23, 1992, it has been transformed into the Uzbekfilm Lease Holding Company. The studio is mainly engaged in film production, dubbing and duplication. It has studio stages (pavilions) and occupies an area of 9.4 hectares.

In its premises, the Uzbekfilm Studio likewise hosts the Popular Science Documentary Film Studio, founded in 1932 based on the Newsreel Unit of the Uzbekfilm Studio.

During 2012–2017, over UZS 44.0 bln of state budget fund were allocated for film production, which allowed the production of 56 feature and 21 animated films, as well as 190 documentaries<sup>160</sup>.

By the late 1990's and early 2000's, a rapid growth in domestic film production was observed. Transition to a market economy led to the emergence of private live-action cinematography with spectator demand as the key factor of commercial success.

As of 2019, 357<sup>161</sup> private business entities in the country possessed the necessary licenses for production, dubbing and demonstration of audiovisual content.

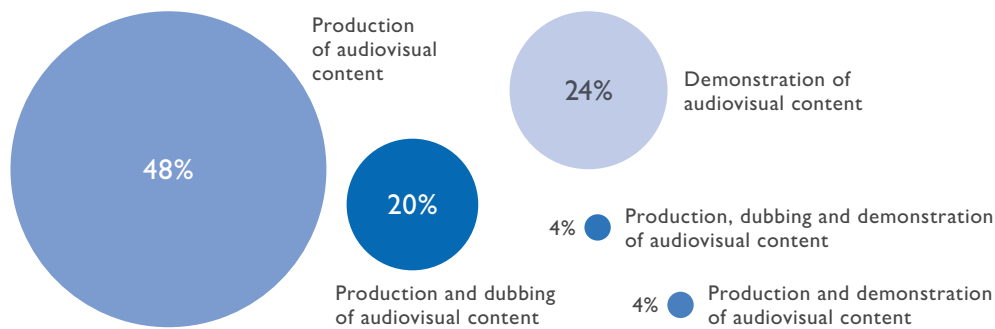
<sup>158</sup> <http://uzbekkino.uz/about.html>

<sup>159</sup> <https://uzbekistanfilmcommission.com/en/>

<sup>160</sup> Karimova, N. (2019). Uzbekistan's film industry and its contribution to the socio-economic development of the country: Monograph. Tashkent: *Baktria Press*, 2019, p. 58.

<sup>161</sup> *Idem*

**Fig. 9. Business entities licensed for production, dubbing and demonstration of audiovisual works (as of January 2017)<sup>162</sup>**



Today, Uzbekistan's market-forming private studios include the following so-called majors: Fox Music Cinema, DavrS, Shayhontohur Film, Panorama FOX, HD Cinema, Artcreator Cinema, etc. A number of official audiovisual distribution chains have also occupied their niche: Muvadvideo LLC, CD-Profi LLC, DISCOVERY Company and CINEMA.UZ LLC group of companies.

Whereas over the past 5 years state budget allocations have allowed the production over 60 feature films, independent and commercial entities have produced over 200 motion pictures<sup>163</sup>.

Over the years of independence, Uzbekistan's feature filmmaking has in a sense evolutionized. Initially, it had an ideological and artistic agenda and followed the philosophy of debunking Soviet myths. Subsequently, the initial acute social and critical impulse gradually faded away, and the ethno-film focus started becoming more prevalent.

As of today, Uzbekistan's film industry can be distinguished as fully formed and involves filmmakers, film distributors and viewers. All researchers note a phenomenon of Uzbek cinema – a significant cinema audience attending particularly local film screenings.

Two types of film networks operate currently in the country – commercial (digital cinema halls with cutting-edge sound equipment and soft chairs) and DVD-based video halls. Film screening companies, depending on their form of incorporation, are regulated as per a legally established classification. The Kino Olami Company represents the only major player in Uzbekistan's film screening market, also acting as an intermediary between distributors and independent local film demonstration venues<sup>164</sup>.

The current state of the domestic film screening market is witnessing dynamic change. For instance, in 2000–2017 the number of cinema halls increased 2–3 fold due to the appearance of shopping and entertainment complexes with integrated cinemas.

Domestic release has become truly national – over 60% of the films shown in cinemas are created by Uzbekistan directors, and mainly by private studios. With 30–50 films produced per year, up to now only 10 of them were state financed<sup>165</sup>.

The themes of Uzbek commercial cinema produced by private studios almost do not go beyond the range of themes already proven by the time and genre preferences of the public. These

<sup>162</sup> Data provided by the Uzbeffilm NA in January 2017.

<sup>163</sup> Karimova, N. (2019). Uzbekistan's film industry and its contribution to the socio-economic development of the country: Monograph. Tashkent: *Baktria Press*, 2019, p. 42.

<sup>164</sup> Nevafilm Research, Issue 4 (52), 2015.

<sup>165</sup> Karimova, N. (2019). Uzbekistan's film industry and its contribution to the socio-economic development of the country: Monograph. Tashkent: *Baktria Press*, 2019, p. 30.

are mainly general drama, romantic comedy and the traditional theme of family values and relationships. The genres of crime, historical film, film adaptation, psychological drama, and fantasy are still emerging.

On January 1, 2019, Uzbekistan introduced a quota system for showing domestic feature films in domestic cinemas: regardless of the form of ownership – at least 2 full-length films per day, and starting 2021 – at least 25% of the monthly screen time, and 40% on holidays.

The national film box office sometimes exceeds that of foreign competitors, which is primarily explained by large-scale advertising campaigns. As the result, domestically produced film and TV content is currently in demand among the viewers.

Based on the estimates of the Nevafilm Research Company (Russia), Uzbekistan's movie market is the most promising in Central Asia due to the large population and an extensive cinema network<sup>166</sup>.

Until 1996, 342 winter and summer cinemas operated under Uzbekistan Goskinokompaniya. As of today, 152 cinemas (total of 207 halls) have 51,205 seats. Only 75 of them (49.3%) show films. 65 registered cinemas do not work at all, 12 cinemas were transformed into other-purpose facilities. The remaining 74 cinemas (48.6%) are in a critical condition and require repair. The study showed that there are currently 23 cinemas in the city of Tashkent; of these, only 12 operate. Once very profitable cinemas need major repair and are not used<sup>167</sup>.

By offering feature films in a more comfortable format, television manifests a serious alternative to cinema. Whereas TV series make up about 20% of the entire national broadcasting, the total cinema film shows – live-action, documentary, and animated films – amount to only 30–40%<sup>168</sup>.

Another modern direction – smartphone cinema – is also considered one of the leading trends in the film market. Specially designed applications and software like Vplayer and MX Player allow the selection and viewing of films without resorting to torrents and websites.

The projects that have played a significant role in the development of national cinema and raising the social status of filmmaking figures include the following:

**Golden Cheetah Tashkent International Film Forum (2011–2013);**

- **KinoVisA Central Asian Film Festival (2007);**
- **Creative Flight Student Film Festival (2005–2009);**
- **PROlogue Republican Short Meter Festival (2015–2017);**
- **Afishka Short Film Festival (2010–2016), etc.**

Holding the days of modern Uzbek cinema and retrospective screenings abroad have become a tradition within the framework of promoting Uzbekistan's films on foreign screens. Over the years of independence, more than 180 feature, documentary and animated films have participated.

The international experience of creating specialized creative zones – Kinogorod (*rus. Cinema (Film) Cities*) has become an important aspect of the prospective development of the national film industry in the context of Uzbekistan's innovative development. The Decree of the President of the RUz Sh.M. Mirziyoyev *On Measures to Develop and Further Stimulate Information and Communication Technologies and Domestic Software Market* stipulates for the creation of the

<sup>166</sup> Nevafilm Research, Issue 4, 2015, p. 56.

<sup>167</sup> Data provided by Uzbefilm NA in January 2017.

<sup>168</sup> Karimova, N. (2019). Uzbekistan's film industry and its contribution to the socio-economic development of the country: Monograph. Tashkent: *Baktria Press*, 2019, p. 69.

“Information and Communication Technology Innovation Center” Creative Zone in Tashkent. It will facilitate the successful multimedia transformations development extremely necessary for the national income as the key factor of a new spirit of the times.

#### 4.4. Institutional capacity, including existing specialized educational and educational institutions, programs and schools

Uzbekistan’s filmmaking education is characterized by the simultaneous presence of two systems – the *ustoz-shogird* (master-student) traditional education system and the classical European system. Their integrated coexistence, harmoniously complementing each other, contributes to the formation of a full-fledged morphological picture of the modern national artistic culture of Uzbekistan. The centuries-old *ustoz-shogird* system is based on the principle of continuity in the forms of compact and individual education of a student group. In their adapted and modernized models both segments are widely applied at all the levels of the public art education system in accordance with this or that professional focus.

There is no specialized educational institution training exclusively filmmakers in Uzbekistan. There are plans though to open a filmmaking department at the State Institute of Arts and Culture.

Pre-university art education includes the following establishments: Nukus College of Art and Culture, Namangan and Tashkent Colleges of Culture offering TV and Video Photography major (until 2010, this specialty had the title of Film and TV Photographer); the corresponding graduates receive the following qualifications: Videographer, Assistant Photographer, Head of amateur Film/Photo/Video Studio, Video Film Editor and Art Photo Master.

Uzbekistan has several higher educational establishments training filmmaking specialists:

**1) State Institute of Arts and Culture of Uzbekistan (GIKUz)** offers the following film art specializations: Department of Film, Television and Radio Directing, and Department of Sound Engineering and Cinematography;

**2) National University of Uzbekistan** has the Department of Screen Arts History and Theory (School of Journalism) offering courses on the history of world and national cinema, media and film journalism;

**3) Tashkent University of Foreign Languages** has the Department of International Journalism offering cinema art courses;

**4) K. Bekhzod National Institute of Arts and Design** with the Academy of Arts of Uzbekistan also has the Theatrical Scenery Department training film industry specialists in the following areas: Artistic Solutions in cinema and TV films, and cartoons and computer animation.

Non-formal filmmaking education includes:

- **FOCUS School of Art**, founded by Z. Musakov, a famous Uzbek film director, has been operating since 2016 under the corresponding license. This non-state film school works in four main areas: film directing, acting, scriptwriting and animation; as well as offers its students short-term thematic intensive courses and one-off master classes. The school’s curriculum likewise includes public viewings and discussions of the most significant world cinema films, and meetings with filmmakers from Uzbekistan and CIS countries. The students shoot their own film works in the course of their studies. The school holds regular public film screenings;

- **Screenwriting courses at the Uzbek State University**, organized in 2014, led by J. Iskhakov and E. Khasanova (I alumni cohort);
- Screenwriting courses directed by Y. Tuichiyev at the Uzbekfilm NA (2016);
- **Cinemateca** (2015–2016) and **Salom, cinema!** (*uzb. Hello, Cinema!*) **Film Clubs** at A. Navoi National Library, as a form of public life and social communication venues which include screening of national film classics;
- Master classes, media labs with the participation of the leading filmmakers and film critics within the framework of international projects: **Updated Dialogues**, **Kino VIZA** (2007), **Tashkent International Film Forum** (2011–2013), **Pro loge RKF** (2015–2017), etc.;
- **FilmON** Project of the British Council in Uzbekistan (2006);
- **Five Directors Master Classes and Project** of the Center for Cinematography Development of Uzbekistan (non-governmental and non-profit organization) (2017).

#### 4.5. Main challenges, issues and significant gaps impeding film industry development

- Insufficient funding of national filmmaking projects remains a long-term challenge curbing the development of Uzbekistan's cinema. Low subsidies limit filmmakers in the use of special effects; there is also a shortage of computer visual effects specialists;
- The issue of tax incentives for private and small businesses engaged in film production, distribution, and service requires due attention. The possibility of creating free economic zones on the premises of large film studios;
- The need to draft legislation and design mechanisms to combat film piracy;
- Lack of conditions for facilitating joint film production with foreign partners in the form of duty-free film zones, tax rebates and easing of administrative procedures;
- There is also a need to develop arthouse cinema for promoting national culture and cinema in the international arena. In order to acquaint the audience with novel trends, it is necessary to improve the screening conditions (screenings in film clubs, discussions with directors and film scholars), as well as to develop and publish information materials (printed and online) about cinematography;
- There is no strategic approach as to selecting festivals and promoting films;
- There is a need for holding regular national, regional and international film festivals of action, documentary, short and animated films with the involvement of foreign film schools, experts and maître teachers;
- Insufficient number of screening facilities (sites). The film screening practice is unbalanced, and the number of cinema halls in constituencies is reducing, which highlights the need for reconstructing and digitally upgrading state-owned cinemas in Samarkand, Bukhara, and Ferghana. Almost all new facilities are located in shopping malls in large cities, and old cinema buildings are not renovated. There is a need to develop a regulatory mechanism allowing digital upgrading of existing cinemas;
- There is a need to develop informal educational models – seminars and master classes for beginner directors, operators, and filmmaking art managers, etc. along with the formal filmmaking education. It was indicated that in order to expand and improve the film education system, the educational establishment should work more closely with the Uzbekfilm NA

and National Television and Radio Company of Uzbekistan; it is also necessary to enhance the material and technical base (facilities and infrastructure) of designated educational establishments, organize special laboratories focusing on the filming and production cycle; establish creative workshops with the necessary cinema and television equipment, as well as network with similar educational institutions from the CIS countries, Europe and Asia. It is necessary to design inter-university scientific and practical trainings and master classes with the involvement of international filmmaking experts, practitioners and theoreticians. It is likewise important to introduce the English language as a mandatory course for all arts programs. The integration of trainees into professional practice also requires attention; setting up internships (student practice schemes) within projects implemented at state studios; financial and information support of student participation in international educational programs: festivals, pitchings, etc.

- Independent film schools require support, and film fora for students should be held to train the next generation of specialists;
- There is a need to organize workshops-schools of cinema/photo/video art integrating education and leisure (cinema, art and artistic lyceums) in the further education system;
- It is required to develop Uzbek film focus programs for screening them within the framework of international film festivals, as well as to create professional catalogues and other materials containing information about unique filming locations (zones), including their detailed infrastructure, etc.;
- The need to publish a printed or online version of the catalogue of Uzbek films, which will serve the purpose of restoring the national Soviet-time history of Uzbekistan's filmmaking and cinema;
- No sociological research is carried out on the cadre needs of the film industry and state of filmmaking education in Uzbekistan.

# 05. BRIEF OVERVIEW OF COVID-19 PANDEMIC IMPACTS ON THE REGION'S ECONOMIES



Shooting of the movie "The Horse Thieves. Roads of Time". © Yuliya Kim

60

The global COVID-19 pandemic has had a significant adverse effect on Central Asian economies.

As of fall 2020, the crisis had a greater impact on the region's economies than on its health systems. Central Asian countries were able to avoid the incidence and mortality rates observed in certain countries of the world<sup>169</sup>. According to the most recent estimates, in 2020 the region's economic performance fell by an average of 1.7% – the figure in fact hides the sharp discrepancies among the countries of the region: from the 12.6% downfall in Kyrgyzstan to the 1.8% growth in Turkmenistan, according to official data<sup>170</sup> (World Bank, 2020), (IMF, 2020). Responding to the pandemic crisis, the region's governments provided direct support to national health systems, financial assistance to citizens (Kazakhstan) affected by unemployment and quarantine; enterprises and individuals received tax incentives throughout CA. Postponed loan repayment schemes and bans on debt and risk reclassification in relation to existing private facilities were put into effect in Kazakhstan, Kyrgyzstan, Tajikistan and Uzbekistan (IMF, 2020)<sup>171</sup>.

