

BULGARIAN CINEMA 2012

FACTS / FIGURES / TRENDS

EDITORIAL

This special edition, prepared by the Bulgarian National Film Centre in conjunction with MEDIA desk – Bulgaria, and with the help of the Observatory of Cultural Economics – Bulgaria, presents the current state of affairs in Bulgaria's audiovisual industry.

We did our best to offer more information both about the training in the field of cinema studies and the financing opportunities in this country, as well as about gaining support outside Bulgaria, the recent Bulgarian productions and their success, about the TV environment and the legislation. This year, we offer an exclusive analytical study (Chapter XI), conducted by the Observatory of Cultural Economics, which we deem to be important, as it considers the Bulgarian film industry to be a driving force of economic growth. We believe that the booklet could expand on the idea of the processes taking place in Bulgarian film industry.

We also believe that the reference information, providing addresses and contact details of producers, festivals, distributors and institutions, could prove helpful to our readers to establish contact and enter into dialogue with their Bulgarian colleagues more easily.

I LEGISLATION

The system of administrative structure of management and the existing legislation, regulation and procedures form the institutional and legal environment for development of the Bulgarian film industry.

Regulatory framework at national level

Two periods of building the current national institutional framework are distinguished:

- The 1990s, when the legal framework of the sector has been amended on more than one occasion, partially though: for example automatic subsidizing of co-productions was introduced at the time (1994).
- This decade, when an integral specialized regulatory framework started being developed. Over the decade, Bulgarian culture obtained its own sector law, the *Law on Protection and Development of Culture* (1999, in force as of 2000), while in 2003 a special law on Bulgarian cinema was passed: the *Film Industry Act*.

The audiovisual sector and in particular, the audiovisual goods and services have dual cultural and economic nature and their regulation is a projection of the entire economic infrastructure. So, in view of the considerable number of legal instruments intended for the sector, the legislation at national level should be divided into *direct* and *indirect* pertaining to its impact.

The direct legislative instruments, providing the main structures of organization, management and financing are as follows:

- *The Law on Protection and Development of Culture (1999)*, where for the first time ever the term “producership in culture” has been introduced and all forms of funding have been provided, as well as the equality of public and private subjects in regard to state support.
- *The Film Industry Act (2003, recently amended in 2009)*, which provides for a stable environment of development of the national film industry through projects and indirect measures, facilitating the overall process of making a film production, from the idea to the promotion. The financial stability is guaranteed by the mechanism set in Article 17, under which the amount of the annual subsidy shall not be less than the total of the previous-year average budgets of 7 feature films, 14 full-length documentaries and 160 minutes

animation respectively. Under the Film Industry Act the Bulgarian National Film Center was transformed into an Executive Agency with an information office under the MEDIA program as well as seven public registers.

- *The Radio and Television Law (1998)* regulates the functioning of public and commercial radio and TV broadcasters. As regards the national audiovisual policy, here a framework is set of several important regulatory and protectionist measures: the share of broadcasting time of European works and those made by independent producers, as well as the obligation of the public broadcaster, the Bulgarian National Television (BNT) to support the making and exhibition of national audiovisual production with no less than 10% of the subsidy for the (BNT) slated for making of Bulgarian TV films. In 2009, changes and amendments to the Radio and Television Law were passed along with such to the related to it.
- *Electronic Communications Act (2007)*. The amendments are related to the development of a new regulatory framework, indispensable for the introduction of digital television in Bulgaria. As a result, in the early 2010, the Council for Electronic Media (a national regulator) launched a procedure to issue digital licenses for TV national broadcaster. With the amendments to the *Electronic Communications Act* of 29 December 2011, analogue television broadcasts switch-off date is set for 1 September 2013.
- *The Copyright and Neighboring Rights Act (1993)* recently amended in 2009, sets the framework for the market of intellectual products and the related to these non-property and property rights. Film industry is a chain of authors, creating value on a number of differentiated, though related markets and this Act protects and unites the creators also through the opportunity to establish collective bodies of managing the rights, both copyright and neighboring rights (Filmautor, Artistautor, ProPhon, etc.).
- A natural and important extension of the previous law is *The Act on Administrative Regulation of the Manufacture and Trade in Optical Disks, Stampers and Other Storage Media Loaded with Subject Matter of Copyright and Neighboring Rights (2005, recently amended in 2009)*, which sets the reproducing, distribution, import and export of disks, stampers and other storage, loaded with subject matter of copyright and neighboring rights. The Act establishes a certificate regime pertaining to the commissioning of production of stampers with recordings and reproducing on optical or other storage loaded with subject matter of copyright and neighboring rights, as well as to the deals in acquiring rights to reproduce and/or distribute, all of these being activities relating to the distribution channels of audiovisual media products and accounting for the modern technological changes in the distribution of audiovisual services.

The *indirect* regulatory framework of Bulgaria's film industry is related to: *The Commerce Act (1991, recently amended in 2009)*, under which the legal entities, engaged in the producing, distribution, exhibition, promotion of film production are registered; *The Protection of Competition Act (1998)*, which is of growing importance in the context of the European single market, moreover, because of the specifics of film products, which are a „cultural exception”, but equally are part of a liberal economic environment. Indirectly regulatory are also the laws related to social security and the payment of those working in the sector.

The national audiovisual industry and the *acquis communautaire*

Being part of the EU, the Bulgarian audiovisual sector is also influenced by a regulatory framework at a supranational level, even though the principle of subsidiarity is the leading one in the field of culture. Through the EU primary legislation (for example, the *Establishing Treaty of the Union*, under which cinema is identified as a “cultural exception” and rules are set for all the sectors) as well as through the main instruments of the EU secondary legislation, such as directives and recommendations, national harmonization at a community level is obtained. In fact, audiovision is a projection of the entire economic infrastructure (which falls also within the scope of liberalization of the exchange of goods and services on the single European market) and the European legislation related to the uniting of the market and the fisc, encouraging of new technologies, but, equally, retaining the cultural specifics of the product, is best developed in this field. The institutional framework at an European level, major to Bulgarian national audiovisual industry as well, contains as follows: *The Audiovisual Media Services directive (2007)*, which came to replace the *TV Without Frontiers*, the *European Convention on Cinematographic Co-production (1992)* ratified in Bulgaria in 2004 and the *European Convention for the Protection of Audiovisual Heritage (2001)*.

II FILM EDUCATION

The university film education in Bulgaria started in 1973, when the Cinema Department of the National Academy for Theatre, transformed later into a Screen Arts Faculty, has been established. Previously, there were few schools that provided basic training in photography and cinema. Currently, there are two state universities and a private one as well as a private college that provide film education in Bulgaria.

THE NATIONAL ACADEMY FOR THEATRE & FILM ARTS, SOFIA

- Film & TV Directing and Animation Department
- Film & TV Cinematography and Photography Department
- Dramaturgy & Film & TV Critical Studies Department

The Screen Arts Faculty's initial degree programs were opened in 1973. The curriculum in the faculty combines professional training with studies in the liberal arts. Students are provided with a variety of creative experiences, from basic to advanced, in both the conceptual and production phases of film, TV and video products, classical and computer animation.

Electives in the liberal arts are required of all students to ensure that they have the background necessary for participation in a profession that influences attitudes, opinions and ways of thinking in every aspect of human experience.

The Screen Arts Faculty is an active member of CILECT and has a representative in its Executive Council. The teaching staff features the most outstanding Bulgarian directors, screenwriters, cinematographers, editors, designers, photographers and critics, having numerous demonstrated their high artistic achievements both in the country and abroad. They not only share their experience but develop their own curricula in the subject areas they teach, providing an individual artistic and methodological approach.

The departments have developed the following programs: *Bachelor Programs* Film and TV Directing, Film and TV Editing, Animation, Film and TV Cinematography, Photography, Film & TV Critical Studies, and Playwriting and Screenwriting; *Master Programs* Screen Arts Management and Film and TV Arts

SOUTH-WEST UNIVERSITY, BLAGOEVGRAD

- Television and TV Arts Department

The Television and TV Arts Department was established in 1991. The offered professional education adheres to world standards and is related to working in close cooperation with unique filmmakers and highly skilled technicians. Taking personal initiative is in great demand and is highly praised with its development being the constant goal of the teaching staff.

The department has developed the following *Bachelor and Master Programs*: Film and TV Editing, Film and TV Directing and Film and TV Cinematography.

NEW BULGARIAN UNIVERSITY, SOFIA

- Cinema, Advertising and Show Business Department

Cinema, Advertising and Show Business Department was established in 1994. It is a community of the teachers in the spheres of Dramaturgy, Directing, Camerawork, Fine Arts, Design, Animation, Digital Imaging Devices, Photography, Advertising, as well as other professionals, related to the creative process of realization and analysis of the film and other visual arts and their application in advertising. The department organizes cinema festivals and exhibitions, where it presents the work of its teachers and students.

The created within the university audiovisual works of art are periodically exhibited at internal, national and international forums. The results of the public activities of the department are widespread within the professional, academic and cultural circles. A number of publications in the central press evidence the warm welcoming of the films, exhibitions and works, created within the department.

The department has developed the following programs: *Bachelor Program* Visual Arts, modules: Cinema and television, Animation cinema, Advertising, Photography, Graphic design; *Master Programs* Film and Television Art, Animation Directing, Graphic and Spatial Design; Cinema Dramaturgy; *Doctoral Program* Graphic design.

SCREEN ARTS COLLEGE, SOFIA

The Screen Arts College was established in 1998. After the completion of its two-year programs in Film, TV, Photography, and Animation, students are to be enrolled as junior students at the Cinema, Advertising and Show Business Department's program of New Bulgarian University, Sofia.

The focus of the Bulgarian National Film Center is on the support of making, distribution, promotion, and exhibition of national film productions. It is fully supported from the government. The principal of the Bulgarian National Film Center is the Ministry of Culture of the Republic of Bulgaria. The following genres are eligible for funding by the Bulgarian National Film Center:

- Development and production of feature films (over 70 minutes), short features (between 15 and 30 minutes), short and feature length documentaries and animation;
- Minority co-productions;
- Local theatrical distribution of Bulgarian movies (including supported minority co-productions);
- Festivals and other cinema events;
- International promotion of Bulgarian films (participation of films and filmmakers at international festivals and other major cinema events).

Only companies registered in compliance with the Bulgarian Trade Law and registered as producers, distributors or exhibitors at the National Film Center – Bulgaria can apply for funding. The state support is allocated to film projects, selected by a National Committee of experts on a competitive basis.

For 2012 the secured amount of the state support for the Bulgarian film industry is 6.2 millions euros. In conformity with the law:

- At least 10 % (0.62 million euros for 2012) of the funding is allotted for local theatrical distribution of Bulgarian movies (including supported minority co-productions);
- Up to 5 % (0.31 million euros for 2012) is allotted for festivals, other film events and international promotion of Bulgarian films;
- Up to 5 % (0.31 million euros for 2012) of the funding is allotted for special film projects on subjects, proposed by the Ministry of Culture;
- At least 80 % (4.96 million euros for 2012) of the funding is allotted for all types of film production (features, documentaries, animation plus minority co-productions). Up to 20 % of this amount (0.98 million euros for 2011) is allotted for minority co-productions.

The legal rate of support for majority Bulgarian productions is as follows:

- At least 30% of the average budget for the previous year of the respective type of film production (feature film, documentary or animation);
- Up to 50 % of the budget of the film project, but for low budget productions the legal amount is up to 80 %. (The definition of low budget film production according to the Bulgarian Film Industry Act: “A film with a budget up to 60

% of the average budget of an European movie for the previous year based on the information provided by the European Audiovisual Observatory".)

Under the signed funding contracts, the producer has the obligation to pay back to the Agency up to 5 % of the received amount. This recoupment is due from the revenue generated after the recoupment of the own investment and other private equity funding.

Every year the Bulgarian National Film Center sets:

- Two application submission deadlines per year for feature films, documentaries and animation;
- Up to four deadlines per year for minority co-productions;
- One deadline per year for co-productions with national TV broadcasters.

With the Bulgarian National Film Center's financial support in 2011, 6 feature films, 5 feature documentaries, 3 medium-length documentaries (up to 60 min), 7 animation shorts, 2 majority and 2 minority feature film co-productions, 2 feature-length documentary minority co-productions and 1 medium-length documentary minority co-production were made. There are completed 5 feature films financed independently.

The Bulgarian National Film Center financed in 2011 the production of 8 upcoming feature films, 1 animation feature, 12 documentaries, 9 animation shorts, 1 short fiction, 1 six-part documentary TV series, 2 minority feature film co-productions, 3 minority documentary feature-length co-productions.

Public funding for Bulgarian film industry (in BGN; 1 BGN = 0.511 EUR)

Film projects by category	2007	2008	2009	2010	2011
Distribution & exhibition	178 542	229 142	312 620	444 050	319 500
Festivals & promotion	244 031	548 737	706 172	818 925	916 720
Film production	6 177 447	10 122 121	10 784 120	7 827 666	8 795 180
National film production	4 232 806	8 752 160	7 593 850	5 555 936	6 693 880
* <i>Feature films</i>	3 149 406	7 631 800	5 022 400	4 427 206	5 579 100
* <i>Documentaries</i>	824 600	907 800	1 741 280	621 500	743 680
* <i>Animation</i>	258 800	212 560	830 170	533 130	371 100
Minority co-productions	640 000	606 300	686 230	1 201 230	629 400
TV co-productions	639 641	272 511	221 480	125 000	70 000
Project development	168 000	148 950	544 560	278 000	217 500
First movies	497 000	342 200	1 738 000	641 600	1 184 400
TOTAL	6 600 020	10 900 000	11 802 912	9 090 641	10 100 000

Average film budgets (in BGN; 1 BGN = 0.511 EUR)

	2005	2006	2007	2008	2009	2010	2011
Feature film	1 260 265	1 540 579	1 773 034	1 970 157	1 692 673	1 822 979	1 885 041
Documentary	115 948	140 998	147 958	151 246	131 230	136 902	144 786
Animation per minute	6435	9374	10 121	10 617	11 605	11 855	12 121

State subsidy for film industry: accounts according to financial report of state budget cash payments for relevant years (in BGN; 1 BGN = 0.511 EUR)

	2001	2002	2003	2004	2005	2006
Subsidy	1 350 369	2 165 852	3 933 146	3 747 232	5 793 341	5 516 994
Total budget	49 812 235	53 771 503	64 936 014	72 855 669	89 989 553	92 337 002
Percentage of subsidy to the total budget	2.71%	4.03%	6.06%	5.14%	6.44%	5.97%

	2007	2008	2009	2010	2011	2012
Subsidy	6 600 000	10 900 000	11 794 400	9 090 000	10 100 000	12 100 000
Total budget	115 053 732	138 480 971	120 895 823	92 292 100	104 292 100	117 903 100
Percentage of subsidy to the total budget	5.74%	7.87%	9.76%	9.85%	9.68%	10.26%

Films produced with support of the National Film Center from 2011 up to April 2012 (in BGN; 1 BGN = 0.511 EUR)