**Fig. 10. Economic stimulus packages in Central Asia<sup>172</sup>**

Country	USD	% of GDP
Kazakhstan	13 bln	9.0
Uzbekistan	1 bln	1.9
Kyrgyzstan	571 mln	7.4
Tajikistan	33 mln	0.6

The market indicators of the audiovisual sector depend on five main resources: advertising revenues, public financing, consumer subscriptions for paid services (VoD, etc.), box office,

<sup>169</sup> <https://www.oecd.org/coronavirus/policy-responses/covid-19-crisis-response-in-central-asia-5305f172/>

<sup>170</sup> World Bank, 2020 [4]; IMF, 2020 [5].

<sup>171</sup> [https://www.unescap.org/sites/default/d8files/knowledge-products/NCA%20Covid-19%20policy%20brief\\_final.pdf](https://www.unescap.org/sites/default/d8files/knowledge-products/NCA%20Covid-19%20policy%20brief_final.pdf)

<sup>172</sup> ESCAP: Policy Responses to COVID-19 in Asia and the Pacific ([www.unescap.org/covid19/policy-responses](http://www.unescap.org/covid19/policy-responses)).

income from rental and conversion of audiovisual content for home viewing purposes<sup>173</sup>. The crisis associated with the COVID-19 pandemic has had a tremendous negative influence on these indicators due to the general reduction in state budget allocations for the development of the audiovisual sector; closure of cinemas, halting or significant reduction of film production, against the background of a simultaneous increase in project costs due to mandatory security measures, as well as an overall slowdown of business activity by distribution companies. Along with that, the demand for VoD audiovisual content has increased, but there are very few local streaming platforms operating in the Central Asian states.

It is worth noting that none of the CA governments rendered targeted support to the culture industry; on the contrary, the designated budgets stagnated and were cut.

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<sup>173</sup> IRIS *Plus* 2020–2, The European audiovisual industry in the time of COVID-19 European Audiovisual Observatory, Strasbourg, 2020, p. 4.

## 06. RECOMMENDATIONS FOR FURTHER DEVELOPMENT OF THE FILM INDUSTRY IN THE REGION



Shooting of the movie "Dov". © "Sugdsinamo" Studio

### 6.1. General recommendations

The recommendations below are relevant for all Central Asian countries covered in this study (Kazakhstan, Kyrgyzstan, Tajikistan, and Uzbekistan):

- Consider updating the legal framework in the field of cinema and adapting it to the needs of the modern film industry by adopting new laws and relevant regulations;
- Attend to the issue of formally fixing the status of creative specialists, as well as introducing additional forms of support, the importance of which is also reflected in the national-level list of measures of the Convention on the Protection and Promotion of the Diversity of Cultural Expressions (2005), Cl. 2(e) of Art. 6<sup>174</sup>;
- Focus on the existing mechanisms for combatting piracy and protecting licensing rights, as well as the legal framework on copyright and related rights in general, with a view to establish an appropriate legal framework in countries where it is missing;
- Consider the possibility of providing benefits for philanthropists and business representatives investing in the film sector, as well as the possibility of creating conditions to raise the investment attractiveness of the filmmaking industry;
- Pay attention to the industry's technical and technological fitting in order to enhance its facilities and infrastructure;
- Attend to the issue of concluding international agreements on joint production between the countries of the region and foreign countries;
- Consider establishing a national film commission in Kyrgyzstan and Tajikistan; expanding the network of regional film commissions across all countries; introducing tax preferences,

<sup>174</sup> [https://www.un.org/ru/documents/decl\\_conv/conventions/cultural\\_expression.shtml](https://www.un.org/ru/documents/decl_conv/conventions/cultural_expression.shtml)

easing administrative procedures and creating favourable conditions for attracting foreign investment to the region. Pay direct attention to the possibility of developing a structured national database of all cinematography organizations in each country;

- Consider the possibility of creating – or expanding in the countries where such organizations already exist – public associations, professional associations and guilds of the main filmmaking professions and ways of their financing and support, as well as mandating them with legal powers for interacting with government institutions and influencing decision-making on the issues associated with film industry development;
- Pay more attention to professional sector-specific education, namely consider the possibility of opening specialized film associations, improving the quality of professional education, providing education in such occupations as film producer, screenwriter, film expert, second-level film production specialists; consider the possibility of launching intensive English language courses at universities along with specialized subjects; consider the possibility of creating professional courses and holding master classes with the involvement of foreign filmmaking specialists for the workers in domestic film industries in order to improve their qualifications;
- Focus on the development of programs to include provinces in movie circuits, state programs to restore old cinemas and upgrade their equipment; consider the possibility of implementing Unified Automated Information Systems (UAIS) in all target countries;
- Attend to the issue of establishing a system ensuring continuous and detailed sociological, statistical and analytical research in all areas of the film industry;
- Pay attention to the issue of preserving the national cinematography heritage, including films of the independence period, and ensure proper conditions for their storage and restoration; consider equipping relevant institutions with modern equipment for digitizing film and photo archives;
- Attend to the issue of regional cooperation; consider the possibility of creating regional funds to support the film industry in Central Asia, and launching programs and agreements on cinematographic cooperation, joint film production;
- Consider the possibility of introducing the concepts of cultural and creative industries to national legal systems, as well as the possibility of drafting strategies for their development serving the purpose of the Convention on the Protection and Promotion of the Diversity of Cultural Expressions (2005), in particular one of its guidelines – principle of complementarity of economic and cultural aspects of development<sup>175</sup>.

## 6.2. Additional country recommendations

### Kazakhstan

Attend to the following:

- Structure and activities of the State National Cinema Support Center (SNCCS), and consider the issue of giving it legal and financial independence in the future. Pay attention to project pitching criteria, specifically the possibility of developing detailed criteria for participation, allocating funding to types of projects, and vesting the Expert Board with broad authority;

<sup>175</sup> [https://www.un.org/ru/documents/decl\\_conv/conventions/cultural\\_expression.shtml](https://www.un.org/ru/documents/decl_conv/conventions/cultural_expression.shtml)

- Develop production of animated and documentary films;
- Possibility of introducing the concept of cultural and creative industries into domestic legislation; possibility of formulating a strategy for their development, including the possibility of ratifying the Convention on the Protection and Promotion of the Diversity of Cultural Expressions (2005).

### Kyrgyzstan

Attend to the following:

- Insufficient public funding for the film industry;
- Operations of the Cinematography Department under the Ministry of Culture, Information and Tourism of the Kyrgyz Republic; strengthening state support for film industry development programs to ensure its better performance;
- Possibility of systemic state support of the efforts to promote domestic films at the national and international level;
- Lack of measures to support film distribution;
- Possibility of introducing the concept of cultural and creative industries into domestic legislation; possibility of formulating a strategy for their development, including the possibility of ratifying the Convention on the Protection and Promotion of the Diversity of Cultural Expressions (2005).

### Tajikistan

Attend to the following:

- Insufficient level of state financing of the film industry; possibility of including it in priority areas for budgeting purposes;
- Possibility of creating an authorized body mandated to distribute budget financing on a competitive basis, implementing film industry development policy as per its main directions;
- Possibility of easing audio visual content licensing procedures;
- Possibility of creating Tochikfilm SE contracts on rendering film production services corresponding to international models to attract foreign specialists;
- Development of animated film production;
- Possibility of creating a separate technical base for filmmaking students to conduct individual practical classes and create own film works; possibility of providing grant support for the creation of final qualification works;
- Possibility of introducing film specialties into the annual schedule of courses on vocational training, retraining, advanced and internship training of public servants under the state procurement system; focusing on the qualitative composition of employees of the main film industry organizations.

## Uzbekistan

Attend to the following:

- Insufficient public funding for the film industry, in particular the amount of subsidies for film production;
- Stimulating the development of arthouse cinema, creating conditions for its promotion;
- Possibility of holding an annual international film festival(s) with the invitation of foreign filmmakers to foster international cooperation;
- Possibility of presenting Uzbekistan's cinematography in the international film market.

## 07.

REVIEW OF UAIS IMPLEMENTATION:  
RUSSIAN FEDERATION CASE STUDY

© Almaty Film Festival

The UAIS is a unified automated information system containing information about film screenings in cinemas. In Russia, the UAIS is operated by the Federal Fund for Social and Economic Support of Domestic Cinematography (Cinema Fund) based on the state contract № 1252–01–41/03/14 for providing services associated with UAIS upgrading and operation of May 12, 2014. The Russian UAIS was created and operates in accordance with the instructions of the President of the Russian Federation to the Ministry of Culture of the Russian Federation. The system's tasks are to collect, record and process information about public film demonstrations in Russian cinemas.

The desire of the state and copyright holders to automate the purchase of movie tickets, unify the information indicated in them, and gain access to relevant information emerged in 2007<sup>176</sup>. The first steps towards the implementation of this initiative were taken in mid-2008, when representatives of the national Ministry of Culture held a meeting with the representatives of film companies, software developers and top management of cinema networks<sup>177</sup> to discuss a potential mechanism.

On May 1, 2010, the Federal Law № 126-FZ *On State Support of Cinematography of the Russian Federation* was amended accordingly, namely, the UAIS concept was introduced and the principles for its implementation and functioning were described, while the costs of installing the relevant equipment were assigned to “film demonstrator(s)” (i.e. cinemas themselves)<sup>178</sup>. The VPF (Virtual Print Fee) model – under which a cinema enters into an agreement with a third party to equip the cinema with digital equipment, payment for which is done from the payments by distributors in the course of a certain agreed period of time or until full repayment of costs – was never officially introduced in Russia<sup>179</sup>. The law stipulated the national Ministry of Culture as the owner

<sup>176</sup> Compilation “Cinéma Russe Contemporain, (R) Évolutions” by Eugénie Zvonkine, Villeneuve d'Ascq 2018, p. 286.

<sup>177</sup> *Idem*.

<sup>178</sup> Federal Law № 375-FZ *On Amending the Federal Law On State Support of Cinematography of the Russian Federation* of December 27, 2009 (Cl. 6 of Art. 1).

<sup>179</sup> <http://www.kinometro.ru/analytics/show/name/vpf> or <http://www.independentcinemas.com.au/virtual-print-fee-program>

of the system's databases responsible for ensuring UAIS deployment and functioning. The law likewise established that the procedure for the system's operation and terms for providing the information contained in it shall be determined by the Government of the Russian Federation. However, it was not sufficient for its practical implementation.

According to the Enactment of the Government of the Russian Federation № 837 of October 18, 2010, film screeners were ordered to provide the system with information about all tickets sold at least once an hour. At the same time, film organizations located in cities with populations of less than 100,000 and in rural settlements were supposed to switch to online data transmission by January 1, 2015. However, the requirement to transfer information about sold movie tickets to the UAIS at that time was not fulfilled by most independent film screening organizations, since the law did not provide for specific administrative measures imposed on violators, and also did not determine a corresponding authorized entity. In 2011, in order to facilitate the transition of domestic cinemas to digital technologies, the Commission of the EurAsEC Customs Union<sup>180</sup> introduced zero duties on the import of digital film projectors that slightly reduced the cost of equipment. In 2014, the Film Foundation became the UAIS's operator<sup>181</sup> and began elaborating methods for upgrading the system. At the same time, the necessary amendments were made to Federal Law № 126-FZ and Code of Administrative Offenses of the Russian Federation, specifically an article on the liability of film screeners for violating the requirements of UAIS operation.

As of December 31, 2018, 1,907 digital cinemas and 5,341 cinema halls were registered in Russia. In total, in 2018, 100.6 mln people or 69% of the country's population gained access to modern film screening services. Over 10 mln film demonstration sessions took place. Total cinema attendance amounted to 200.4 mln viewers<sup>182</sup>.

<sup>180</sup> Decision of the Commission of the Customs Union № 760 On Amending Unified Commodity Nomenclature of Foreign Economic Activity of the Customs Union and Unified Customs Tariff of the Customs Union in relation to digital film projectors with the output resolution of 2048x1080 pixels or more intended for public digital display of August 16, 2011.

<sup>181</sup> Basis: State Contract № 1252-01-41/03-14 of May 12, 2014 (information provided by the Cinema Fund).

<sup>182</sup> Russian Filmmaking Industry – 2018, Analytical Research, Cinema Foundation, Moscow, 2019, p. 18.

## 08. OVERVIEW OF THE STRUCTURE AND FINANCING MECHANISMS OF THE WORLD'S LEADING FILM INDUSTRIES: COUNTRY CASE STUDIES



Shooting of the movie "Voice of the Steppes". © Ermek Shinarbayev

### 8.1. Centralized model: France

#### 8.1.1. Brief historical survey of the development of the film industry

Historically, France was one of the first countries in the world to adopt a public policy in the sphere of cinematography. December 28, 1895 is considered the official date of the birth of the cinema – on this day the first public paid film screening took place in the Indian Salon of Paris's Grand Cafe<sup>183</sup>. In 1907, there were already over a hundred cinemas operating in Paris, and in 1911 Gaumont<sup>184</sup> opened in Paris the then largest cinema in the world (3,400 seats)<sup>185</sup>. In 1940, the COIC (fr. *Comité d'Organisation de l'Industrie Cinématographique*) Filmmaking Organizing Committee was established, and the first measures to regulate cinemas were introduced – laying the foundation of the regulations still used today<sup>186</sup>. In 1941, a single ticket system was deployed. In 1945, the show unions merged into the National Federation of French Cinemas – FNCF (fr. *La Fédération Nationale des Cinémas Français*), and in 1946 as per the unanimous decision of the deputies of the National Assembly (lower house of French Parliament), the CNC (fr. *Centre national du cinéma et de l'image animée*), i.e. National Cinematography Center, was created. It was in the 1950's that the *new wave* concept emerged in France, denoting a new type of cinema, i.e. transition to *auteur cinéma* (author's cinema).

Historically, French society appreciates the efforts made by the state in the field of culture and cinema, and is highly cinema aware, which was manifested in the international arena during the commercial negotiations under the so-called Uruguay Round (1993) of the WTO agreements. Thus, France – that was soon supported by the European Union – believed that world trade rules were not applicable to cultural objects. Europe has been advocating the idea that the cinema economy cannot be completely liberalized, because the industry is also associated with such issues as artistic creativity, culture and politics. This special approach to the cultural industries led to the creation of the UNESCO Convention on the Protection and Promotion of

<sup>183</sup> French cinema – a full house a century long, by Joël Chapron and Priscilla Gessati, Moscow, 2016, p. 25.

<sup>184</sup> Gaumont, cinema chain.

<sup>185</sup> French cinema – a full house a century long, by Joël Chapron and Priscilla Gessati, Moscow, 2016, p. 26.

<sup>186</sup> *Idem*, p.34.

the Diversity of Cultural Expressions (2005). In the summer of 2013, when EU member states were to express their views on the start of new trade negotiations between the EU and the US, France's firm position led to the exclusion of audiovisual and cinematic spheres from the discussion<sup>187</sup>.

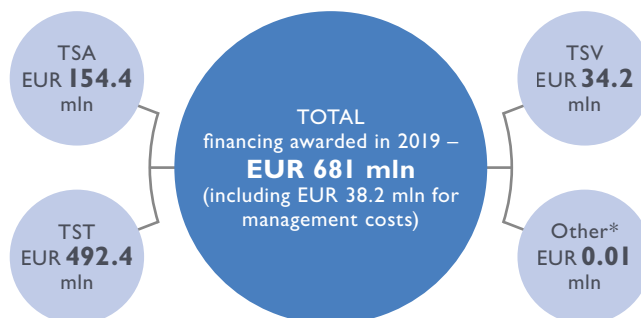
### 8.1.2. Key film industry organizations, principles of their operation and interaction

#### 1) National Cinematography Center (CNC)

France's public audiovisual financing system is represented by at single central national agency – CNC or National Cinematography Center, as well as 32 regional agencies<sup>188</sup>. The CNC was established as per the Law of October 25, 1946, and subsequently reformed as per Decree № 2009–901 of July 24, 2009 that amended the legislative aspects of the CNC Code. The national Code of Cinema and Animation (*fr. Code du Cinéma et de l'Image Animée*), in particular the annex to the General Regulations on Financial Support (hereinafter, RGA, *fr. Règlement Général des Aides Financières du Centre National du Cinéma et de l'Image Animée*), describes the general rules and provisions regulating the principles of support rendered by CNC. The President is appointed at the suggestion of the Minister of Culture and approved by the Council of Ministers.