FEATURE					
Title	Director	Production	Details	Support	Completed
AVE	Konstantin Bojanov	CAMERA - Dimitar Gochev, KB FILMS - Konstantin Bojanov; ELEMENTS - Metodi Petrikov, BNT, Geoffroy Grison	Bulgaria, 86 min	594 000	2011
FAIT, LOVE AND WHISKEY	Kristina Nikolova	MAGIC SHOP - Georgi Nikolov, BNT	Bulgaria, 75 min	588 000	2012
I AM YOU	Petar Popzlatev	POST SCRIPTUM 2 - Petar Popzlatev, BNT	Bulgaria, 119 min	1 150 000	2011
INCOGNITA	Mihail Pandoursky	CAMERA - Dimitar Gochev, BNT	Bulgaria, 110 min	1 200 000	2012
KRAPETZ	Kiril Stankov	GALA FILM - Galina Toneva, Kiril Kirilov, SOFILM - Patrick Sandrin, BNT	Bulgaria, 110 min	1 150 000	2012
LOVE.NET	Ilian Djevelekov	MIRAMAR FILM - Matey Konstantinov, Ilian Djevelekov, Georgi Dimitrov, ZOOM MEDIA - Petko Manchev, NOVA TV	Bulgaria, 109 min	1 308 000	2011
MIGRATION OF THE BELTED BONITO	Lyudmil Todorov	STONE FACE - Lyudmil Todorov	Bulgaria, 90 min	1 150 000	2011
SHELTER	Dragomir Sholev	KLAS FILM - Rossitsa Valkanova, BNT, NU BOYANA FILM STUDIOS	Bulgaria, 88 min	810 000	2011
SNEAKERS	Ivan Vladimirov, Valeri Yordanov	GALA FILM - Galina Toneva, Kiril Kirilov, BNT	Bulgaria, 110 min	1 247 700	2011
UNTITLED	Ivan Moskov	KINOCENTER SOFIA STUDIOUS - Evgeni Mihaylov	Bulgaria, 18 min	275 000	2012
ZINKOGRAPH	Emil Christov	PERIPETEIA - Vladislav Todorov, Buriana Zakharieva, BNT	Bulgaria, 107 min	1 150 000	2012

DOCUMENTARY					
Title	Director	Production	Details	Support	Completed
A POET SHOOTS IN HIS HEART	Anna Goranova	GEOPOLY - Pavlina Jeleva, Georgi Cholakov	Bulgaria, 60 min	72 780	2011
CITY OF DREAMS	Svetoslav Draganov	IZOGRAPH - Galina Shtarbeva, BNT	Bulgaria, 52 min	97 000	2011
FILM DESTINY	Nikola Korabov	ARS DIGITAL STUDIO - Ivan Tonev	Bulgaria, 79 min	85 130	2011
GORYANI	Atanas Kiryakov	ART 47 - Ivan Pavlov	Bulgaria, 2x58 min	94 000	2011
STOICHKOV	Borislav Kolev	CAMERA - Dimitar Gochev, BNT	Bulgaria, 98 min	94 000	2012
THE BOY AT THE WINDOW	Vladimir Angelov	VAIK - Valeri Kostov, AUDIOVIDEO ORPHEUS, BNT	Bulgaria, 54 min	104 000	2011
THE MAN AND THE NATION	Svetoslav Ovcharov	OMEGA FILMS - Theodor Vassilev, Annie Yotova, Diko Michov, BNT	Bulgaria, 110 min	97 000	2012
TO THE LEFT OF THE LONDON-CALCUTTA HIGHWAY	Mihail Meltev	TWO AND A HALF - Penko Roussev	Bulgaria, 74 min	104 000	2011

ANIMATION					
Title	Director	Production	Details	Support	Completed
JOMEQ AND RULIETTE	Stoyan Dukov	TRICKSY - Stoyan Dukov	Bulgaria, 2 nd part of 5x2 min	59 000	2011
JOURNEY, TRIP, VOYAGE...	Radostina Neykova, Vladislav Budinov	AUDIOVIDEO ORPHEUS	Bulgaria, 7 min	50 000	2011
KORKY	Anton Trayanov	ZOGRAPHIC FILM - Lachezar Velinov	Bulgaria, 8 min	65 300	2011
LITTLE TRANSFORMATIONS	Boris Klisurski	NAGUAL - Nastimir Tsachev	Bulgaria, 9 min	71 200	2011
MERCI	Gospodin Nedelchev	DIDO FILM - Gospodin Nedelchev	Bulgaria, 8 min	55 100	2011
REW DAY	Svilen Dimitrov	MIRAMAR FILM - Matey Konstantinov, Ilian Djevelevkov, Georgi Dimitrov	Bulgaria, 7 min	28 400	2012
RUDELY	Venelin Velchev	VENELIN ANIMATION - Venelin Velchev	Bulgaria, 5 min	49 000	2011
THE NIGHTMARE	Nikolay Todorov	CLUB NO - Nikolay Todorov	Bulgaria, 9 min	81 300	2011

Co-productions

FEATURE					
Title	Director	Production	Details	Support	Completed
GOODBYE MAMA	Michelle Bonev	ROMANTICA ENT.ITALY, ROMANTICA ENT. BG - Ivan Palichev	Italy/Bulgaria, 112 min	338 000	2011
SPAIN	Anja Salomonovitz	DOR FILM <i>Produktionsgesellschaft</i> - Danny Krausz, Kurt Stocker, CAMERA - Dimitar Gochev	Austria/Bulgaria, 102 min	338 000	2012
TAKE TWO	Nadezhda Koseva	ART FEST - Stefan Kitanov, COIN FILM - Herbert Schwering, BNT	Bulgaria/Germany 27 min	106 000	2011
THE STATE OF SHOK	Andrej Kosak	VERTIGO/EMOTIONFILM - Danijel Hocevar, ART FEST - Stefan Kitanov, FILM HOUSE BAS CELIK - Jelena Mitrovic, PANK FILM - Darko Popov, PRO.BA - Amra Baksic Camo	Slovenia/Bulgaria/Serbia/Macedonia/Bosna and Herzegovina, 93 min	234 700	2012
THE ISLAND	Kamen Kalev	WATERFRONTFILM - Kamen Kalev, Angel Hristanov, ART ETERNAL, CHIMNEY POT, FILM I VAST, MEELIS FILM, BNT	Bulgaria/Sweden, 109 min	910 000	2011
TILT	Victor Chouchkov Jr.	CHOUCHKOV BROTHERS - Borislav Chouchkov, OSTLICHT FILMPRODUKTION - Marcel Lenz, Guido Schwab, BNT	Bulgaria/Germany, 94 min	930 000	2011

DOCUMENTARY					
Title	Director	Production	Details	Support	Completed
ABOUT THE SOUL AND OTHER SMALL THINGS	Kornel Miglus	WFOiPE - Kornel Miglus, BUL DOC - Christo Bakalski, VACANT FILMPRODUKTION - Andrzej Traczykowski	Poland/ Bulgaria/ Germany, 80 min	42 400	2011
RULES OF SINGLE LIFE	Tonislav Hristov	MAKING MOVIES - Kaarle Aho, AGITPROP - Martichka Bozhilova, YLE 1, BNT	Finland/ Bulgaria/ Norway, 79 min	50 130	2011
THE LONG PATH OF THE CROCODILE	Pancho Tsankov	SINIS - Mario Markov	Bulgaria/ Papua-New Guinea/ Australia/ Israel, 51 min	80 000	2011
THE BOY WHO WAS A KING	Andrey Paounov	AGITPROP - Martichka Bozhilova, ZERO ONE FILM	Bulgaria/ Germany, 110 min	150 000	2012

ANIMATION					
Title	Director	Production	Details	Support	Completed
FATHER	Ivan Bogdanov, Moritz Mayerhofer, Asparuh Petrov, Veliko Popovich, Rossitsa Raleva, Dim Yagodin	COMPOTE COLLECTIVE - Maria Stanisheva, Vania Andrijevic, Christian Muller	Bulgaria/ Croatia/ Germany, 17 min	50 130	2012

IV FILM DISTRIBUTION

Ticket sales revenues are soaring in Bulgaria for the sixth year in a row. Though last-years' growth of about 8 percent lagged far behind compared with 2010, when the audiences went up by 34 % and the revenues generated from ticket sales saw a growth by 39 % as compared with those in 2006, the number of spectators has doubled and the box-office receipts have tripled over 2011. Noteworthy is the fact, that we saw a decrease in the average ticket price for the first time in the recent 7 years down to less than 4 euros for the first time over the last three years. This definitely influenced the increase in the number of spectators by 16 percent or twice as much as the increase in the receipts.

This growth is all the more impressive, given that in end-October 2011, the first ever multiplex in Sofia, opened in 2006, closed doors for financial reasons. This loss was made up for by the opening of 4 new multiplexes: two in April and two in November 2010. These are in Sofia, Ruse, Varna and Stara Zagora with a total of 35 halls seating some 5 800. Undoubtedly, these facilitated the increase in the audiences and receipts in 2011. It is worth underlining that the new increase in attendance and revenues of Bulgarian cinema theatres was achieved without the typical of the two years ago film phenomena such as the global No 1 *Avatar* or the national one, *Mission London*, which in 2010 jointly generated 20 % of the total of annual revenues on the Bulgarian market.

Still, a further increase in the audiences attending national productions is definitely decisive for the growth in the number of spectators and revenues in 2011. Following 2010, which saw the success of *Mission London*, in 2011 the number of those attending Bulgarian films, further went up by over 50 %, reaching some 660 000, which is 14 % or so of all the spectators and almost 12 % of the box-office receipts. Indicative of the nature of this trend is the fact that unlike 2010, when just one production apart from *Mission London*, had influenced the market, in 2011 among the eight most successful films of the year, three were national productions: *Love.net* (206 793 admissions, over 700 000 euros in revenue); *Operation Shmenti Capelli* (168 294 admissions, over 570 000 euros in revenue) and *Tilt* (142 779 admissions, over 475 000 euros in revenue). Of the top 25 Bulgarian movies with the highest box-office receipts over the recent decade and a half, 9 were distributed in 2011. Thus Bulgarian productions reached in local cinema theatres the impressive average of 66,000 admissions and 224 000 euros in revenues per film. By comparison, just three years earlier, in 2009, Bulgarian movies across the cinema theatres were attended by 1.6 % of all the admissions and the receipts accounted for less than 1 % of the national box-office revenues. Over the most successful 2008, Bulgarian films attracted about 3 % of the admissions and generated less than 2 % of the box-office revenues.

This surge of Bulgarian audiences' interest in the national film productions sparked a new trend, which started showing as early as the late 2011. For instance, *Operation Shmenti Capelli*, which was made without state aid whatsoever and made it to the third position of the most successful Bulgarian films over the recent two decades, ranked third in terms of attendance. In the early 2012, two other ultralow-budget indie national pictures were released, made also without state funding and being the most attended local movies for the time being: *Rapid Reaction Corps* (over 40 000 admissions within 4 weeks), *The Foreigner* (almost 27 000 admissions within 3 weeks), while by the end of this year at least two more indie pics are expected to be released with a potential to draw over 50 000 admissions each.

A study of the most successful films in 2011 on the Bulgarian market shows that Bulgarian viewers still give the big-budget Hollywood movies preference. Of the top 20, all the movies, apart from the 3 Bulgarian productions, have been financed by big American studios. Of these, 11 are sequels of popular franchise projects and 4 – *Puss in Boots*, *The Smurfs*, *Thor*, *Immortals* – mark the launch of new franchises.

Analysing the shares of individual distributors, what strikes is the significant market concentration of film distribution businesses. The number of film distribution companies, releasing their films across cinema theatres, is going down. Of a total of 13 in 2010, their number fell to 9. As has been the case earlier, in 2011 it is once again Alexandra, Forum Films, A+ Films and Tandem that generate 90 % of the revenues. Yet such a dominant position of these four companies could be explained by the fact that these companies released 90 % of the films across the cinemas. Furthermore, each of the top three leading distribution companies released an increased number of movies on the market; Alexandra, by 15 %; Forum Films, by 25 %, while A+ Films even released twice as much.

Studying the development of Bulgarian film market, we cannot help mentioning the fact that alongside the increase in terms of revenues and audiences, the number of the released films remains relatively low: from 157 in 2005 and the record low 113 in 2010, to 123 in 2011. At the same time the revenues and audiences over 2011 have been spread much more evenly between the individual films. In 2010, the top 10 movies generated almost half of the revenues, while in 2011 the top 10 could not generate even one third of the revenues. Generally, the trend of film distributors slashing the number of the released films to such with big box-office potential persists. Over the year, the pictures, which could be deemed to be arthouse, were *King's Speech* (62nd position in terms of revenues with 28 893 admissions) and *Tree of Life* (76th position with 17 821 admissions).

Obviously, this trend of a drastic reduction and pushing away of the bill of the movies, which fail to offer simple entertainment, is taking its toll mostly on the arthouse films and European productions. Though the audiences are offered such works at a number of film festivals such as *Sofia Film Fest*, *Cinemaniam*, *Love is Folly*, etc., the want of a sustainable arthouse collection portends a further decay of everyday film culture.

Top 20 theatrical releases in Bulgaria 2011 (in BGN; 1 BGN = 0.511 EUR)

Film	Distributor	Studio	Released	Admissions	Box office
PIRATES OF THE CARIBBEAN: ON STRANGER TIDES	FORUM FILM BULGARIA	DIS	20 May 11	220 596	20 069 311
LOVE.NET	ALEXANDRA	BG	01 Apr 11	206 793	1 374 997
OPERATION SHMENTI CAPELLI	GOLD CHAIN	BG	07 Oct 11	168 294	1 128 874
THE SMURFS (DUB)	ALEXANDRA	SONY	19 Aug 11	118 981	1 112 515
TRANSFORMERS 3	FORUM FILM BULGARIA	PAR	01 Jul 11	117 424	1 090 456
FAST AND FURIOUS 5: RIO HEIST	FORUM FILM BULGARIA	UNI	06 May 11	150 677	1 083 240
RIO	ALEXANDRA	FOX	08 Apr 11	102 207	1 001 723
TILT	A + FILMS	BG	11 Feb 11	142 799	933 617
IMMORTALS	TANDEM	IND	11 Nov 11	91 854	876 504
HARRY POTTER 7B	ALEXANDRA	WB	15 Jul 11	83 062	808 037
THOR	FORUM FILM BULGARIA	PAR	29 Apr 11	77 620	788 656
KUNF FU PANDA 2	FORUM FILM BULGARIA	PAR	03 Jun 11	81 039	743 416
CARS 2 (DUB)	FORUM FILM BULGARIA	DIS	24 Jun 11	82 712	720 035
HANGOVER 2	ALEXANDRA	WB	27 May 11	105 604	713 110
PUSS IN BOOTS	FORUM FILM BULGARIA	PAR	23 Dec 11	74 597	706 589
MISSION IMPOSSIBLE: GHOST PROTOCOL	FORUM FILM BULGARIA	PAR	16 Dec 11	81 812	604 247
THE TOURIST	ALEXANDRA	SONY	07 Jan 11	74 109	589 903
IN TIME	ALEXANDRA	FOX	28 Oct 11	80 630	555 141
TWILIGHT – BREAKING DAWN PART I	A + FILMS	IND	18 Nov 11	78 555	549 429
THE MECHANIC	TANDEM	IND	28 Jan 11	76 567	545 642

Theatrical industry trend – 2002–2011 (in BGN; 1 BGN = 0.511 EUR)

Year	Releases	Admissions	Box office	+/- %	Average ticket price
2002	98	2 015 735	8 717 074	+2.7	4.32
2003	117	3 045 451	12 005 343	+37.7	3.94
2004	118	3 120 088	12 592 151	+4.7	4.04
2005	125	2 421 871	11 661 250	-7.4	4.81
2006	157	2 362 149	11 956 716	+2.5	5.06
2007	137	2 398 193	14 020 755	+17.3	5.85
2008	137	2 434 530	17 120 941	+22.1	7.03
2009	143	2 986 611	24 350 153	+42.2	8.15
2010	113	3 993 709	33 879 494	+39.1	8.48
2011	123	4 631 629	36 497 110	+7.7	7.88

2011 Bulgarian theatrical distribution shares (in BGN; 1 BGN = 0.511 EUR)

Distributor	Releases	Admissions	Box office	Releases Share (%)	Admissions share (%)	Box office share (%)	Admission per release	Box office release
Forum Films	32	1 707 503	14 068 791	26.0%	36.9%	38.5%	53 359	439 650
Alexandra	45	1 755 164	13 766 424	36.6%	37.9%	37.7%	39 004	305 921
A+ Films	25	493 196	3 573 215	20.3%	10.6%	9.8 %	19 728	142 929
Tandem	11	381 948	3 069 036	8.9%	8.2%	8.4 %	34 723	279 003
Gold Chain	1	168 294	1 128 874	0.8%	3.6 %	3.1 %	168 294	1 128 874
Pro Films	5	87 743	641 205	4.1%	1.9 %	1.8 %	17 549	128 241
Spotlight	1	17 426	109 346	0.8%	0.4 %	0.3 %	17 426	109 346
Waterfront film	1	16 262	105 517	0.8%	0.4 %	0.3 %	16 262	105 517
Art Fest	2	4083	34 643	1.6%	0.1 %	0.1 %	2042	17 322
Big Bang		10	60	0.0%	0.0 %	0.0 %	-	-