CNC is a government agency established as an entity with financial autonomy. Under the leadership of the Ministry of Culture, CNC is responsible for ensuring the implementation of public policies in filmmaking and related industries, namely television, video and multimedia, including video games. Its tasks include monitoring the sector; supporting and developing the screen industry; monitoring of the commercial revenues of exhibitors, film and video distributors; maintaining official film and television registers; preserving cinematic archives through the *mandatory copy* mechanism; and combating piracy of audiovisual content<sup>189</sup>.

**Fig. 11. CNC financing by sources (2019)<sup>190</sup>**  
(clarification for different sources is provided further in the report)



\* Other return of the advance against fees and return of subsidies (in case of rejection of a supported project) + own funds consisting of professional membership fees on behalf of filmmaking sector enterprises, a share quota of RPCA deposit costs and financial income from investment of funds.

Since 2011, the budget law has established deductions from CNC revenues to the state budget<sup>191</sup>.

<sup>187</sup> Principles and Mechanisms for Financing French Cinema, by Joël Chapron and Priscilla Gessati. 2<sup>nd</sup> Edition, revised and supplemented. Moscow, 2013, p.17.

<sup>188</sup> See full list at: <http://www.ciclic.fr/ressources/trouver-une-collectivite-panorama-2018>

<sup>189</sup> European Audiovisual Observatory (Council of Europe) 2019, Mapping of Film and Audiovisual Public Funding Criteria in the EU, p. 270.

<sup>190</sup> <https://www.cnc.fr/documents/36995/1118512/Bilan+2019+du+CNC.pdf/406786cb-2610-8134-1c85-c17424116365>

<sup>191</sup> Principles and Mechanisms for Financing French Cinema, by Joël Chapron and Priscilla Gessati. 2<sup>nd</sup> Edition, revised and supplemented. Moscow, 2013, p. 32.

These funds are allocated to the sector through automatic and selective support mechanisms via over 90 different financing facilities.

The collection function has been assigned to CNC since 2009, forming a support fund and distributing the collected funds among budget lines. Only commissions comprising 9 CNC departments and consisting of industry professionals are mandated to decide on subsidy distribution, and all decisions shall be approved by the CNC President. Starting from the conception of the film being registered with the RPCA State Registry of Cinema and Audiovisual Media (*fr. Registry public du cinéma et de l'audiovisuel*) to the film release which is confirmed by the Distribution Certificate issued by the Classification Committee including control of the box office within theatrical distribution period. RPCA registration ensures a sequence of rights and controls when payments to rights holders are due, which guarantees the observance of the rights of various partners. Only pictures that have received the distribution certificates issued by the Ministry of Culture (Law of February 22, 1944) based on conclusion of the Classification Commission are allowed to be released. Film demonstration quotas for cinemas were canceled in the early 1950's. Films are released to secondary markets (DVD, TV and VoD) only after official release according to the terms established by law.

**2) Unifrance** – association for promoting and distributing French cinematography. Established in 1949, the organization unites approx. 900 members and operates under the CNC's direct supervision. It is financed mainly by CNC with the participation of the Ministry of Foreign Affairs, Ministry of Culture, Paris Mayor's Office and from own income (membership fees, partnership agreements).

### 3) Local self-government bodies

Certain powers in cultural policy were transferred to the regional bureaus of culture DRAC (*fr. Directions régionales des affaires culturelles*) operating under the Ministry of Culture and implementing the ministerial policies locally. Within its regional cultural bureaus, CNC has assembled teams of filmmaking and audiovisual advisers, mainly responsible for monitoring and consulting (review of multiplex files, advising industry professionals on support system issues, festivals).

The relations among the state, CNC and local self-governments are contractual allowing them to set out an action plan for the future and establish the financial obligations of the parties. Local governance bodies also provide financial support to the film industry from their respective local budgets based on the principle of "1 euro from CNC for 2 euros from a region". Regions, departments and municipalities have established appropriate facilities to invest in cinematography.

The following regions have the largest funds in terms of financing scale<sup>192</sup>:

- Ile de France: EUR 17.48 mln;
- New Aquitaine (*fr. Nouvelle-Aquitaine*): EUR 7.75 mln;
- Hauts de France: Euro7.6 mln;
- Provence-Alpes-Cote d'Azur: EUR 6.62 mln;
- Grand Est: EUR 3.96 mln;
- Bretagne: EUR 3.62 mln.
- Overall, regional-level support to the film industry is rendered in 13 regions of France<sup>193</sup>.

<sup>192</sup> European Audiovisual Observatory (Council of Europe) 2019, Mapping of Film and Audiovisual Public Funding Criteria in the EU, p. 271.

<sup>193</sup> <https://www.cnc.fr/professionnels/etudes-et-rapports/statistiques/statistiques-par-sectEUR> (Données par région Section).

The actual provision of support under regional support schemes is regulated by either municipal or regional authorities, and in some cases by special laws and individual appeals.

**4) National Commission of French Cinema** (fr. *Commission Nationale du Film France*, funded by CNC), commonly known as Film France, fulfills the following functions:

- Information on financing, rules and shooting (database of 20,000 locations), shooting permits, line producers and film production companies, suppliers;
- Assistance to producers applying for TRIP (tax benefit for international production). France's network of film commissions consists of 36 regional commissions, including French Overseas<sup>194</sup>.

#### 5) Professional associations and trade unions

Each film industry branch forms a trade union or association to regulate professional activities and protect its interests. They participate in collective bargaining, taking into account industry specificities and developing a minimum social benefits scale. Delegates of such associations represent professionals in CNC commissions and participate in all negotiations and discussions related to the filmmaking sector<sup>195</sup>.

The National Federation of French Cinemas (FNCF)<sup>196</sup> – established in 1945 – deserves particular note. It is an association of trade unions, owners and managers of cinema halls, headed by the Federal Board consisting of all the chairpersons of the trade unions, members of the Federation, as well as chairpersons and rapporteurs of sectoral commissions and chairpersons of permanent commissions. The FNCF unites almost all cinemas in France. Its main task is to be the representative of the film screening system in liaising with all potential partners and opponents, including official agencies like the Ministry of Culture and Communication, CNC, national Parliament, etc. One of its most important missions is promoting and supporting films in cinema halls. The annual FNCF congress brings together 2,000 participants and constitutes one of the most significant events of the cinematographic year.

As of today, France's largest film networks include Gaumont/Pathé, CGR, and UGC.

**6) French Institute** (fr. *Institut Français*) is a single agency carrying out France's cultural diplomacy abroad. In the field of filmmaking, the Film Department of the French Institute is engaged in non-commercial screenings of French feature films and documentaries around the world, as well as organizing events accompanying film distribution<sup>197</sup>.

In 2012, Support for the World's Cinemas was established, regulated by the French Institute and CNC. It covers full-length films and can be issued both before the start and after completing a film's shooting. Only French producers can apply. The amount of the subsidy is limited to EUR 250,000 prior to shooting and EUR 50,000 after its completion, and cannot exceed 50% of the contribution to project financing on behalf of the French producer (with exceptions)<sup>198</sup>.

**7) Supreme Body for the Dissemination of Works and Protection of Internet Rights, HADOPI** (fr. *La Haute Autorité pour la diffusion des œuvres et la protection des droits sur internet*).

<sup>194</sup> <https://www.filmfrance.net/v2/gb/home.cfm?choixmenu=reseau>

<sup>195</sup> Principles and Mechanisms for Financing French Cinema, by Joël Chapron and Priscilla Gessati. 2<sup>nd</sup> Edition, revised and supplemented. Moscow, 2013, p. 97.

<sup>196</sup> French cinema – a full house a century long, by Joël Chapron and Priscilla Gessati, Moscow, 2016, p. 152.

<sup>197</sup> Principles and Mechanisms for Financing French Cinema, by Joël Chapron and Priscilla Gessati. 2<sup>nd</sup> Edition, revised and supplemented. Moscow, 2013, p. 105.

<sup>198</sup> *Idem*, p. 107.

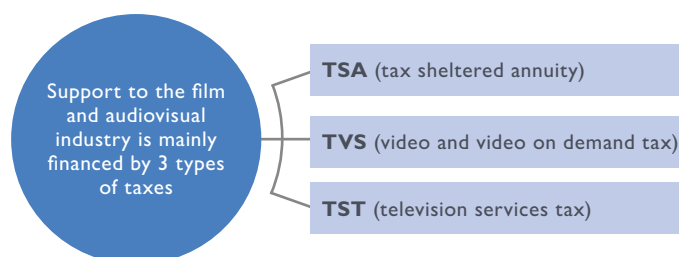
In 2020, France established the Supreme Body for the Dissemination of Works and Protection of Internet Rights, HADOPI, with the following objectives: contribute to the expansion of the legal offer by compiling a list of portals offering lawful access to works (film, audiovisual, music, literary, video games, photographs and programs), as well as protect the rights of creators by introducing a system of “step-by-step authorization” for internet users.

### 8.1.3. Financing mechanisms

Funding for the film industry support system is based on automatic deductions from tickets sold from all films, including foreign ones, channeled to CNC via the national UAIS.

The following deductions are made from the cost of each ticket sold: 10.72% of TSA (Special Additional Tax), 7% of VAT (Value Added Tax); 1.25% of the ticket cost without VAT is deducted for the Community of Authors, Composers and Music Publishers – SACEM (*fr. Société des auteurs, compositeurs et éditeurs de musique*) to pay authors of musical works<sup>199</sup>. Free access TV channels participate in the replenishment of the support fund, deducting an annual tax on turnover and are obliged to directly invest 3.2% of their annual turnover in film production if they show at least 52 films per year, which go towards purchase of broadcast rights, investing in the form of a co-producer share and funds for distribution in cinema halls<sup>200</sup>. Channels also follow clear rules for showing films (prohibition of shows on certain days, quotas depending on the country of production). Since 2011, internet providers have also been involved in financing the support fund, since their service offer has included television content.

**Fig. 12. Types of taxes forming CNC funds**



CNC support is divided into 4 main types and is distributed as follows:

#### I. Cinema

##### I.1. Automatic support

- Production;
- Release;
- Display.

To be eligible for the automatic support system, a film shall receive a national film production certificate, gaining 25 points on the 100-point scale, which takes account of the film language, producing enterprise, authors, performers, technical and support staff – which should consist of French or EU citizens – as well as shooting location and the country where post-production takes place. In the future, the film producer can reinvest a certain share of the fees collected in cinemas, on television and from video sales in his/her film for up to 5 years<sup>201</sup>.

<sup>199</sup> *Idem*, p. 33.

<sup>200</sup> *Idem*, p. 76.

<sup>201</sup> *Idem*, c. 46.

### 1.2. Selective support

- Production and artwork;
- Release;
- Display;
- Distribution.

Selective support system (income loan) is based on quality criteria. The advance payment against fees is an interest-free loan returned based on the results of the screening of supported films. Scenario work is supported with another type of assistance.

## 2. Digital Transition Plan

- 2.1. Digitizing of works;
- 2.2. Digitizing of cinemas;
- 2.3. Digital distribution and storage.

## 3. Audiovisual

- 3.1. Automatic support for audiovisual production;
- 3.2. Selective support for production and artwork.

## 4. End-to-end programs

- 4.1. Automatic support
  - Production and video on request;
  - Demonstration.
- 4.2. Selective support
  - Facilities and infrastructure;
  - Video and video on demand;
  - Innovation and video games;
  - Promotion/export;
  - Other types of support.

In addition to the CNC support system described above and regional funds, as well as the IFCIC<sup>202</sup> (Institute for Financing of Film and Cultural Industries), EURIMAGES<sup>203</sup> (largest European fund) and MEDIA Program<sup>204</sup>, several more independent organizations investing in the French film industry deserve attention:

- **SOFICA** (*fr. Les Sociétés de financement de l'industrie cinématographique et de l'audiovisuel*) – film and audiovisual financing societies were established under the Law of July 11, 1985. These are capital investment companies<sup>205</sup> raising funds from private individuals, and investing them exclusively in the film and audiovisual production sector. SOFICA are not co-producers (do not have access to automatic support), distributors, or broadcasters; in exchange for the invested funds, they receive the right to access the proceeds from the display of works. SOFICA's investment should not exceed 50% of the European share of funding per project. Since 2005, under CNC supervision SOFICA annually – and prior to

<sup>202</sup> IFCIC (*fr. Institut pour le Financement du Cinéma et des Industries Culturelles*): <http://www.ifcic.fr/ifcic/presentation-de-l-ifcic.html>

<sup>203</sup> Eurimages, Cultural Support Fund of the Council of Europe: <https://www.coe.int/en/web/eurimages/what-we-do>

<sup>204</sup> MEDIA (*fr. Mesure d'Encouragement au Développement de l'Industrie Audiovisuelle*), Measure to promote the development of the audiovisual industry, Programme of the European Commission: [https://eacea.ec.europa.eu/creative-europe/actions/media\\_en](https://eacea.ec.europa.eu/creative-europe/actions/media_en)

<sup>205</sup> A type of financial activity within the framework of which an investor enters the capital of equity companies lacking their own funds.

the start of fundraising – sign a professional charter defining the investment procedure for independent production<sup>206</sup>;

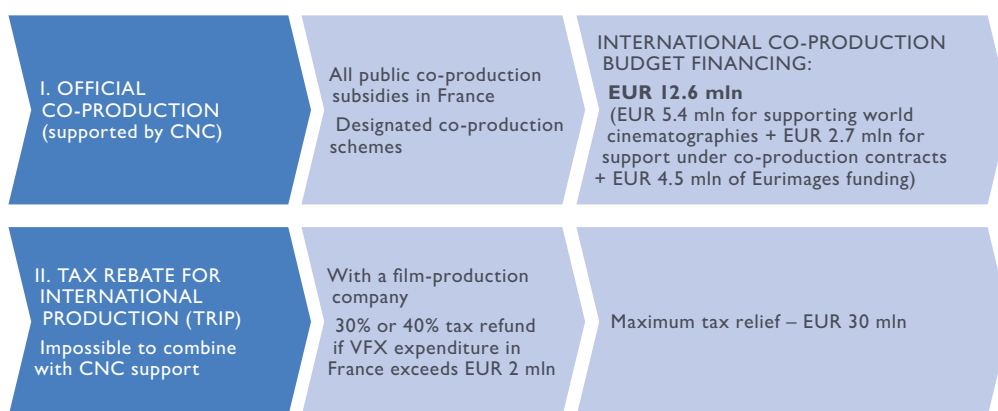
- ARTE France – French-German cultural channel operating outside French legislation but participating in independent filmmaking by way of pre-purchase and co-production (ARTE France Cinéma), and mainly supporting arthouse cinema;
- Film services, such as the Canal+ private channel with a connection fee, a package of 7 thematic channels dominated by Ciné + cinema (also linked with Canal+) and a group of 5 subscriber access channels specializing in Orange Cinéma Séries (OCS) film and TV series, annually invest in film production of films and purchase of rights. Thus, in 2019 Canal+ took part in the financing of 120 films, Ciné+ in the financing of 124 films, and OCS – 41 films, with the total investment exceeding EUR 150 mln<sup>207</sup>.