2011 Bulgarian theatrical distribution shares (in BGN; 1 BGN = 0.511 EUR)

Distributor	Releases	Admissions	Box office	Releases share (%)	Admissions share (%)	Box office share (%)	Admission per release	Box office per release
Independent	49	951 289	7 457 369	39.8 %	20.5 %	20.4 %	19 414	152 191
Paramount	12	701 126	5 976 797	9.8 %	15.1 %	16.4 %	58 427	498 066
Disney	7	559 653	4 843 931	5.7 %	12.1 %	13.3 %	79 950	691 990
Warner Bros	17	604 843	4 820 335	13.8 %	13.1 %	13.2 %	35 579	283 549
Local	10	664 685	4 359 709	8.1 %	14.4 %	11.9 %	66 469	435 971
Sony	14	524 688	4 280 392	11.4 %	11.3 %	11.7 %	37 478	305 742
20th Century Fox	8	366 498	2 941 308	6.5 %	7.9 %	8.1 %	45 812	367 663
Universal	6	258 847	1 817 270	4.9 %	5.6 %	5.0 %	43 141	302 878
TOTAL	123	4 631 629	36 497 110					
						Average	37 656	296 724

Top 25 theatrical releases in Bulgaria by admissions – 1998–2012
(in BGN; 1 BGN = 0.511 EUR)

Film	Distributor	Studio	Released	Admissions	Box office
AVATAR	ALEXANDRA	FOX	18 Dec 09	473 118	5 346 851
TITANIC	DUGA	FOX	27 Mar 98	431 219	1 865 269
MISSION LONDON	A+ FILMS	BG	16 Apr 10	375 754	2 624 689
TROY	ALEXANDRA	WB	14 May 04	289 708	1 172 371
ICE AGE 3 (DUB)	ALEXANDRA	FOX	03 Jul 09	237 591	2 551 166
THE LORD OF THE RINGS: THE RETURN OF THE KING	ALEXANDRA	IND	09 Jan 04	223 622	951 151

STAR WARS: EPISODE I	DUGA	FOX	17 Sept 99	222 208	913 352
PIRATES OF THE CARIBBEAN: ON STRANGER TIDES	FORUM FILM BULGARIA	DIS	20 May 11	220 596	2 069 311
ARMAGEDDON	SUNNY	BVI	28 Aug 98	215 886	842 807
MATRIX RELOADED	ALEXANDRA	WB	23 May 03	212 909	836 652
LOVE.NET	ALEXANDRA	BG	01 Apr 11	206 793	1 374 997
THE MATRIX	ALEXANDRA	WB	03 Sept 99	197 963	830 467
GLADIATOR	SUNNY	BVI	04 Aug 00	182 402	727 263
PRINCE OF PERSIA	FORUM FILM BULGARIA	BVI	21 May 10	172 171	1 336 419
OPERATION SHMENTI CAPELLI	GOLD CHAIN	BG	07 Oct 11	179 557	1 197 090
2012	ALEXANDRA	SONY	13 Nov 09	160 547	1 180 339
FAST AND FURIOUS 5: RIO HEIST	FORUM FILM BULGARIA	UNI	06 May 11	150 677	1 083 240
STAR WARS: EPISODE 3	ALEXANDRA	FOX	19 May 05	150 298	777 152
PIRATES OF THE CARIBBEAN: DEAD MAN'S CHEST	SUNNY	BVI	12 July 06	146 326	748 916
DA VINCI CODE	ALEXANDRA		19 May 06	144 253	759 061
TILT	A+ FILMS	BG	11 Feb 11	142 799	933 617
PUSS IN BOOTS	FORUM FILM BULGARIA	PAR	23 Dec 11	140 219	1 313 522
SHERLOCK HOLMES 2	ALEXANDRA	WB	23 Dec 11	135 782	967 797
INDIANA JONES AND THE KINGDOM OF THE CRYSTAL SKULL	PROOPTIKI	UIP	23 May 08	133 237	924 810
PIRATES OF THE CARIBBEAN: AT THE WORLD'S END	SUNNY	BVI	24 May 07	132 462	771 503

Top 25 Bulgarian releases of local films by box office – 1998–2012
(in BGN; 1 BGN = 0.511 EUR)

Film	Distributor	Released	Admissions	Box office
MISSION LONDON	A+ FILMS	16 Apr 10	376 809	2 626 156
LOVE.NET	ALEXANDRA	01 Apr 11	206 793	1 374 997
OPERATION SHMENTI CAPELLI	GOLD CHAIN	07 Oct 11	179 557	1 197 090
TILT	A+ FILMS	11 Feb 11	142 799	933 617
FOOTSTEPS IN THE SAND	PRO FILMS	28 Jan 11	54 674	342 003
RAPID REACTION CORPS	PRO FILMS	02 Mar 12	40 487	287 772
SNEAKERS	A+ FILMS	28 Oct 11	41 380	263 989
DZIFT	ALEXANDRA	28 Sept 08	35 166	255 896
THE FOREIGNER	A+ FILMS	09 Mar 12	26 677	189 984
THE WORLD IS BIG AND SALVATION LURKS AROUND THE CORNER	ALEXANDRA / ART FEST	10 Oct 08	36 400	181 763
EASTERN PLAYS	MVM INTERNATIONAL	16 Oct 09	19 567	113 298
LORA FROM MORNING TILL EVENING	SPOTLIGHT	03 Jun 11	17 426	109 346
HDSP	A+ FILMS	17 Sep 10	16 609	106 282
THE ISLAND	WATERFRONT FILM	14 Oct 11	16 262	105 517
FORECAST	ALEXANDRA	17 Apr 09	12 425	88 722
FLY WITH ROSSINANT	ALEXANDRA	10 Nov 07	13 668	84 983
MILA FROM MARS	ALEXANDRA	28 Jan 05	20 563	83 295
SEAMSTRESSES	BDK	12 Oct 07	9 506	52 645
TIME FOR WOMEN	NIKE I	23 Mar 07	13 574	38 781
L'S REVOLT	PRO FILMS	22 Sept 06	9 544	36 616
GOODBYE MAMA	A+ FILMS	06 May 11	5 587	36 575
SHELTER	A+ FILMS	10 June 11	5 926	35 315
STOLEN EYES	KANINA FILM	09 Sept 05	10 005	35 193
SPANISH FLY	DUGA ART	30 Jan 98	11 751	31 898
AVE	A+ FILMS	09 Mar 12	4201	29 992

Over the last decade, the number of cinema theatres in Bulgaria has significantly decreased. In 2002 there were 202 screens with 71 373 seats, but in 2008 the number of screens went down to 95 with 21 425 seats (including 6 Multiplexes with 63 screens and 12 356 seats) or the cinema theatres totalled 32. In the coming couple of years 5 new Multiplexes (with 46 screens and 7551 seats) are slated to open doors, but the number of cinema theatres in Bulgaria in the early 2012, excluding these in the Multiplexes, reached a historical low of 18 cinemas with 7525 seats, situated in 13 towns.

By the early 2000 most of the cinema theatres in Bulgaria (90%) were state-run. With the privatisation of Sofia Film, Bulgaria's biggest cinema chain, most of the state-run cinema theatres were acquired by private companies or owners. Among the reasons for the slump in the number of cinema theatres in 2004 (56 screens and 19,076 seats) is the closure of the Sofia Film cinema chain, being declared insolvent in the same year, and the snowballing closure of cinema theatres in a number of smaller towns for economic reasons.