#### 8.1.4. Co-production project support map

Preferential international taxation (C2I) is a financial mechanism introduced in 2009 to promote foreign film production in France. It covers feature and/or animated films, as well as audiovisual works (individual and series), the production of which is initiated by a foreign enterprise and fully or partially takes place in France. The C2I tax benefit may be granted to works for which at least EUR 1 mln and at least 5 shooting days were spent in France<sup>208</sup>.

France has signed 58 co-filmmaking treaties<sup>209</sup>, but these treaties are not always updated. There are three special funds created by CNC to support joint production with Germany, Canada (since 1983), and Italy (since 2013).

**Fig. 13. Two avenues for co-production projects in France<sup>210</sup>**



#### I. Official co-production

General terms applicable to all support programs:

- Feature films: live-action, documentary, animation > 60 minutes;
- Subsidies (non-refundable)/50% of subsidies are to be spent in France;

<sup>206</sup> Principles and Mechanisms for Financing French Cinema, by Joël Chapron and Priscilla Gessati. 2<sup>nd</sup> Edition, revised and supplemented. Moscow, 2013, p. 44.

<sup>207</sup> <https://www.cnc.fr/documents/36995/1118512/Bilan+2019+du+CNC.pdf/406786cb-2610-8134-1c85-cl7424116365>, p. 98.

<sup>208</sup> Principles and Mechanisms for Financing French Cinema, by Joël Chapron and Priscilla Gessati. 2<sup>nd</sup> Edition, revised and supplemented. Moscow, 2013, p. 98.

<sup>209</sup> CNC, session under the Marché du Film 2020.

<sup>210</sup> Film France, session under the Marché du Film 2020.

- Application/Beneficiary = Producer registered in France;
- Request (scenario, notes) in French;
- Request is made prior to the start of filming;
- ACM, Support of the World's Cinemas (*fr. Aide aux cinémas du monde*): Language criterion (Director's Language)/Location;
- France-Germany or Italy: both are main partners.

Types of support programs (one project can combine all three types of support):

1) ACM, Support of the World's Cinemas

Allocated budget: EUR 130,000 for feature films/EUR 65,000 for documentary films/EUR 40,000 for post-production.

French Initiative films<sup>211</sup>: EUR 300,000 for feature films.

**Fig. 14. ACM project selection process**



If a country has no joint production agreement with France, and a producer is not from the European Union, then the film budget should not exceed EUR 2.5 mln, but this is rather not an official co-production, but a technical one, and it does not require official certification (25 points).

2) Support under co-production agreements (only with Portugal, Italy, Tunisia, Germany)

Allocated amounts vary depending on agreement terms.

3) Eurimages Fund (based on co-production agreements only)

Maximum 17% of budget (25% for documentaries) – maximum of EUR 500,000.

## II. Tax Rebate for International Production (TRIP)

### What film formats are eligible?

All formats are eligible except for documentaries and commercials: live-action, animation, VFX, VR, feature films, short films, VFX/post-production, series (single episodes or entire seasons; web, OTT or TV, all budgets)

### TRIP eligibility in France: Criteria

- French Film Production Company (PSC)
  - Minimum of 5 days of shooting in France. No minimum shooting days requirements for animation and VFX;
  - Costs of preparatory works in France should be at least EUR 250,000 (or 50% of budget, whichever is smaller);
  - Cultural test, including dramatic content

<sup>211</sup> Films fully funded by a French producer or dominated by French capital are commonly called "French Initiative Films".

### Getting access to TRIP

- TRIP is available through a company – income tax payer in France
  - Acts as production service company for foreign filmmakers, and receives TRIP on its tax return;
  - Can be either an already existing company or subsidiary of a foreign company, or special purpose vehicle (SPV)<sup>212</sup>

### When to apply?

Receiving a compliance response within 3 weeks.

Producer or PSC contacts Film France:

1) PSC requests a preliminary estimate from the CNC (currently a digital process). Minimum formalities: script, service note and first estimate are to be provided.

- PSC can start spending budget;
- CNC issues a preliminary assessment within 3 weeks.

2) Projects launched annually receive money from French tax authorities through PSC. Tax authorities can pay tax benefits before obtaining final qualification.

3) PSC requests a final assessment from CNC, maximum 2 years after the French side's last costs.

- CNC issues the final assessment within 8 weeks.

### What costs qualify?

- Salaries of European screenwriters/actors (+ social contributions); there is a limit on amounts;
- Salaries paid to French or European personnel (salaries and additional costs + social contributions);
- Costs of technical goods and services in France (including VFX/animation/additional production);
- Rental of locations and construction of scenery;
- Accommodation/meals/business trips of all actors/teams;
- Transportation of materials;
- Depreciation expenses

### Financing amount

- Maximum limit: tax benefit of EUR 30 mln per project;
  - 30% tax rebate for all related costs;
  - 40% tax rebate for all related costs, including the new 10% VFX bonus option (only live-action projects can qualify for the 10% VFX bonus, including a significant amount of VFX, and VFX costs exceeding EUR 2 mln)

The information about French regional funds reviewing co-production projects for partial financing is presented below; project review terms vary.

#### Brittany (*fr. Bretagne*)

Projects for the joint international development of feature films and audio visual series; maximum financing – EUR 40,000; 100% of the funding received is to be spent in the region.

#### Loire Valley

Assistance is based on the ACM support principle, and is aimed at the development of film production in the region; all costs associated with project development are eligible for support through a partner's local production company; financing amount – up to EUR 40,000.

#### Grand Est

Fund is open for co-production projects with Belgium, Luxembourg, Germany and Switzerland.

#### Paris/Île-de-France Region

A new condition for providing 30% of benefits to stimulate international co-production in Paris Region.

<sup>212</sup> What is SPV? ([https://www.banki.ru/wikibank/\\_kompaniya\\_spetsialnogo\\_naznacheniya\\_spv/](https://www.banki.ru/wikibank/_kompaniya_spetsialnogo_naznacheniya_spv/)).

### ALCA<sup>213</sup> in New Aquitaine

Through ALCA, New Aquitaine Region operates the film fund (budget EUR 7 mln) reaching EUR 11 mln together with local regional governments. The Fund accepts projects of all types (documentary, fiction, television, animation) for consideration and at any stage of the creation process (script writing, development, production). The Fund is open for international co-production through a partner's local production company (there are about 15).

### Normandie Images Agency in Normandy

The Fund is open for international co-production through a partner's local production company; financing amount – up to EUR 30,000; project completion – 24 months maximum; 2 project review committee sessions per year.

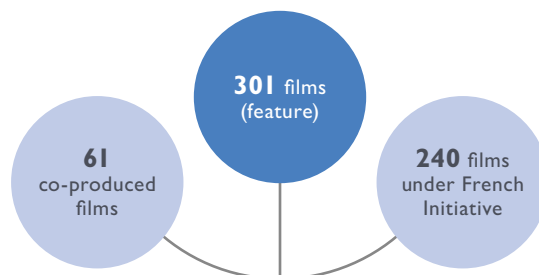
### South of France (Provence-Alpes-Côte d'Azur)

Grants for the development of feature, documentary and television films under international co-production; projects should involve an executive production company with the head office in France or the EU; all production companies can apply for a grant if a project is submitted as part of a joint production or co-development contract signed between this company and a foreign company; minimum amount – EUR 15,000, maximum amount – EUR 20,000; grant is used for scouting, rewriting the script, establishing contact with distributors, broadcasters and partners, especially foreign.

## 8.1.5. Statistics

- Cinemas – 2,045<sup>214</sup> (2019);
- Multiplexes – 232<sup>215</sup> (2019);
- Screens – 6,114<sup>216</sup> (2019);
- Seats – 1,140,999<sup>217</sup> (2019);
- Boxoffice – EUR 213 mln<sup>218</sup> (2019).

**Fig. 15. Number of films that received CNC support in 2019<sup>219</sup>**



<sup>213</sup> <https://alca-nouvelle-aquitaine.fr/fr>

<sup>214</sup> <https://www.cnc.fr/professionnels/etudes-et-rapports/statistiques/statistiques-par-secteur>

<sup>215</sup> *Idem.*

<sup>216</sup> *Idem.*

<sup>217</sup> *Idem.*

<sup>218</sup> *Idem.*

<sup>219</sup> <https://www.cnc.fr/documents/36995/1118512/Bilan+2019+du+CNC.pdf/406786cb-2610-8134-1c85-cl7424116365>

Altogether, in 2019 116 films with 35 foreign partners were co-produced in France, including 55 with predominantly French capital, and 61 with predominantly foreign capital, totaling EUR 508.9 mln<sup>220</sup>.

## 8.2. Decentralized model: Germany. General film industry indicators, features of national (federal) and regional funds

### 8.2.1. Germany's film industry in figures in 2019<sup>221</sup>

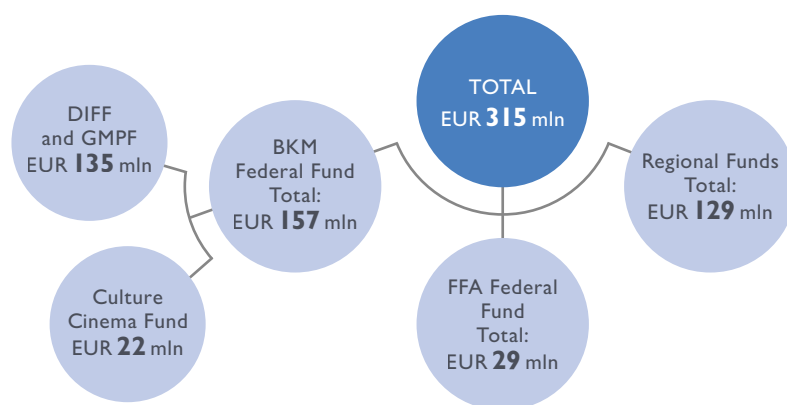
The number of film premieres in German cinemas increased by 30 against the previous year. Of 606 first releases, 252 were German, 157 from EU countries, 126 from the US, and 71 from other countries.

In 2019, the number of tickets purchased for new releases reached 103 mln, including 60.1% of tickets sold for US films, 18.4% for German films, 17.1% for films from EU countries, and 4.4% for films from other countries.

- Box office: EUR 1,024 mln;
- Distributors: 1,227;
- Cinemas: 1,734;
- Screens: 4,961;
- Seats (excluding outdoor seats, seats in universities cinemas, festivals and closed cinemas): 798,442;
- Multiplexes: 1,513.

Germany offers a wide range of attractive opportunities thanks to 4 federal and 8 regional cinematography financing programs also available for international co-production. Many of these programs are designed specifically to support the production of feature films and high-quality TV series and shows. Annual subsidies for the film and television industry exceeding EUR 300 mln classify Germany as one of the leading film and media venues in Europe.

**Fig. 16. Annual film production financing (2019)<sup>222</sup>**



<sup>220</sup> *Idem*, p. 92.

<sup>221</sup> Die wichtigsten Kinoergebnisse in Deutschland 2019 (eng. *The Most Important Data on German Cinema in 2019*). Published at the FFA Platform of the Cannes Film Market (Marché du Film) 2020.

<sup>222</sup> BKM, Federal Government Commissioner for Culture and the Media.

## 8.2.2. Federal funds

### 1. FFA (Filmförderungsanstalt)<sup>223</sup>

Germany's Federal Filmmaking Agency (FFA) is the national funding body for cinematography supporting all aspects of the industry's interests. FFA finances feature films at all stages of production and implementation: from scriptwriting and production to distribution, sale and video rental. Additional support goes for financing cinemas, preserving cinematographic heritage, supporting and promoting German cinema abroad, as well as filmmaking training. Along with the functions of a funding body, FFA serves as the central film industry service. Moreover, FFA cooperates with other European financial institutions to facilitate transboundary projects and joint production.

FFA is a member of the European Film Agency Directors association (EFAD) bringing together institutions that finance cinematography from 31 European countries.

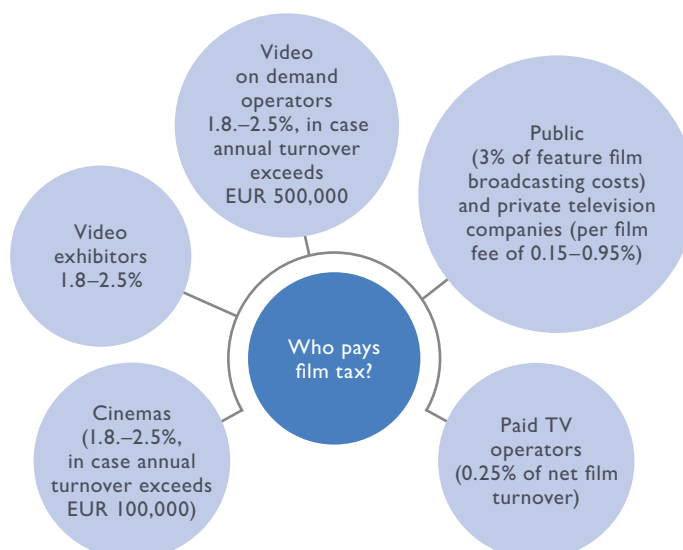
In addition, the FFA is responsible for managing the financing programs for cinema projects supported by the Federal Government Commissioner for Culture and Media (BKM), including programs of the German Federal Film Fund (DFFF), German Cinematography Fund (GMPF), as well as processing applications for financing feature and short film projects.

According to the updated version of the Law on the Promotion of Cinema in Germany (FFG), which entered into force in January 2017, film industry experts comprising three independent committees review and decide on applications from various FFA financing areas:

- Production and Scenario Financing Committee;
- Video Distribution, Sales and Financing Committee;
- Cinema Financing Committee.
- The FFA's annual budget amounts to approx. EUR 76 mln.

The budget is funded by the so-called film tax (tax on income for feature film use).

**Fig. 17. Film tax structure**



<sup>223</sup> <https://www.ffa.de/>

#### FFA funding areas:

- Production financing (\*2019 – EUR 29.27 mln for feature films<sup>224</sup>)

FFA funds the production of films of all genres. Funding is provided in the form of two types of support: within the framework of selection-based project financing – financing of film projects; and in the form of automatic financing based on established parameters – the so-called “reference-based financing”. A producer receives project funding if he/she can convince the committee of the viability of the scenario, as well as the project’s production and marketing concept. Reference-based funding represents retroactive support based on box office results, awards won and festival participation.

FFA supports producers of successful national films through retroactive funding – the aforementioned reference funding. The scoring system serves as a benchmark for money allocation. The funding is issued in the form of grants that are not refundable but shall be used to produce or release new films.

FFA can likewise support a new filmmaking project planned jointly with a French partner as per the so-called “Minitraité” scheme<sup>225</sup>.

- Scenario development financing (\*in 2019 – EUR 1.51 mln<sup>226</sup>)

FFA awards a grant for script writing for German feature films up to EUR 25,000; in exceptional cases – up to EUR 35,000. FFA grants not exceeding EUR 10,000 can be also allocated for synopsis development. The subsequent scenario work can be supported up to EUR 75,000; and an additional EUR 25,000 can be awarded on a request basis.

- Short film financing (\*in 2019 – EUR 0.57 mln<sup>227</sup>)

FFS supports short meter under the established scoring system. Applications are accepted for films lasting up to 30 minutes, as well as for children’s films lasting up to 58 minutes, capable of providing evidence of their success at festivals and receipt of recognized short film awards.

- Distribution and video financing (\*in 2019 – EUR 11.27 mln for distribution, and EUR 7.20 mln for media support<sup>228</sup>)

In addition to financing the production of German feature films, the FFA also supports distributors and sales agents. Feature film distribution and marketing can be facilitated in various ways – either as part of project distribution financing, the so-called media services, or via qualification-based automatic financing, or reference-based distribution financing. Demonstration of a feature film in cinemas and on video can also be supported as a general measure.