Nevertheless, in the second half of the decade, starting from 2005 (104 screens and 21 350 seats) a relative increase in the number of cinema theatres was witnessed. It is not due to the fact that new cinema theatres have opened doors, rather because the closed old single-screen cinemas have been replaced by 6, 8 or more screens modern multiplexes. It was in 2005, when most of the small cinema theatres closed for good, that, in Sofia, the second Multiplex of the Alexandra Group, the Arena Cinemas chain opened doors with 15 screens each (a total 5992 seats). Over the following years, the Arena Cinemas chain expanded with two other multiplexes: in the Mall of Varna with 8 screens (1177 seats), in the Park Mall of Stara Zagora with 6 screens (946 seats).

Though almost no public investments have been made in the opening of new cinemas and the number of cinemas has decreased by half, in the recent years a growing number of new multiplexes with more than 8 screens opened doors as well as renovated cinemas with several screens. In 2006, 6-screen Cineplex Theatre opened doors in the Sofia City Centre shopping centre (1367 seats) and the first IMAX screen (404 seats) was opened in the Mall of Sofia as part of Cinema City with still other 12 screens (2470 seats). Over the next years, the number of cinemas in Bulgaria has started increasing gradually. The Arena Cinemas chain opened a new cinema theatre in Veliko Tarnovo with 3 screens and another one Arena Cinema in Central Mall of Plevan with

1 screen. A few new cinemas started functioning in the country, in cities without any cinemas for years now: Botevgrad, Mezdra, Silistra, Targovishte. In 2009, with the opening of a second Cinema City in the Mall of Plovdiv with 11 screens (1686 seats) yet another cinema theatres chain, Cinema City, established its presence within the territory of Bulgaria.

The two companies seem to start competing with each other for investing in and opening of new multiplexes. In April 2010, two new multiplexes of the Arena Cinemas chain opened doors: in The Mall of Sofia with 10 screens (1791 seats) and in Grand Mall of Varna with 8 screens (897 seats). In the end of 2010, two more multiplexes, this time of Cinema City chain, welcomed their first visitors: Cinema City in Galeria Mall of Stara Zagora with 7 screens (1306 seats) and Cinema City in Mall of Ruse with 10 screens (1871 seats). Interestingly, it was in the city of Ruse, where a century ago the first cinema theatre in Bulgaria was built, Modern Theatre.

Unfortunately, in 2011 negative trends were witnessed in the wake of the economic situation across Europe, which had an impact on this country as well. Over the recent couple of years, new or renovated cinemas opened doors that could not make it on the film market. In a number of cities, the resources needed to maintain a cinema theatre have slumped drastically with the shortage of funds, including for advertising) resulting in a decreasing number of viewers and revenues. In late 2010 renovated cinemas opened doors in Silistra, Ruse and Biala (a total of 789 seats), which, however, closed up in just a few months. The cinema theatre in Shumen (750 seats) also shut and the city was left without any cinema theatre at all. In April 2011, a small cinema in Plovdiv (67 seats) also closed up. The 6-screen Cineplex in the Sofia City Centre shopping centre (1367 seats) closed doors in November 2011 following 5 years of functioning. The closure was allegedly due to a planned overhaul and re-equipment, but no repair works have been undertaken for 6 months now. Subsequently, the halls of the Cineplex are not expected to welcome visitors any longer. It will be the first multiplex ever, which has closed for want of funds.

In this way, the cinema theatres in Bulgaria in the beginning of 2012 reached a total of 28 cinemas with 131 screens (26 065 seats).

Now there are only 11 single-screen cinemas left. Of them, only a few cinema theatres in small towns do not yet have the necessary scanners for the analogue track (Cyan Dye Track), which has, since 2005, been used in 90 % of the released films. These cinema theatres are supposed to close up for want of funds for re-equipment. All the more so, as in 2012-13 the digital cinema age adverts and film reels will become history; film distribution will also see a new era. On the other hand, European programmes supporting small cinemas

for exhibition are in place. There is an option these small cinemas to absorb the funds slated for digitalisation to establish places for next-generation cinema exhibition. In 2011, at Euro Cinema in Sofia, a Digital Screen (17 seats) opened doors. The number of Digital screens in Bulgaria is on the rise, reaching 74 in the early 2012.

In 2011, Bulgarian Multiplexes were visited by 4 039 641 viewers, which is 87 % of all the viewers, who paid admission fees 31 557 974 BGN (= 16 135 335 euros). This amount represents 86 % of the GBO in all cinemas. In 2011, the viewers in cinema theatres in Bulgaria totalled 4 631 629 with 36 497 110 BGN (18 660 676 euros) in revenues.

There are only 4 Bulgarian cinemas that are members of the Europa Cinemas network, three in Sofia (Cinema Lumiere, Cinema House and Euro Cinema) and one in Varna (Hall Europe, located in the Festival Complex). Unfortunately, the 6-screen Cineplex in Sofia (1367 seats), which closed up in late 2011, was part of the Europa Cinemas chain. The total seats of Europa Cinemas network in Bulgaria is 950.

Cinemas – 2012

Cinemas with	Number of cinemas	Number of screens	Seats
1 screen	11	11	1272
2 screens	5	10	5567
3-5 screens	2	7	686
6-7 screens	2	13	2252
8-11 screens	5	47	7422
12-15 screens	3	43	8866
	28	131	26 065

Multiplexes – 2008–2012

Year	Number of multiplexes	Number of screens	Seats
2008	6	63	12 356
2009	7	74	14 042
2010	9	92	16 730
2011	11	109	19 907
2012	10	103	18 540

Screens – 2002–2012

Year	Number of screens	Number of digital screens	Seats
2002	202	0	71 373
2003	194	0	74 393
2004	56	0	19 076
2005	104	2	21 350
2006	112	2	24 923
2007	114	2	25 301
2008	95	12	21 425
2009	104	22	22 657
2010	122	40	25 345
2011	141	52	29 021
2012	131	74	26 065

Cinemas, excluding multiplexes – 2012

Town	Cinemas	Screens	Seats
Sofia	4	6	4679
Plovdiv	2	6	526
Burgas	2	3	305
Veliko Tarnovo	1	3	309
Varna	1	2	980
Blagoevgrad	1	1	234
Pleven	1	1	133
Yambol	1	1	78
Mezdra	1	1	70
Botevgrad	1	1	61
Targovishte	1	1	52
Dimitrovgrad	1	1	49
Sevlievo	1	1	49
13	18	28	7525

Multiplexes with 6 and more screens – 2012

Town	Site	Screens	Seats	Opening date
Sofia	Cinema Arena Zapad	15	3020	4 Apr 03
Sofia	Cinema Arena Mladost	15	2972	19 May 05
Sofia	Cinema City, Mall of Sofia	13	2874	13 Jul 06
Plovdiv	Cinema City, Mall of Plovdiv	11	1686	19 Mar 09
Sofia	Cinema Arena, The Mall	10	1791	21 Apr 10
Ruse	Cinema City, Mall of Ruse	10	1871	28 Dec 10
Varna	Cinema Arena, Mall of Varna	8	1177	12 Jun 08
Varna	Cinema Arena, Grand Mall	8	897	15 Apr 10
Stara Zagora	Cinema City, Mall Galeria	7	1306	18 Nov 10
Stara Zagora	Cinema Arena, Park Mall	6	946	01 Nov 08
5	10	103	18 540	

5 most successful cinemas according to attendance in 2012

Town	Multiplex	Screens	Admissions
Sofia	Cinema City, Mall of Sofia	13 screens	759 969
Sofia	Cinema Arena, The Mall	10 screens	584 128
Sofia	Cinema Arena Zapad	15 screens	562 259
Plovdiv	Cinema City, Mall of Plovdiv	11 screens	465 281
Sofia	Cinema Arena Mladost	15 screens	448 623
		ADM	2 820 260
		GBO	23 070 757

Europa Cinemas network – 2012

Town	Site	Screens	Seats
Sofia	Cinema Lumiere	1	352
Sofia	Cinema House	1	284
Varna	Hall Europe, Festival Complex	1	230
Sofia	Euro Cinema	1	84
2	4	4	950

VI FESTIVALS

Several national and international festivals are held on a yearly basis.

SOFIA INTERNATIONAL FILM FESTIVAL

Sofia International Film Festival is the leading film event in Bulgaria and one of the most high-profile festivals in Central East Europe. It is accredited by FIAPF as competitive festival for first and second films. The SIFF familiarizes the local audiences with the best recent works of the world cinema and presents new Bulgarian and regional films to international audiences.

Since 2004 significant part of the festival is the Sofia Meetings co-production market (pitching for feature film projects and showcasing Bulgarian and regional films).

Venue place and date: *Sofia, March*; Submission deadline: *mid November*

FILM PALACE FEST

Film Palace Fest is the biggest and the most high-profile event, presenting max. 45-minute films of all genres in Bulgaria. It is organized in collaboration with and the support of the Ministry of Culture, the Bulgarian National Film Center, the Municipality of Balchik and the Palace in Balchik.

This is the first single event featuring short films in Bulgaria, which is financed under the EU MEDIA program and under the EC Youth in Action program.

Venue place and date: *Balchik/Varna, late June – early July*; Submission deadline: *March*

FILMINI

FILMINI International Short Film Festival is a competitive festival of short films. It aims to contribute to the promotion and production of arthouse short films, and to develop a spirit of friendship and cooperation among filmmakers from all over the world.

The festival program includes several competitions of short films as well as non-competitive film programs, retrospections.

Venue place and date: *Sofia, October*; Submission deadline: *late July*

LOVE IS FOLLY INTERNATIONAL FILM FESTIVAL

Love Is folly is a competitive international film festival. It is held on a yearly basis in the coastal city of Varna. In terms of its genre, the Festival is oriented towards dramas and comedies, melodramas and romances.

Venue place and date: *Varna, late August – early September*; Submission deadline: *early June*

THE CINEMANIA WORLD FILM PANORAMA

The Cinemania started in 1987 as a World Film Panorama. The main program presents leading European cinemas. Part of the program includes the most interesting events in the field of the independent American cinema. Significant film titles of national cinematographies that are less popular in Bulgaria prevail. The Cinemania presents also retrospections (of Yasudjiro Ozu, Milos Forman, Miroslav Ondricek, Krzysztof Kieslowski, Jacques Demy, etc.), portraits of celebrities of the present and the past (Sven Nykvist, Robert Altman, Carlos Saura, Mormarev Bros., prominent Bulgarian scriptwriters). On the sidelines of the fest, other events are held, such as premieres of books by popular filmmakers, round-table-talks and seminars.

The main purpose of the fest is rendered obvious in the very phrasing of the event: Cinemania International Film Panorama. The accent is put on the selection and geography of the offered films. The idea is the Bulgarian spectators to get familiarised in a fortnight with the most essential of the films that have been made in the last 2 or 3 years, winners at European and world film festivals.

Venue place and date: *Sofia, November – December*; Submission deadline: *non competitive*

GOLDEN ROSE

The *Golden Rose* Festival of Bulgarian Feature Films is held at the Festival and Congress Centre in the coastal city of Varna. The Festival is a competitive one for Bulgarian fiction films. The event is organized by the *Bulgarian National Film Center* and the Bulgarian National Television with the support of the Bulgarian Ministry of Culture and the Municipality of Varna.

Venue place and date: *Varna, October*; Submission deadline: *mid-August*

GOLDEN RHYTON

The *Golden Rhyton* is a national film festival, hosted by the Novotel-Plovdiv in the city of Plovdiv, in December. It is a competitive documentary and animation film festival, organised by the *Bulgarian National Film Center*, the Bulgarian National Television with the support of the Bulgarian Ministry of Culture and the Municipality of Plovdiv.

Venue place and date: *Plovdiv, December*; Submission deadline: *mid-October*

VII AWARD-WINNING BULGARIAN FILMS ABROAD

2011

APOSTOL KARAMITEV (documentary), directed by Momchil Karamitev, 2009

- Los Angeles Independent Film Festival; *Award*: Honourable Mention

AVE (feature), directed by Konstantin Bojanov, 2011

- Sarajevo Film Festival; *Awards*: Special Jury Prize, CINEUROPA Internet
- Warsaw International Film Festival; *Award*: FIPRESCI (for Best East-European Debut)
- Film Fest Hamburg; *Award*: Die Elfe

EUROPOLIS: THE TOWN OF THE DELTA (documentary), directed by Kostadin Bonev, 2009

- Los Angeles Independent Film Festival; *Award*: Honourable Mention

FOOTSTEPS IN THE SAND (feature), directed by Ivailo Hrsitov, 2010

- Sofia International Film Fest; *Award*: Best Balkan Film

I DREAM OF MUMMERS (documentary), directed by Adela Peeva, 2011

- Royal Anthropological Institute International Festival of Ethnographic Film; *Award*: Audience Film Prize
- International Festival of Ethnological Film, Belgrade, *Award*: Best Film on Intangible Heritage

SHELTER (feature), directed by Dragomir Sholev, 2010

- Sofia International Film Fest; *Awards*: Grand Prix, Kodak Award for Best Bulgarian Feature Film
- Cyprus Film Days International Film Festival; *Award*: Special mention
- South East European Film Festival, Los Angeles; *Award*: Best First Feature Film Award
- Festival of European Cinema in Essonne, France; *Awards*: Grand Prix for Best European Film; Best Actor; Best Film Prix Etudiants/Credit Agricole
- Bratislava International Film Festival; *Award*: Best Director.

SNEAKERS (feature), directed by Valeri Jordanov and Ivan Vladimirov, 2011

- Moscow International Film Festival; *Awards*: Special Mention, Prize of the Russian Film Clubs Federation

THE RULES OF SINGLE LIFE (documentary), directed by Tonislav Hristov, 2011

- Sofia International Film Fest; *Award*: Audience Award

THE SHIPS ARE FULL (documentary), directed by Kostadin Bonev, 2006

- Los Angeles Independent Film Festival; *Award*: Honourable Mention

TILT (feature), directed by Victor Chuchkov Jr., 2010

- Cinedays film-festival of European film, Macedonia; *Awards*: Best Balkan Film; Best Cinematography
- Raindance Film Festival, London 2011; *Award*: Best Debut Award
- Woodstock Film Festival, New York; *Award*: Lyon Award for Best Editing of a Narrative Film

MY TIRED FATHER (short feature), directed by Maya Vitkova, 2011

- Cabbagetown Short Film & Video Festival, Toronto; *Award*: Grand Prize

PARADISE HOTEL (documentary), directed by Sofia Tzavella, 2010

- ZagrebDox; *Award*: Special Mention
- Thessalonica Documentary Festival; *Awards*: the FIPRESCI Award, ERT3 Award
- PriMed International Festival of Mediterranean Documentary and Current Affairs Films, Marseilles; *Award*: Premio Speciale della Giuria
- MIDA Shanghai Television Festival; *Award*: Golden Magnolia for Best Social Documentary

STANKA GOES HOME (short feature), directed by Maya Vitkova, 2010

- Naoussa International Film Festival, Greece; *Awards*: Second Best Short Film, Best Cinematography
- Oblo Film Festival, Lausanne; *Award*: Special Mention by the Jury

TAKE TWO (short feature), directed by Nadejda Koseva, 2011

- Sarajevo Film Festival; *Award*: Honorable Mention

THE BED (short feature), directed by Petra Katrandjieva

- Lions International Short Film Contest, Istanbul; *Award*: Second Film in the Best Short Film category

THE GIFT (short feature), directed by Sava Komitski, 2011

- Lions International Short Film Contest, Istanbul; *Award*: Special Mention

THE PILLOW (short feature), directed by Ana Kitanova, 2010

- Lions International Short Film Contest, Istanbul; *Award*: Best Director

TRAINS (short feature), directed by Pavel Vesnakov, 2011

- Sofia International Film Fest; *Award*: JAMESON Short Film Award for Best Bulgarian Short Film

2012

AVE (feature), directed by Konstantin Bojanov, 2011

- Sofia International Film Fest; *Awards*: Best Director, Kodak Award for Best Bulgarian Feature Film, Best Balkan Film, Film Critics for Best Balkan Film
- Porto International Film Festival; *Awards*: Director's week: Best Film, Best Screenplay