FFA supports distributors of successful German films through retroactive financing – reference-based distribution financing. As in the case of retroactive production financing, the total number of reference points is calculated based on local box office indicators, success at important national and international film festivals, and cinematographic awards.

<sup>224</sup> Die wichtigsten Kinoergebnisse in Deutschland 2019 (eng. *The Most Important Data on German Cinema in 2019*). Published at the FFA Platform of the Cannes Film Market (Marché du Film) 2020.

<sup>225</sup> A film project created jointly with a French producer can be supported by the FFA as part of the German-French joint production agreement. Annual funding from both countries – EUR 3.2 mln, including EUR 200,000 allocated to the German-French Project Development Fund to support the next generation of producers. BKM and FFA allocate production financing from the German side based on the 50/50 model.

<sup>226</sup> Die wichtigsten Kinoergebnisse in Deutschland 2019 (eng. *The Most Important Data on German Cinema in 2019*). Published at the FFA Platform of the Cannes Film Market (Marché du Film) 2020.

<sup>227</sup> *Idem.*

<sup>228</sup> *Idem.*

- (Cinema) screening financing (\*in 2019 – EUR 11.23 mln<sup>229</sup>)

The purpose of screening financing is to enhance and preserve diverse national cinema infrastructure, as well as its quality, both rural and urban. Funding is provided under projects and based on basic principles.

Screening financing grants are awarded to distributors whose film screening programs have demonstrated high performance, or who have achieved high box office performance under German or European film screening programs.

- International cooperation

FFA has joint project development agreements with other European organizations, including a transboundary development fund for projects in Germany, Luxembourg, Belgium and France, as well as an agreement with Poland for executing German-Polish projects.

- FFA additional financing measures (\*in 2019 – EUR 6.27 mln for promoting German cinema domestically and abroad, and EUR 3.33 mln<sup>230</sup> for film heritage programs)

In addition to the funding awarded via the committees, FFA implements targeted initiatives to strengthen Germany's film industry and cinemas under § 2 of FFG. They include, for example, market research, digitizing of the national cinematic heritage, film broadcasting (Vision Kino GmbH), combatting film piracy and international representation of German cinema (German Films Service + Marketing GmbH).

## **2. BKM (ger. *Die Beauftragte der Bundesregierung für Kultur und Medien*)<sup>231</sup>**

The Federal Government's Commissioner for Culture and Media (BKM) is responsible for the cultural and information capacities of Germany's Federal Government. Cinematography support manifests a key element of BKM's media policy: providing a legal and political framework for the German film industry and filmmakers, preserving the national cinema heritage, strengthening the economic and cultural support for cinematography on behalf of the federal government, as well as international networking and liaising in the world of cinema.

## **3. DFFF (ger. *Deutscher Filmförderfonds*)<sup>232</sup>**

The German Federal Cinema Fund (DFFF) is a key actor in financing multiple German and international production companies. The BKM's financing scheme – with an annual budget of EUR 120 mln – renders reliable ground for the production of films successful both critically and commercially. DFFF offers two financing programs: DFFF I targets projects with total production costs of up to EUR 20 mln, and producers can receive a non-repayable grant of up to EUR 4 mln. Film production service companies hired to produce a film/film parts whose total production costs exceed EUR 20 mln can apply for DFFF II. Projects can be financed through a non-repayable grant of up to EUR 25 mln.

## **4. GMPF (German Motion Picture Fund)<sup>233</sup>**

Unlike BKM, the German Motion Picture Fund (GMPF) represents a funding scheme (annual budget of EUR 15 mln) for world-class and high-quality TV and VoD films and series. Producers of series with total production costs of at least EUR 1.2 mln per series, and producers of films

<sup>229</sup> *Idem.*

<sup>230</sup> *Idem.*

<sup>231</sup> <https://www.bundesregierung.de/breg-de>

<sup>232</sup> <https://www.dfff-ffa.de/en.html>

<sup>233</sup> <https://www.ffa.de/german-motion-picture-fund-2.html>

not intended for distribution with total production expenditure of at least EUR 25 mln are eligible for GMPF funding. The (non-repayable) grant for one film can amount up to EUR 2.5 mln, and up to EUR 4 mln for a series. The funded movies and TV shows shall be aired on television or available through VoD platforms operating in Germany.

BKM has several programs providing attractive financing opportunities for international co-production as well. DFFF and GMPF offer cover up to 25% of the production costs spent in Germany, and up to EUR 25 mln for the production of one film.

**Fig. 18. Main features of DFFF I, DFFF II and GMPF**

DFFF I	DFFF II	GMPF
<ul style="list-style-type: none"> <li>• Maximum project amount – EUR 4 mln;</li> <li>• For international co-productions with German co-producers;</li> <li>• German participation in co-production shall be at least 20%;</li> <li>• In case total production costs exceed EUR 20 mln, at least 20% of the total production costs are spent in Germany.</li> </ul>	<ul style="list-style-type: none"> <li>• Maximum project amount – EUR 25 mln;</li> <li>• For filmmaking service companies responsible for production of films costing at least EUR 20 mln;</li> <li>• German production costs for a film or its parts contracted to a German filmmaking service company shall be at least EUR 8 mln;</li> <li>• Financing of up to 25% of approved production costs in Germany.</li> </ul>	<ul style="list-style-type: none"> <li>• Maximum project amount – EUR 4 mln;</li> <li>• For producers of series with the cumulative self-cost of minimum EUR 1.2 per episode;</li> <li>• For producers of films not intended for cinema release, with the total production costs of at least EUR 25 mln per film;</li> <li>• Financing of up to 20% of approved production costs in Germany.</li> </ul>

### 8.2.3. Regional funds

Eight local film commissions operate in Germany's constituencies forming the national Film Commission Network<sup>234</sup>.

**Fig. 19. Germany's regional funds**

**I. Title:** Film-undMedienstiftung<sup>235</sup> (established in 1991)

**Territory:** Cologne, North Rhein Westfalia

**Annual budget:** EUR 40 mln<sup>236</sup>

**Equity holders:**

- WDR (Westdeutscher Rundfunk), public broadcasting agency in North Rhine Westfalia Region;
- Federal State of North Rhine-Westfalia;
- ZDF (Zweites Deutsches Fernsehen), state public broadcasting agency;
- RTL (Radio Television Luxembourg), public private broadcasting agency.

**Description:** West German Broadcasting is one of the leading film funding agencies in Germany and Europe. It supports films for cinema and television demonstration at all stages of production and distribution, as well as development of innovative audiovisual content and formats for other display formats. In addition, its competence includes the region's marketing and development, as well as dissemination of information about the region, its representation and networking on its behalf.

<sup>234</sup> More detailed information about the commissions is available at: <https://www.location-germany.de/en/Welcome#/>

<sup>235</sup> <https://www.filmstiftung.de/>

<sup>236</sup> [https://www.focusgermany.de/wp-content/uploads/2020/02/19\\_Focus\\_Web.pdf](https://www.focusgermany.de/wp-content/uploads/2020/02/19_Focus_Web.pdf)

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**2. Title:** Film Fernsehen Fonds Bayern<sup>237</sup> (FFF Bayern)

**Territory:** Munich, Bavaria

**Annual budget:** EUR 40 mln<sup>238</sup>

**Equity holders:**

- Free State of Bavaria;
- BLM (Bayerische Landeszentrale für neue Medien), Bavarian Agency for New Media Regulation;
- BR (Bayerischer Rundfunk), public radio and television company;
- ZDF;
- ProSiebenSat.1, media company;
- RTL;
- Sky, paid TV platform.

**Description:** FFF Bayern is a reliable financial partner of all media and creative companies in Bavaria. Support can be rendered at every stage of the production process, including development of scripts and projects, production of feature and TV films, international co-production of feature films and/or high-end series, web series and virtual reality, extended reality (XR) formats, as well as distribution and sales, support for cinemas, film festivals, and games.

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**3. Title:** Mitteldeutsche Medienförderung (MDM)<sup>239</sup>

**Territory:** Leipzig, Saxony, Saxony-Anhalt, Thuringia

**Annual budget:** EUR 15.5 mln<sup>240</sup>

**Equity holders:**

- Three states comprising Middle Germany (*ger. Mitteldeutschland*) (Saxony, Saxony-Anhalt and Thuringia);
- MDR (Mitteldeutscher Rundfunk), regional public TV company;
- ZDF.

**Description:** MDM (Central German Media Promotion) awards funding for promising films and media projects implemented in Saxony, Saxony-Anhalt and Thuringia. Funding schemes are available for all phases – from idea development up to production and distribution. To become eligible for a grant, production companies shall provide evidence of a promising impact on the cultural and economic spheres in one or more of the above three territories. As a rule, funds have to be returned unless project revenues are below a certain minimum.

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**4. Title:** Medienboard Berlin-Brandenburg<sup>241</sup>

**Territory:** Babelsberg, Brandenburg

**Annual budget:** EUR 38.8 mln<sup>242</sup>

**Description:** The main film and media industry agency in Germany's metropolitan area (Berlin-Brandenburg is the core media region for markets and festivals in Germany and abroad) maintaining transboundary and intersectoral relations. The Cinematography Financing Department provides funding for films, high-class drama series and film projects, as well as advises filmmakers on financing, and supports the overall film industry development. The New Media Financing Department issues financing for innovative audio-visual projects (e.g. games, multi-platform content, virtual and extended reality) and serial formats (fiction, entertainment and chronicle). In addition, Medienboard Berlin-Brandenburg likewise provides funding for regional media projects and events, awards, competitions, festivals, activities and conferences.

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<sup>237</sup> <https://www.fff-bayern.de/>

<sup>238</sup> [https://www.focusgermany.de/wp-content/uploads/2020/02/19\\_Focus\\_VWeb.pdf](https://www.focusgermany.de/wp-content/uploads/2020/02/19_Focus_VWeb.pdf)

<sup>239</sup> <https://www.mdm-online.de/index.php?id=aktuelles&L=1>

<sup>240</sup> [https://www.focusgermany.de/wp-content/uploads/2020/02/19\\_Focus\\_VWeb.pdf](https://www.focusgermany.de/wp-content/uploads/2020/02/19_Focus_VWeb.pdf)

<sup>241</sup> <https://www.medienboard.de/en/>

<sup>242</sup> [https://www.focusgermany.de/wp-content/uploads/2020/02/19\\_Focus\\_VWeb.pdf](https://www.focusgermany.de/wp-content/uploads/2020/02/19_Focus_VWeb.pdf)

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**5. Title:** Medien- und Filmgesellschaft Baden-Württemberg (MFG)<sup>243</sup>

**Territory:** Stuttgart, Baden-Württemberg

**Annual budget:** EUR 15 mln<sup>244</sup>

**Description:** The MFG's Filmmaking Funding Department reflects the agency's striving for promoting cinematography in Southern Germany by subsidizing production of film and television content, development of scripts, as well as distribution of games, documentaries and animated pictures. Numerous measures allow improving the infrastructure and contribute to the diversity of the Baden-Württemberg film industry. As part of its multi-vector funding policy, MFG primarily aims to promote animation and VFX industry. The Animation Media Cluster Region Stuttgart (AMCRS) – the animated media cluster of Stuttgart Region – founded as per the MFG initiative significantly contributes to close networking and multidisciplinary team work inside the sector. The Linear Production Fund supports the production of animated films in Baden-Württemberg, and is intended for line producers and suppliers of VFX and/or animation services for national and international film and TV projects with a high share of VFX created in Baden-Württemberg.

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**6. Title:** Filmförderung Hamburg-Schleswig-Holstein<sup>245</sup>

**Territory:** Hamburg, Schleswig-Holstein

**Annual budget:** EUR 15.9 mln<sup>246</sup>

**Description:** Supports cinema films, high-end TV shows and innovative audio-visual formats of all genres. Renders financial support at all stages of production process, from scenario to screen. The main focus is on the development of the regional audiovisual industry and invitation of filmmakers from around the world to make films in the region between the North and Baltic Seas.

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**7. Title:** HessenFilm und Medien<sup>247</sup>

**Territory:** Frankfurt am Main, Hessen

**Annual budget:** EUR 10.2 mln<sup>248</sup>

**Description:** As the central cinematography funding body in Hessen, as well as the first point of contact on all issues associated with cinema financing in Hessen, it supports both commercial and artistic filmmaking by creating optimal conditions for the creative industry. Based on the financial support, and the services on behalf of the Film Commission, Hessen Film also seeks to strengthen diversity. Its goal is to showcase the region's advantages beyond its borders. In addition to the Hessen Film and Cinema Prize, Hessen Film also strives for profitable cooperation with regional, national and European partners, as well as holds regular seminars and workshops, and represents Hessen at festivals in the region, Germany and Europe.

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**8. Title:** Nordmedia<sup>249</sup>

**Territory:** Hannover, Lower Saxony and Bremen

**Annual budget:** EUR 11 mln<sup>250</sup>

**Description:** The main activities of Nordmedia are financing, networking and development. As the central media funding agency in Lower Saxony and Bremen, since 2001 Nordmedia has been forming and consolidating the media industry in both of these Northern Germany states. As for the financing of cinematography and media, it is structured, organized and controlled in accordance with cultural and economic criteria. In this regard, Nordmedia provides financing for various stages of production of films, TV programs and interactive media projects. Funding requests are submitted by co-production partners located in Germany and/or in the financing region itself.

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dition to these large regional film funds and acknowledging this report's objectives, it is worth mentioning another small regional fund collaborating with projects from Central Asia – World Cinema Fund (WCF)<sup>251</sup>.

For over 15 years, jointly with the Federal Fund for Culture and in collaboration with the Goethe Institute, Ministry of Foreign Affairs and German producers, WCF has been developing and

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<sup>243</sup> <https://film.mfg.de>

<sup>244</sup> [https://www.focusgermany.de/wp-content/uploads/2020/02/19\\_Focus\\_Web.pdf](https://www.focusgermany.de/wp-content/uploads/2020/02/19_Focus_Web.pdf)

<sup>245</sup> <https://www.moin-filmfoerderung.de/en/>

<sup>246</sup> [https://www.focusgermany.de/wp-content/uploads/2020/02/19\\_Focus\\_Web.pdf](https://www.focusgermany.de/wp-content/uploads/2020/02/19_Focus_Web.pdf)

<sup>247</sup> <https://www.hessenfilm.de>

<sup>248</sup> [https://www.focusgermany.de/wp-content/uploads/2020/02/19\\_Focus\\_Web.pdf](https://www.focusgermany.de/wp-content/uploads/2020/02/19_Focus_Web.pdf)

<sup>249</sup> <https://www.english.nordmedia.de>

<sup>250</sup> [https://www.focusgermany.de/wp-content/uploads/2020/02/19\\_Focus\\_Web.pdf](https://www.focusgermany.de/wp-content/uploads/2020/02/19_Focus_Web.pdf)

<sup>251</sup> <https://www.berlinale.de/en/world-cinema-fund/home/profile.html>

supporting cinema in regions with poor cinematographic infrastructure, contributing to cultural diversity in German cinemas. The Fund supports films that cannot be produced without additional funding, e.g. films peculiar with non-traditional aesthetics, which tell powerful stories and convey the true image of their cultural origins. WCF exclusively supports the production and distribution of feature and feature films and full-length documentaries focusing on the following regions and countries: Latin and Central Americas, the Caribbean, Africa, the Middle East, Central Asia, Southeast Asia, the Caucasus, as well as Bangladesh, Nepal, Mongolia, and Sri Lanka.

In addition to the traditional WCF funding program, with the support of Creative Europe's Media it established WCF Europe connecting projects, directors and producers from WCF-funded regions with European producers.

WCF accepts full-length feature and creative full-length documentaries (at least 70 min duration) planned for distribution. Short films are not covered by WCF funding. The maximum financing for film production under the WCF amounts to EUR 60,000, and cannot exceed 50% of total production expenditure. If a submitted project is at the post-production stage, the maximum financing is limited to EUR 40,000.

This study did not aim to cover all existing filmmaking agencies operating in Germany, yet the ones presented for consideration can be of use to international filmmakers:

#### Focus Germany<sup>252</sup>

Founded in 1990 as the parent organization of the 8 largest regional film funds in Germany, Focus Germany provides filmmakers with all the important information about the agencies financing cinematography in Germany, as well as various possibilities for financing and producing films in the country. Focus Germany establishes all important contacts with the industry and service providers, from location search to post-production.

#### Animation Germany<sup>253</sup>

Animation Germany is an information and marketing agency of the German animation industry and VFX production abroad; its purpose is to facilitate increasing the number of contracts for joint production and maintenance of animation and VFX with international partners.

#### German Documentaries & German Documentary Association<sup>254</sup>

German Documentaries is an international label promoting German-made documentaries abroad. At the initiative of the German Documentary Association – AG DOK (*ger. Arbeitsgemeinschaft Dokumentarfilm*) and German Films Service+Marketing GmbH, German Documentaries themselves do not serve as distributors or global sales agents, but rather represent non-fiction films of various German licensees at international festivals and markets, as well as organize meetings on joint production and series production.

#### German Short Films<sup>255</sup>

The German Short Film Association (*ger. AG Kurzfilm*) supports the international promotion of German-made short meter, namely: their participation in film markets at film festivals in Clermont-Ferrand, Berlin, Cannes (Short Film Corner Program), Annecy; presenting German short films at German film festivals<sup>256</sup>; providing information on German short films presented at international film festivals and awards.

<sup>252</sup> <https://www.focusgermany.de/en/>

<sup>253</sup> <https://www.animationgermany.de>

<sup>254</sup> <https://german-documentaries.de> & [https://agdok.de/en\\_EN/home](https://agdok.de/en_EN/home)

<sup>255</sup> <https://www.shortfilm.de/en/>

<sup>256</sup> <https://www.german-films.de/activities/festivals-of-german-films/index.html>

## 8.3. Model of the Republic of Korea

### 8.3.1. Brief historical survey

The history of Korean cinematography – that started with the screening of short foreign films in the late 19<sup>th</sup> century – witnessed multiple tragic events, including colonization and war.

Based on the structural approach, Korea's post-war filmmaking can be divided into two main periods. From the late 1950's to the early 1990's, the film industry was barely supported by the *Chunmuro* producers (Seoul's creative street that originally hosted the main film studios) and regional distributors, who divided the country into six main regions. Since the mid-1980's, film production underwent liberalization and direct distribution of Hollywood pictures began. With the advent of national distribution in the mid-1990's, an integrated investment, cinematographic, distribution and rental framework was created, that marked a new beginning for Korean cinema, as well as helping to build its international brand<sup>257</sup>.

### 8.3.2. Key film industry organizations, principles of their operation and interaction. Financing mechanisms

#### KOFIC<sup>258</sup>

The Korean Film Council (KOFIC) is a special agency of the Ministry of Culture, Sports and Tourism of the RoK aimed at supporting the development and promotion of Korean films. KOFIC was founded in 1973 and consists of nine authorized representatives (permanent chairperson and 8 non-staff committee members) appointed by the Ministry of Culture, Sports and Tourism to review and decide upon the main issues related to Korean filmmaking development. KOFIC consists of the following separate departments focusing on different key aspects of Korean cinema:

- National Film Promotion Team supporting Korean films and film industry;
- International Promotion Team responsible for international public relations, promotion of Korean films abroad and international co-production;
- Cinematography Research and Development Team providing critical information in the form of statistics, analyses and publications;
- Korean Academy of Motion Picture Arts providing training and responsible for the continued education of cinematography specialists;
- KOFIC Namyangju Studio rendering services in the field of cinematography and possessing cutting-edge film production equipment;
- Technical Support Unit conducting research on the future of film technologies such as digital cinema and 3D films;
- General Management Unit managing the Korean Film Development Fund.

Korean filmmaking funding largely depends on equity financing, which does not guarantee payment of the principal amount, but is similar to interest payment against profit based on the investment amount. The main investor – copyright holder – is responsible for raising funds.

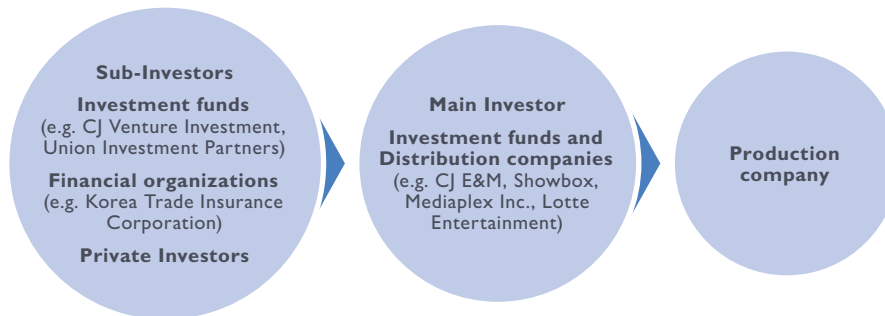
Equity financing of Korean filmmaking can be conditionally divided into three categories – by main investor, sub-investor, and the production company mobilizing funds on its own. The main investor is an investment company that owns distribution rights and uses the money raised by the production company for covering production costs, as well as the money allocated by sub-investor(s), and then ensures copyright compliance. It also manages production, guarantees its

<sup>257</sup> Trends in the Structure of the Korean Film Industry by Kim Mee Hyun, p. 413.

<sup>258</sup> <http://www.koreanfilm.or.kr/>

completion, executes the necessary expenditure and revenue calculations, and licenses rights. The sub-investor transfers a share of production costs to the main investor, and is entitled to receive a fixed percentage (share) of the profit derived from license sale, depending on participating interest.

**Fig. 20. Investment structure**

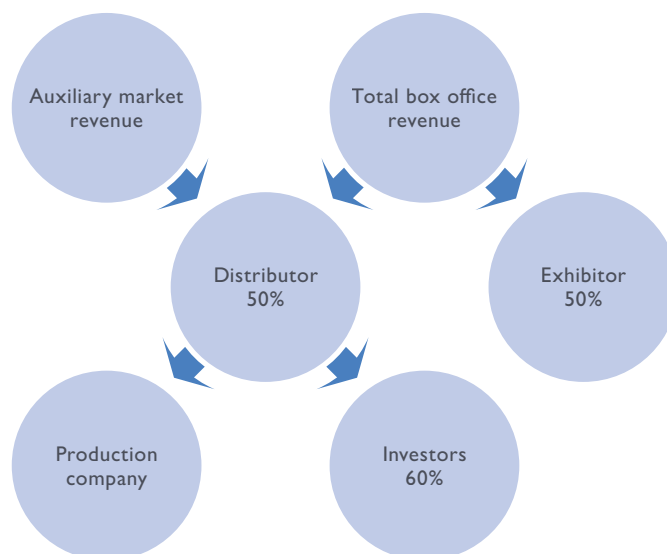


In Korea, visual content support funds run by venture capital firms act as sub-investors, playing a major role as financial investors in Korean film production. As a rule, they cover up to 40% of production costs. Visual Content Support Investment Funds have made a significant contribution to the development of the Korean film industry after 2001. For such funds, the established amount was available for a limited period of 5 to 7 years as reserve investment funds. These funds served as a successful tool for stabilizing investment in the film industry, as well as emerging as a substantial financing source.

The core investors in Korean filmmaking can be divided into three types:

- TYPE A: investor – producer – distributor – exhibitor;
- TYPE B: investor – producer – distributor;
- TYPE B: investor – producer.

**Fig. 21. Investor revenue distribution model**



Major investors in Korea receive 50% of the proceeds from ticket sales in cinemas, thus receiving most of the revenue from Korean-made films. After that, a distribution fee (approx. 10%) is deducted from the remaining profit, including the one received from auxiliary markets. Then,

the costs for production and marketing are reimbursed, and 60% of the net profit is distributed among (main and sub-)investors; the remaining 40% of the net profit goes to the production company that actually produced the film. Recently, the share of net profit of production companies has gradually fallen due to the growing dominance of major investors in the market.

### Preferences for foreign companies

Since 2011, KOFIC has provided preferences for filming that cover a share of expenditure associated with foreign feature films and TV series shot in Korea. KOFIC offers a cash grant of up to 25% to cover the costs of producing foreign audiovisual content spent on goods and services inside Korea<sup>259</sup>.

**Fig. 22. Shooting preferences awarded by KOFIC**

25% rebate	<ul style="list-style-type: none"> <li>• Over 10 shooting days in Korea;</li> <li>• Costs exceeding KRW 0.8 bln (USD 700,000).</li> </ul>
20% rebate	<ul style="list-style-type: none"> <li>• Over 3 shooting days in Korea;</li> <li>• Costs between KRW 50 mln (USD 44,000) and KRW 0.8 bln (USD 700,000).</li> </ul>

### Works satisfying requirements

Feature films, series and documentaries developed and produced by a foreign production company with foreign capital placement exceeding 80%:

- Feature film – a sequential set of images or video materials on a film, disc or digital medium with a minimum duration of 70 minutes, produced for display on a TV channel or public display streaming platforms in cinemas, cinema halls or similar facilities and/or via online streaming services;
- TV series – a series of dramatic productions or series shot for TV broadcasting or streaming services, with a pre-planned quantity of episodes united by a common theme or structure;
- Documentary – a documentary film produced for screening in cinemas, display facilities, either on television or online.
- Animation films, commercials, sporting and educational programs are not eligible.

### Eligible works shall satisfy the following criteria:

- Obtained approval from the Review Committee assessing, inter alia, the following three elements: (1) extent to which a work contributes to tourism (“tourism promotion”); (2) extent to which a work contributes to the Korean film industry (“quantitative contribution”); and (3) extent to which a foreign producer participates in the film production (“foreign participation”);
- At least KRW 100 mln (approx. USD 100,000) spent in Korea on production costs recognized by the Korean Film Council (“Qualifying Production Expenditure” or QPE). For a TV series, the production expenditure of all episodes can be combined;
- Filming in Korea for over 3 days.

### Who can apply

A corporation, e.g. organizations or enterprises, registered as a legal entity in the Republic of Korea and meeting the following requirements:

- A producer of film or video content recognized as such under the Film and Video Promotion Act, or an independent producer of audio visual works recognized as such under the Basic Law for the Promotion of the Cultural Industry;

<sup>259</sup> KOFIC Location Incentive for Foreign Audio-Visual Works – Guidelines 2021, Korean Film Council.

- A company that has signed a contract with a foreign production company for the provision of production services, and thus providing the services necessary for the production of a foreign audiovisual project inside Korea, which also manages the relevant financial account for the production. This company shall not be a Korean subsidiary or a Korean company financed by a foreign production company. Moreover, the above-mentioned foreign production company shall not be a branch of a Korean company or own more than 50% of its shares, shall not be its foreign subsidiary or a citizen of Korea.

### **KFCIN, Korean Film Commission and Industry Network**

Since the first film commission to offer film production support services appeared in 1999, film commissions located throughout Korea have expanded their national scope, as well as the range of film production support services. In 2004, a joint committee of 6 film commissions was founded – KFCIN (Korea Film Commissions & Industry Network). In 2011, its structure was updated to include 10 film commissions, as well as the Korean Film Producers Association (KFPFA), Korea Drama Production Association (CODA), Producers Guild of Korea (PGK) and Federation of Korea Movie Workers' Union (FKMWU), and form a non-governmental association responding in a flexible manner to industry changes and exerting influence over the government by way of policy proposals.

Local governments in Korea have regional commissions on cinematography. As of 2016, there were 12 filmmaking commissions located in large cities and offering a wide range of services necessary for film production, basically anything between assistance to producers in obtaining shooting permits down to regulating staff flow and hiring, and other types of assistance. Whereas certain filmmaking commissions provide funding for scenario development, office space for filmmakers, and preference programs to attract audiovisual content to Korea, others also have studios and post-production facilities.

The members of the Korean film commissions comprising the Korean Film Commission and Industry Network, are the following:

- Seoul Film Commission (SFC)<sup>260</sup>;
- Incheon Film Commission (IFC)<sup>261</sup>;
- Gyeonggi Film Commission (GGFC)<sup>262</sup>;
- Gangwon Film Commission (GWFC)<sup>263</sup>;
- Daejeon Film Commission (DFC)<sup>264</sup>;
- Cheongpung Film Commission (CFC)<sup>265</sup>;
- Chungnam Film Commission (CNFC);
- Busan Film Commission (BFC)<sup>266</sup>;
- Kennam Film Commission (GNFC);
- Jeonju Film Commission (JJFC)<sup>267</sup>;
- Jeonnam Film Commission (JNFC)<sup>268</sup>;
- Jeju Film Commission (JEJFC)<sup>269</sup>.

<sup>260</sup> <http://english.seoulfc.or.kr/Main/>

<sup>261</sup> <https://www.ifc.or.kr/en/>

<sup>262</sup> <http://www.ggfc.or.kr/en/>

<sup>263</sup> <http://www.gwfilm.kr/>

<sup>264</sup> <http://www.djfc.co.kr/>

<sup>265</sup> <http://www.cpfcc.or.kr/>

<sup>266</sup> <http://eng.bfc.or.kr/>

<sup>267</sup> <http://www.jjfc.or.kr/>

<sup>268</sup> <http://www.jnfc.or.kr/>

<sup>269</sup> <http://www.jejufc.or.kr/>

As per Korean Corporate Law<sup>270</sup>, there are only 4 ways in which foreign film producers can make films in Korea: through a representative office or branch in Korea, jointly with a Korean production company or as a production service customer:

- 1) *Establishment of a representative office*, i.e. a foreign company wishing to produce a film in Korea shall be registered in Korea as a foreign company and act as its legal representative;
- 2) *Establishment of a corporation in Korea*;
- 3) *Joint production with a Korean production company*. There are different forms of co-production with Korean production companies, and – depending on contract terms – different schemes are possible. A Korean partner production company can assume all obligations to invest in Korea, perform the necessary formalities, conclude contracts, and effectively and efficiently manage production. In addition, under certain conditions various financial benefits shall be granted under support programs offered by the Korean Film Council and regional film commissions;
- 4) *Situations related to the receipt of production services only*. There are several opportunities to contact Korean producers to find local production partners, including direct contact with producer associations, business meetings in the project markets at film festivals, or participation in the following KOFIC co-production support programs.

**Fig. 23. Ways of cooperating with Korean producers**

KOFIC's Ko-Production Programs	
Ko-Production is a mixed abbreviation of the words "Korea" and "joint production". It is a KOFIC program supporting international Korean co-products and strengthening bilateral cooperation between the countries involved. Organized by KOFIC, the program includes several industry events, such as project pitching sessions, seminars, producer workshops, business meetings and post-production presentations.	
Project Markets	
Asian Project Market <sup>271</sup>	NAFF (Network of Asian Fiction Films) <sup>272</sup>
Organized by the Busan International Film Festival and its Asian Film Market, the Asian Project Market is the largest project market in Korea, where filmmakers, producers, co-producers and financiers come together to find various business opportunities. It is dedicated to Asian cinema.	NAFF is an in-depth industry program specializing in Asian genre films, and taking place as part of the Puchon Science Fiction Film Festival (PiFan).
KFPA, Korean Film Producers Association <sup>273</sup>	
Founded in 1994, KFPA brings together producers running film production companies and having released at least one film. KFPA's main efforts include copyright protection, trust business, labor and management negotiations, etc.	
PGK (Producers Guild of Korea) <sup>274</sup>	
PGK is a united association founded in 2007 by the new generation of Korean producers. Its main activities include general education, implementing social programs for trade union members, as well as supporting cooperation with foreign filmmakers.	

Korea has signed joint production agreements with the following countries<sup>275</sup>: New Zealand (2008, 2015), India (2015), Australia (2014), China (2015), EU (2011), and France (2006).

<sup>270</sup> 2018 Korea Shooting Guide: <http://www.koreanfilm.or.kr/eng/coProduction/guide.jsp>

<sup>271</sup> <http://apm.asianfilmmarket.org>

<sup>272</sup> <http://naff.bifan.kr/eng/>

<sup>273</sup> [www.kfpa.net](http://www.kfpa.net)

<sup>274</sup> [www.pgk.or.kr](http://www.pgk.or.kr)

<sup>275</sup> <http://www.koreanfilm.or.kr/eng/coProduction/treaties.jsp>

### 8.3.3. General film industry statistics for 2018<sup>276</sup>

The total volume of the Korean film market, according to KOFIC, is formed by:

- 1) ticket sales for films shown in cinemas;
- 2) digital and internet market sales (core focus on TV VoD);
- 3) foreign sales (export of films and services).

Number of cinemas nationwide – 4,831;

Number of screens – 2,937;

Number of seats – 449,765.

Multiplex networks account for 79.5% of the total number of cinemas, 93.8% of the total number of screens, 97.6% of the total number of tickets sold, and 98.3% of sales.

The total volume of the Korean film market in 2018 was estimated at KRW 2.3764 trln.

The total box office was KRW 216.39 mln, including KRW 110.15 mln for Korean-produced films.

The average ticket price in 2018 was KRW 8.383.

The volume of the digital and internet market in 2018 reached KRW 473.9 bln.

**Fig. 24. Quantity of Korean-made films and imported foreign films, and their release**

Korean films			Foreign films			Total		
Q-ty of produced films	Q-ty of released films		Q-ty of imported films	Q-ty of released films		Q-ty of productions and imports	Q-ty of released films	
	Total	Actually released		Total	Actually released		Total	Actually released
<b>501</b>	<b>454</b>	<b>194</b>	<b>1.507</b>	<b>1.192</b>	<b>534</b>	<b>2.008</b>	<b>1.646</b>	<b>728</b>

- “Released films” means films whose number of screenings exceeds 40 sessions per year (daily screening during a week in one cinema gives about 40 sessions). This indicator was included in the accounting system in 2016;
- The above production and import data are based on the number of films reviewed by the Korea Media Rating Board in 2018. As such, these figures should not be replaced by the actual number of films produced and imported during the same year;
- Foreign films that were re-imported from another importer due to expiry of rights were included in these data as imported films;
- Production and import data are based on the number of films (exceeding duration of 40 minutes) reviewed by the Korea Media Rating Board in 2018. The rating is based on the changes in content, 3D- and dubbed versions, directorial editing and projects without editing, ScreenX films and extended versions;
- Foreign films produced in Korea were estimated to have spent at total of USD 3.39 mln in Korea.

<sup>276</sup> Korean Film Council. Status & Insight: Korean Film Industry 2018.



Project presentation during the "CONCEPT" Cinema Market of Projects" (2021.06.26). © Eldar Shibanov

### 9.1. VGIK (S.A. Gerasimov All-Russian State Institute of Cinematography): historical survey, schools, valid agreements with universities in Central Asia, statistics

S. A. Gerasimov All-Russian State Institute of Cinematography (*rus. abbr. VGIK*) is a federal state educational institution of higher education of the Russian Federation. VGIK was founded by the Russian Ministry of Culture and operates under its auspices.

VGIK was founded on September 1, 1919 as the State School of Cinematography. The Institute trains specialists in the field of "Culture and Art" under several higher (university), secondary professional and additional education programs. The training takes place either full-time or by correspondence. VGIK has three branches across the Russian Federation (in the cities of Sergiyev Posad, Rostov-on-Don, and Irkutsk). VGIK is the only state film school in Russia possessing a powerful production and technical base represented by the Training Film Studio.

VGIK trains specialists in the following specialties (higher education):

**Fig. 25. Disciplines offered at VGIK**

Directingv	<ul style="list-style-type: none"> <li>• Fiction Film Directing Department;</li> <li>• Non-fiction Film Directing Department;</li> <li>• Sound Engineering Department;</li> <li>• Television Department</li> </ul>
Acting	<ul style="list-style-type: none"> <li>• Acting Department;</li> <li>• Stage Speech Department</li> </ul>
Artistic	<ul style="list-style-type: none"> <li>• Film and TV Artist; Artist of process shooting (major: painting);</li> <li>• Film and Television Costume Designer (major: painting);</li> <li>• Animated Film Artist (major: graphics)</li> </ul>
Cinematography	<ul style="list-style-type: none"> <li>• Cinematography Department</li> </ul>
Animation and Multimedia	<ul style="list-style-type: none"> <li>• Qualification: Director of Animation &amp; Computer Graphics. Teacher;</li> <li>• Qualification: Multimedia Director. Teacher;</li> <li>• Qualification: Animation &amp; Computer Graphics Designer</li> </ul>
Screenplay and Film Studies	<ul style="list-style-type: none"> <li>• Film Dramatic Art Department;</li> <li>• Film Research Department</li> </ul>
Producing	

VGIK likewise offers career guidance courses, inter-faculty departments and laboratories, VGIK's advanced film and television courses, center for continuing education and advanced training of creative and management personnel in the field of culture, as well as graduate and doctoral study programs.

VGIK has 19 contracts and cooperation agreements with the CIS and other countries. In the Central Asian countries, VGIK's partners include:

- T.K. Zhurgenov Kazakh National Academy of Arts (KazNAL, Almaty, Kazakhstan);
- Turan University (Almaty, Kazakhstan);
- Kazakh National University of Arts (KazNUI, Nur-Sultan, Kazakhstan);
- M. Tursunzade Tajik State Institute of Culture and Arts (TGIKI, Dushanbe, Tajikistan);
- State Institute of Arts and Culture of Uzbekistan (GIKUz, Tashkent, Uzbekistan);
- Uzbekfilm National Agency of the Republic of Uzbekistan (Tashkent, Uzbekistan).

During 2017–2020, within the framework of cooperation with Central Asian universities the following events were held:

**Fig. 26. Joint event by VGIK and its partners in Central Asia**

2017	
Kazakhstan	<ul style="list-style-type: none"> <li>• Turan University: directing master class;</li> <li>• KazNAL: internship of 5 undergraduate students under the Drama Program of VGIK's Screenplay and Film Studies School</li> </ul>
2018	
Kazakhstan	<ul style="list-style-type: none"> <li>• KazNUI: internship of 2 undergraduate students at VGIK's Screenplay and Film Studies, and Production;</li> <li>• Participation of students in the animation section of VGIK summer film school in Krasnodar;</li> <li>• VGIK Days in Kazakhstan (Almaty, Nur-Sultan): official meetings, joint class-concert, 3 student performances, master classes</li> </ul>
Uzbekistan	<ul style="list-style-type: none"> <li>• Official visit of the delegation comprising government officials and representatives of the State Institute of Arts and Culture;</li> <li>• VGIK Days in the Republic of Uzbekistan (Tashkent): official meetings ministry representatives, screenings, master classes, joint classes, class-concert</li> </ul>
2019 – Dedicated to the 100 <sup>th</sup> VGIK's Anniversary, a series of offsite events with the participation of VGIK faculty members were held in the Central Asian countries	
Kazakhstan	<ul style="list-style-type: none"> <li>• Participation of students in the animation section of the VGIK Summer Filmmaking School in Svetlogorsk</li> </ul>
Uzbekistan	<ul style="list-style-type: none"> <li>• Opening of VGIK Creative Center at the State Institute of Arts and Culture;</li> <li>• Visit of Uzbek filmmakers to VGIK;</li> <li>• Participation of students in the animation section of VGIK Summer Filmmaking School in Svetlogorsk;</li> <li>• Participation of the VGIK Rector in the first meeting of the Sub-Commission on Culture under the Intergovernmental Commission on Economic Cooperation between the Russian Federation and the Republic of Uzbekistan</li> </ul>
Tajikistan	<ul style="list-style-type: none"> <li>• VGIK Days in CIS Countries. The Centenary Anniversary of the World's First Filmmaking School (Dushanbe): official meetings, master classes, film screenings of student films, exhibitions, opening of VGIK Film Club, joint classes, staging of a student performance, class concert</li> </ul>
2020	
Kazakhstan	<ul style="list-style-type: none"> <li>• Participation in the flash mob as part of the celebration of the 75<sup>th</sup> Anniversary of the Victory in the Great Patriotic War</li> </ul>
Uzbekistan	<ul style="list-style-type: none"> <li>• Participation in the flash mob as part of the celebration of the 75<sup>th</sup> Anniversary of the Victory in the Great Patriotic War</li> <li>• 7 young filmmakers from Uzbekistan were admitted to study at VGIK as per the memorandum between VGIK and Uzbekfilm NA</li> </ul>

The successful integration of VGIK into the international filmmaking educational community is to an extent facilitated by VGIK's membership in CILECT (UNESCO's International Association of Film and Television Schools (*fr. Centre International de Liaison des Ecoles de Cinéma et de Télévision*)).

During 2017–2020, 29 persons from Central Asian countries became VGIK students, including 19 from Kazakhstan (11 female, and 8 male), 4 from Kyrgyzstan (1 female and 3 male), 3 from Tajikistan (1 female and 2 male), and 3 from Uzbekistan (3 male)<sup>277</sup>.

## 9.2. New York Film Academy (NYFA)

The New York Film Academy was founded by veteran producer Jerry Sherlock in 1992. Mr. Sherlock designed the Academy to be not only accessible, but, even more importantly, operating based on the learning-by-doing principle. This hands-on approach applies to all NYFA programs offered today; the students work with equipment that meets industry standards and in first-class conditions. NYFA promotes visual literacy and visual storytelling through intensive practice-based training, as well as striving to provide education to the most diverse, international and wide range of students, honing the skills of future professionals.

NYFA has been expanding its curriculum as well as its global presence, and has five active campuses and multiple programs around the world (New York, Los Angeles, South Beach, Harvard University (US); Gold Coast (Australia); Florence (Italy); Paris (France); Moscow (Russia); and Shanghai, Beijing (China).

**Fig. 27. Bachelor Programs (BFA, BA, AFA) at the New York Academy of Motion Picture Arts<sup>278</sup>**

Film directing	Film acting	Producing	Screenwriting
Cinematography	Photography	3D animation and visual effects	Design and computer games
Graphic design	Documentary directing	TV and radio journalism	Musical theater
Digital editing		Visual reality	Media education

Master's degree programs are also available<sup>279</sup>: Master of Fine Arts (MFA) and Master of Arts (MA).

In addition, NYFA offers summer camp programs (teenage camps, children's camps, online youth seminars), short-term workshops (8-, 6-, 4-, 3-, 2-, and 1-week, and 12-week evening courses; online seminars, lifelong learning), conservatory programs (1-year conservatory, 2-year conservatory, lifelong learning), special joint projects with other companies and organizations<sup>280</sup>, as well as the Study Abroad Program.

NYFA's International Pathway Programs<sup>281</sup> is also worth highlighting. They were launched in the fall of 2020<sup>282</sup>, and are intended for foreign students who are not native English speakers and are interested in entering NYFA's degree courses (bachelor's or master's). The Programs' admission conditions are similar to the Academy's general admission rules, except for the English

<sup>277</sup> Information provided by VGIK on request at the time of report preparation.

<sup>278</sup> The list of schools/departments differs in different campuses and branches.

<sup>279</sup> <https://www.nyfa.edu/graduate-programs>

<sup>280</sup> <https://www.nyfa.edu/special-projects/>

<sup>281</sup> <https://www.nyfa.edu/admissions/international-students/pathway-programs.php>

<sup>282</sup> Information provided by NYFA on request at the time of report preparation.

proficiency requirements. The Programs help students improve their English skills thanks to studying in the English language environment, acquainting them with the US student environment, as well as US culture and life on and around NYFA US-based campuses. At the time of this study, there were 8 International Pathway students (6 undergoing MA, and 2 – BA studies)<sup>283</sup>.

There are many options for eligible candidates to finance their training at NYFA, including educational counselling, and winning grants and scholarships.

- *Need Based Tuition Assistance* is available to students with confirmed financial need to help reduce tuition costs under long-term NYFA programs, including 1- and 2-year conservatory programs, as well as AFA, BA, BFA, MA, and MFA degree programs;
- *Talent Based Tuition Award* is available to applicants selected based on their exceptional abilities meeting the requirements of a selected program;
- *Merit Based Tuition Award* is available to students eligible for BA and BFA degrees;
- *Matthew Modine Masters Scholarship* is available to students seeking the MFA degree in film directing and acting;
- *Federal Financial Assistance* is available to US citizens and non-US citizens fulfilling the requirements.

Public grant programs:

- International Financial Student Assistance, the list of eligible countries is on the official website<sup>284</sup>. In the Central Asian countries, assistance is available in Kazakhstan (via the Bolashak Program), Uzbekistan (Islam Karimov Foundation), and in Turkmenistan (via the American Council). During 2018–2021, under the Bolashak Program 8 individuals were admitted to NYFA<sup>285</sup>;
- Veteran Post-9/11 GI Bill, provides education grants (up to 36 months) under the approved Post-9/11 GI Bill programs;
- Private student loans.

NYFA's student population comprises students from over 80 countries of the world; more than 50% of the student population is international<sup>286</sup>. NYFA campuses in Los Angeles and South Beach host students representing over 120 different nationalities<sup>287</sup>.

On average, the annual number of students under all types of US-based programs exceeds 1,500 persons (70% of whom are undergoing BFA and MFA courses). Central Asian students at NYFA mainly include those from Kazakhstan and Uzbekistan. Since 2017 till present, 91 students from Kazakhstan, 2 from Kyrgyzstan, and 5 from Uzbekistan have been enrolled at NYFA<sup>288</sup>.

According to NYFA, in 2019, 31 students from Kazakhstan studied at the Academy (BA – 1, BFA – 12, MA – 2, MFA – 10, 1-year programs – 6)<sup>289</sup>.

In 2020, 15 students from Kazakhstan studied at NYFA campuses (BA – 1, BFA – 5, MA – 1, MFA – 6, 1-year programs – 3), and 2 students from Uzbekistan (2-year program)<sup>290</sup>.

<sup>283</sup> *Idem*.

<sup>284</sup> <https://www.nyfa.edu/admissions/international-students-financial-aid.php>

<sup>285</sup> Information provided by NYFA on request at the time of report preparation.

<sup>286</sup> <https://www.nyfa.edu/admissions/international-student.php>

<sup>287</sup> <https://www.nyfa.edu/>

<sup>288</sup> Information provided by NYFA staff, Jim Miller (Vice President, Strategic Initiatives).

<sup>289</sup> Information provided by NYFA on request at the time of report preparation.

<sup>290</sup> *Idem*.

In 2021, the number of Central Asian students at NYFA's US campuses includes 17 from Kazakhstan, including 15 female and 2 male (BFA – 10, MFA – 3, 1-year programs – 4), and 1 person (female) from Uzbekistan (BFA)<sup>291</sup>.

### 9.3. Film and TV School of the Academy of Performing Arts in Prague (FAMU)

The Film and Television School of the Academy of Performing Arts in Prague (FAMU) – established in 1946 thanks to the efforts of the then most famous Czech filmmakers – is the oldest in Europe. In the early 1960's, it became a “true nursery” for young creative workers, who later became famous as the Czechoslovak “New Wave”. The fifth oldest European filmmaking school, FAMU operates as one of the departments of the Academy of Performing Arts (DAMU, FAMU, and HAMU)<sup>292</sup>.

FAMU is a founding member of the International Association of Film and Television Schools (CILECT), European League of Institutes of the Arts (ELIA), European Grouping of Film and Television Schools (*fr. Groupement européen des écoles de cinéma et de télévision* (GEECT), and European Film Academy, as well as a permanent member of the Czech Society for Film Studies (CEFS). FAMU plays an important role in attracting its teachers and researchers to international professional organizations; collaborates with Czech Television, as well as foreign TV companies. FAMU is also a permanent member of the Association for Film and Audiovisual Education.

FAMU offers 6 accredited training programs, and has 11 departments teaching 12 courses in Czech and 4 courses in English<sup>293</sup>. The departments are listed below:

- Department of Directing;
- Department of Cinematography;
- Department of Documentary Film;
- Department of Production;
- Department of Editing;
- Department of Photography<sup>294</sup>;
- Department of Sound;
- Department of Animated Film;
- Department of Scriptwriting and Dramaturgy;
- Center for Audiovisual Studies;
- FAMU International.

Master's studies are possible for the following majors: directing, editing, camera art, photography.

FAMU operates an in-house studio, Studio FAMU, fitted with professional film and television equipment.

FAMU offers a 1-year Academy Preparation Programme (APP), summer courses, CIEE and CET programmes<sup>295</sup>, Erasmus+ exchange programme and Free Mover programme. In view of the specific scope of this study, additional information on some of them is provided below.

<sup>291</sup> *Idem*.

<sup>292</sup> Information provided by FAMU on request during the study.

<sup>293</sup> <https://www.famu.cz/en/>

<sup>294</sup> Currently, the only English-language bachelor's program offered by FAMU.

<sup>295</sup> <https://www.famu.cz/en/departments/famu-international-fi/cet-ciee/>

## Erasmus+

FAMU participates in the EU's Erasmus+ Programme, in particular, in the student exchange sub-programme. Under valid bilateral agreements, foreign students are admitted from partner schools in 18 EU countries<sup>296</sup> and Turkey. Exchange stay duration can be one or two semesters; the application deadline is mid-May each year.

## Free Mover<sup>297</sup>

This programme is intended for students outside the EU. FAMU accepts foreign students from schools with which a mutual cooperation agreement has been signed. At the moment, they are located in India, Argentina, Israel, US, Canada, Japan, Lebanon, Taiwan, and Germany; the corresponding schools offer funding under the programme<sup>298</sup>. The programme takes place in the form of student internship allowing students considerable freedom on choosing the scope of training or other activities related mainly to thesis execution or implementing an art project, etc. The usual internship duration is 3 months (1 semester).

## APP<sup>299</sup>

This 1-year Preparation Programme of the FAMU International Department aims to provide its participants with the opportunity to study and get acquainted with a wide range of crafts, professions, arts and skills comprising the cinematic/photographic art, both practically and theoretically. The APP enrolled students shape their own curriculum based on a combination of required, or mandatory, and optional courses, workshops and projects corresponding to students' chosen Main Directions.

Main Directions for 2021/2022 include the following:

- Scripting skills;
- Feature film directing;
- Documentary and non-fiction film directing;
- Cinematography;
- Editing and creative post-production;
- Photography;
- Animated film;
- Introduction to sound engineering.

Students from any country can apply for the programme. Training at FAMU for foreign students is tuition-based.

During 2018–2020, 325 (bachelor's, master's, PhD) students graduated from FAMU, including 95 foreign students. The number of students studying under other programmes was as follows: Erasmus+ – 87 persons, APP – 62 persons, CET – 80 persons, CIEE – 80 persons, summer schools – 169 persons, and other non-accredited programmes – 212 individuals<sup>300</sup>.

Based on information obtained in the course a personal interview with Giovanni Robianno, former Head of FAMU International (2015–2018), in recent years 2 students from Central Asia (Kyrgyzstan, Kazakhstan) were able to participate in FAMU educational programs: 1 student studied under the APP Programme in 2016; and 1 student underwent the Cinemadance course in 2017, held at FAMU twice a year.

<sup>296</sup> <https://www.famu.cz/en/studies/studies-and-internships-abroad/famu-partner-schools/>

<sup>297</sup> The programme is currently suspended.

<sup>298</sup> <https://www.famu.cz/en/studies/studies-and-internships-abroad/famu-partner-schools/>

<sup>299</sup> <https://www.famu.cz/en/departments/famu-international-fi/one-year-courses/academy-preparation-program/>

<sup>300</sup> Information provided by FAMU on request at the time of report preparation.

# 10. EUROPEAN INDUSTRY-SPECIFIC EDUCATION PROGRAMMES POTENTIALLY INTERESTED IN THE CENTRAL ASIAN REGION



Shooting of the movie "Pure Coolness". © Ernest Abdyjaparov

## 10.1. Berlinale Talents at the Berlinale Film Festival

Founded in 2003, Berlinale Talents represents a training and advanced training programme for filmmakers and creators of drama series, taking place at the Berlinale Film Festival.

Every year, the programme selects 250 novice filmmakers who gather in Berlin to share their artwork and sharpen their skillset, as well as network with colleagues and create new projects.

To participate in the programme, a filmmaker's list of implemented projects should include 1 full-length film, 2 short films or 1 high-quality drama series that were shown internationally or received awards. Students can participate in the programme only in exceptional cases, for instance, if they have previously worked in filmmaking.

The programme's packed agenda includes lectures, meetings, seminars, speeches and events to establish business contacts organized jointly by the European Film Market<sup>301</sup>, World Cinema Fund<sup>302</sup> and Berlinale Co-Production Market<sup>303</sup>.

**Fig. 28. Berlinale Talents Programme Structure**

Summit	<ul style="list-style-type: none"> <li>• Lectures by world-renowned filmmakers and cultural figures;</li> <li>• Discussions: small interactive meetings and live workshops where experts analyze case studies by discussing best practices and providing filmmakers with the tools they need to keep abreast of the ever-changing industry;</li> <li>• Films: selection of Berlinale Talents alumni films officially invited to this year's festival</li> </ul>
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<sup>301</sup> <https://www.efm-berlinale.de/en/home/homepage.html>

<sup>302</sup> <https://www.berlinale.de/de/world-cinema-fund/home/profil.html>

<sup>303</sup> <https://www.efm-berlinale.de/en/copro-market/profile/profile.html>

Talents Lab	<p>Participants may submit an in-the-works project to one of the following talents labs<sup>304</sup>:</p> <ul style="list-style-type: none"> <li>• Doc Station (10 projects);</li> <li>• Short Form Station (10 projects);</li> <li>• Script Station (10 projects);</li> <li>• Talent Projects market (10 producers).</li> </ul>
Studios	<p>Intensive one-day workshops:</p> <p>Acting Studio, Camera Studio, Editing Studio, Market Studio, Production Design Studio, Sound Studio, Talent Press (for film critics and journalists)</p>
Networking	<ul style="list-style-type: none"> <li>• Talents Circles (focusing on a theme or region);</li> <li>• Talents Pools</li> <li>• Dine &amp; Shine, the traditional dinner gathering over 400 guests and involving a seating change after each course;</li> <li>• Meet the Expert, rich sessions rendering ample opportunities to personally talk with expert practitioners</li> </ul>

The Talents Footprints programme was created based on and to support the 17 United Nations' Sustainable Development Goals<sup>305</sup>. The programme allows participants showcasing and further advancing their own social initiatives related to cinema in several key areas: gender equality and diversity, quality education and employment, combating climate change, peace, justice and mutual understanding.

- The Mastercard Enablement Programme<sup>306</sup> provides the three selected fellows with the opportunities to get consultations, financial support and raise public awareness of their seminars, campaigns and/or filmmaking networking that contribute to their local communities;
- Kompagnon Fellowship<sup>307</sup> is supported jointly by the *Perspektive Deutsches Kino* and Berlinale Talents, and is open to writers and directors from Germany who were selected to participate in the latest *Perspektive Deutsches Kino* program or participated in the Script Station, Doc Station or Short Form Station project this year within the framework of the Berlinale Talents program;
- The portal of the Berlin Film Residencies<sup>308</sup>, initiated by the Medienboard<sup>309</sup>, Nipkow Program<sup>310</sup> scholarship program and Berlinale Film Festival, offers an overview of the various scholarships awarded to filmmakers in Berlin and filmmakers from Berlin;
- Festival activity<sup>311</sup>;
- Talent projects.

The Berlinale Talents programme has over 8,500 alumni worldwide<sup>312</sup>. In the course of its existence, 14 individuals from Kazakhstan, 5 from Kyrgyzstan, 2 from Tajikistan, and 3 from Uzbekistan<sup>313</sup> took part in it representing the Central Asian countries.

<sup>304</sup> <https://www.berlinale-talents.de/bt/page/c/labs>

<sup>305</sup> <https://sdgs.un.org/goals>

<sup>306</sup> <https://www.berlinale-talents.de/bt/page/c/mep>

<sup>307</sup> <https://www.berlinale-talents.de/bt/page/c/kompagnon-fellowship>

<sup>308</sup> <https://www.berlinale-talents.de/bt/page/c/berlin-film-residencies>

<sup>309</sup> <https://www.medienboard.de/en/>

<sup>310</sup> <https://nipkow.de/welcome/>

<sup>311</sup> <https://www.berlinale-talents.de/bt/page/c/festival-activities>

<sup>312</sup> <https://www.berlinale-talents.de/bt/page/c/our-mission>

<sup>313</sup> <https://www.berlinale-talents.de/bt/find/talent>

Following the example of the Berlinale Talents, similar programmes are operating in 7 countries as its adapted analogues: in Buenos Aires (Talents Buenos Aires at the Buenos Aires International Festival of Independent Cinema, BAFICI); in Durban (Talents Durban); in Beirut (Talents Beirut); in Guadalajara (Talents Guadalajara within the framework of the Guadalajara International Film Festival, FICG); in Sarajevo (Talents Sarajevo as part of the Sarajevo Film Festival); in Tokyo: (Talents Tokyo within TOKYO FILMeX Festival), and in Rio de Janeiro (RioTalent of Press Rio).

## 10.2. OpenDoors<sup>314</sup> at the Locarno Film Festival

In 2020, the Open Doors programme celebrated its 18<sup>th</sup> anniversary. The programme is implemented with the support of the Swiss Agency for Development and Cooperation (SDC) of the Federal Department of Foreign Affairs (FDFA).

Programme objectives:

- Draw the attention of industry professionals and international audiences to directors and films from Southern and Eastern countries;
- Create optimal conditions for the implementation and distribution of feature films through the discussion and professional exchange platform facilitating contacts among colleagues in Europe and other countries as potential partners;
- Promote the development of a local and regional independent cinematographic environment, as well as link representatives of corresponding industries with a worldwide network of colleagues.

This tripartite work is complemented by promotion efforts and professional training seminars in the region, selected in close cooperation with local agencies.

In 2019–2021, the Open Doors programme of the Locarno Film Festival has been focusing on the cinematography of Southeast Asia and Mongolia. Over the past three years, it has been paying special attention to film projects, specialists and producers from the following countries: Laos, Thailand, Cambodia, Vietnam, Myanmar, Indonesia, Malaysia, the Philippines, and Mongolia.

Structure of the 6-day Open Days programme:

- 1) Open Doors Hub – an international co-production platform for 8 selected projects. On the last day, the professional jury awards several winning projects for development, production or post-production, namely the Open Doors Grant of CHF 50,000, CNC Prize for project development of EUR 8,000, international Arte Kino Prize of EUR 6,000<sup>315</sup>, etc.;
- 2) Open Doors Lab selects 8 producers/cinematographers who are invited to Locarno to participate in a personal program focused on the work of a creative producer. The program provides the participants with tools to better understand the project work at the stage of its elaboration and work with international cinematography professionals, while simultaneously boosting their entrepreneurial competencies;
- 3) Open Doors Screenings is a non-competition section with the focus (in 2021) on selecting films from the following countries: Laos, Thailand, Cambodia, Vietnam, Myanmar, Indonesia, Malaysia, the Philippines, and Mongolia.

<sup>314</sup> <https://www.locarnofestival.ch/LFF/pro/projects/open-doors.html>

<sup>315</sup> <https://www.locarnofestival.ch/LFF/pro/projects/open-doors/hub.html>

Likewise, the Open Doors offers additional programmes available throughout the year, namely:

- *Open Doors Consultancy* offers individual professional online consultations by international experts for film projects and creative teams at various stages under the following themes: script writing, co-production and its financing strategy, editing, international distribution (sales, festivals), legal aspects and contracts, creative production. The 2021 consultation sessions focus on Afghanistan, Bangladesh, Bhutan, Vietnam, Indonesia, Cambodia, Laos, Malaysia, Myanmar, Mongolia, Thailand, the Philippines, and Sri Lanka;
- *Open Doors ToolBox* is a free online consultation platform designed to provide a space and training center for directors and producers to acquire new knowledge related to their artwork, as well as opportunities to advance their projects (e.g. through international funds, development seminars or after selection for participation in festivals); facilitate the development and extend support to a vast community of fellow filmmakers. The toolkit is available to cinematography professionals from Mongolia, Afghanistan, Bangladesh, Pakistan, Bhutan, Nepal, Sri Lanka, Maldives, Myanmar, Cambodia, Thailand, Laos, Vietnam, Indonesia, Malaysia, the Philippines, Brunei, Timor-Leste, and Singapore;
- *Hotline Service* is available all year round based on written requests to the Open Doors team. It allows asking questions and getting feedback on the specific aspects of ongoing projects, a filmmaker's career, as well as can assist at various stages of the filmmaking process. All specialists from target regions can utilize the hotline, regardless of whether they have already participated in the Open Doors programme or not.

### 10.3. Produire au Sud (PAS) at the Festival des 3 Continents

The *Produire au Sud* (PAS) Programme – launched in 2000 under the Festival of 3 Continents (Nantes, France) – manifests a training seminar on the development and creation of joint-production film projects.

The Programme aims to introduce young/emerging producers and filmmakers working in Africa, Asia and Latin America to various key tools and international co-production models through group work and personal coaching on their specific projects. The PAS Programme strives to create a network of young producers from three main continents (Asia, Africa and Latin America) and lay the groundwork for close collaboration between European film professionals and aspiring professionals from the South.

- The PAS Seminar in Nantes, held within the framework of the Festival of 3 Continents, is a 7-day training seminar offering various master classes in film production with the participation of European professionals;
- Marketing workshop, including pitch training and training on public project presentation to potential producers;
- Consultations on screenwriting and filmmaking with 2-day individual analysis and feedback from writers and producers familiar with co-production.

Each seminar is conducted by international professionals, such as producers, legal scholars, distributors, sales agents, screenwriters, pitch experts, etc.

Every year since 2000, the Programme has selected 6–8 teams of production directors from Africa, the Middle East, Asia and Latin America to develop their projects under the guidance of European cinematography professionals<sup>316</sup>.

Throughout the year, jointly with international film festivals PAS also organizes seminars abroad. Since 2014, such events have been annually held in India, Israel, Morocco, South Africa, Thailand, and Taiwan. One-time PAS labshave been organized in Lebanon, Mexico, Algeria, Argentina, Venezuela, Brazil, and Kenya.

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<sup>316</sup> <https://www.3continents.com/en/produire-au-sud/rechercher/universitaire-en-residence/>

The growing interest in the Cultural and Creative Industries in the world, as well as in Central Asia requires new studies of their actual state and potential for the economic recovery of the region during and after the COVID-19 pandemic. This unique study provides a comprehensive overview of the current state of the film industries of Kazakhstan, Kyrgyzstan, Tajikistan and Uzbekistan and provides a certain number of recommendations for their future development.