FAITH, LOVE AND WHISKY (feature), directed by Kristina Nikolova, 2012

- Slamdance Film Festival, USA; *Award*: Kodak Vision for Cinematography

MISSION LONDON (feature), directed by Dimiter Mitovski, 2010

- Motovun Film Festival, Croatia; *Award*: Unbridable Award

TILT (feature), directed by Victor Chuchkov Jr., 2010

- California Independent Film Festival; *Awards*: Best Director, nominations for Best Film, Best Director, Best Actress, Best Actor, Best Cinematography, Best Music

VOICE OVER (feature), directed by Svetoslav Ovcharov, 2010

- Los Angeles Independent Film Festival; *Awards*: Award of Excellence, Best Supporting Actor, Best Production Design, Best Costume Design

BULGARIAN NATIONAL FILM CENTER

The Bulgarian National Film Center is an Executive Agency of the Bulgarian Ministry of Culture that administrates the implementation of the Film Industry Act (FIA). The main functions of the Agency are to finance film production, distribution and exhibition of films, to support the promotion of Bulgarian films in the country and abroad, to keep the register under FIA, to stimulate the development of the film culture.

The Bulgarian National Film Center administers producer's rights of Bulgarian films, when granted such rights under an act or a contract. It represents Bulgaria at the Board of management of Eurimages Fund of the Council of Europe; it is the coordinator for Bulgaria of the European Audiovisual Observatory and of the MEDIA Program of the EU.

For the creation, the distribution and the preservation of Bulgarian films the Bulgarian National Film Center collaborates closely with the Bulgarian National Television, the Bulgarian National Film Archives, the Union of Bulgarian Filmmakers.

The Bulgarian National Film Center is the organizer of the Golden Rose Festival of Bulgarian Feature Films (Varna), and the Golden Rhyton Documentary and Animation Film Festival (Plovdiv).

The most popular recently made films:

- TILT, directed by Viktor Chouchkov Jr., 2011 (the Bulgarian entry for Foreign language Oscar`11)
- LOVE.NET, directed by Ilian Djevelev, 2011
- MISSION LONDON, directed by Dimitar Mitovski, 2010
- EASTERN PLAYS, directed by Kamen Kalev, 2009 (the Bulgarian entry for Foreign language Oscar`10)
- THE WORLD IS BIG AND SALVATION LURKS AROUND THE CORNER, directed by Stephan Komandarev, 2008 (the Bulgarian entry for Foreign language Oscar`09)

The Bulgarian National Film Centre is an European Film Promotion member since 2005.

NATIONAL FILM ARCHIVE

The Bulgarian National Film Archive is a Member of the International Federation of Film Archives (FIAF) since 1959. It holds the national film archive, which consists of about 15 000 titles with more than 40 000 copies. There are 9528 Bulgarian films (including features, documentaries and animations) and 4348 foreign films from 54 countries. The absolute priority of the Bulgarian Film Archive is to preserve “the moving pictures” for the posterity.

UNION OF BULGARIAN FILM MAKERS

The Union of Bulgarian Filmmakers is a creative professional organization with its own contribution to the development of film art and audiovision in Bulgaria as an active party in the process of devising of all concepts, legislation, models and decisions, which correspond to the problems of audiovisual culture.

The Union represents its structures and members in international organizations: FERA, FIPRESCI, ASIFA, CIFEJ, UNI-MEI (EURO-ME).

With its activities the Union of Bulgarian Filmmakers contributes to the development and protection of Bulgarian cinema; to the development of the film theory and film history; to the aesthetic education of the cinemagoers; to applying of high art criteria.

FILMAUTHOR

Filmautor, established in 1993, is the Bulgarian society for collective management of copyrights and the neighboring rights in the audiovisual field. It is a member of CISAC.

Its members are Bulgarian directors, scriptwriters and cameramen that are copyright holders under the Bulgarian Copyright and Neighboring Rights Act. Members are also Bulgarian producers of the audiovisual works.

Filmautor has reciprocal representation agreements with 25 sister societies from across the world.

NATIONAL CULTURE FUND

The National Culture Fund was established within the framework of the Ministry of Culture and started functioning in November, 2000. The National Culture Fund supports the development of Bulgarian culture through subsidizing different arts, cultural activities and authors. Its main goal is to support the development of culture by raising, managing and allotting funds for the purpose of

pursuing the national policy in the field of culture as set forth in the Program of the Government of the Republic of Bulgaria for the respective period and the Law on Protection and Development of Culture.

The priorities in the NCF activity are also in compliance with the criteria set forth in Chapter “Culture & Audio-visual Policy” of the EU Accession Treaty of Bulgaria.

INSTITUTE FOR CULTURE OF THE MINISTRY OF FOREIGN AFFAIRS

The institute supports and works towards priority delivery of national and international cultural projects and programs. It offers assistance to Bulgarian diplomatic missions abroad in their effort to expand the bilateral and multilateral cultural relations and cooperation. It preserves, makes acquisitions and promotes the artwork collection of the Ministry of Foreign Affairs of the Republic of Bulgaria. Along with the Diplomatic Institute it delivers training in the area of cultural diplomacy for young diplomats.

OBSERVATORY OF CULTURAL ECONOMICS

The Observatory of Cultural Economics, Sofia, was established in the early 2008 as an open research platform. Its major mission is to provide sustainable support for arts and culture through devising and disseminating economic and financial analyses and prognoses, facilitating the development of the cultural sector.

The goal of the Observatory of Cultural Economics is to develop and encourage the theory and practice of economic analyses in the cultural sector; to act as a mediator between the arts, society, politicians, researchers, i.e. to foster the efficient inclusion of the cultural institutions in the processes of building cultural policies and strategies. For this purpose the Observatory initiates discussions, develops cultural projects, encourages the establishing of networks and communities in the field of the economics of culture.

MEDIA PROGRAM

Over the past 16 years, MEDIA, the EU's support program for the European audiovisual industry, has supported the development and distribution of thousands of films as well as training activities, festivals and promotion projects throughout the continent. From 2001-2006, more than half a billion euros were injected into 8000 projects from over 30 countries.

The new **MEDIA 2007** program (2007-2013) is the fourth multi-annual program since 1991 (previous programs) and has a budget of € 755 million. It simplifies the program's administration but certainly not its objectives:

- to strive for a stronger European audiovisual sector, reflecting and respecting Europe's cultural identity and heritage;
- to increase the circulation of European audiovisual works inside and outside the European Union;
- to strengthen the competitiveness of the European audiovisual sector by facilitating access to financing and promoting use of digital technologies.

The MEDIA program is implemented via annual work program. MEDIA 2007 is divided into five action lines:

- training of professionals;
- development of production projects and companies;
- distribution of cinematographic works and audiovisual programs;
- promotion of cinematographic works and audiovisual programs, including the support for film festivals;
- horizontal actions/pilot projects.

Independent production and distribution companies can apply for development or distribution funding in the form of grants and interest free loans. Financial assistance is available for training providers and organisers of markets and festivals. Practitioners in the audiovisual industry such as producers of film, television, animation, new media companies, distribution and sales companies and also 'enabling' organisations such as training bodies or film schools, promotional events or festival organisers.

The European Union adopted a new **MEDIA Mundus** programme, a broad international cooperation programme for the audiovisual industry to strengthen cultural and commercial relations between Europe's film industry and film-makers of third countries. The EU will provide €15 million of funding from

2011–2013 for projects submitted by audiovisual professionals from Europe and from third countries.

The official site of the MEDIA program is available at:
www.ec.europa.eu/media

MEDIA and Bulgaria

Bulgaria is part of MEDIA family since 2002. The MEDIA's information desk in Bulgaria is opened since 2003.

Some of the most successful films, supported by MEDIA, are:

- THE BOY WHO WAS A KING (feature), produced by AGITPROP, directed by Andrey Paounov
- SNEAKERS (feature), produced by GALA FILM, directed by Valeri Iordanov and Ivan Vladimirov
- TILT (feature), produced by CHOUCHKOV BROTHERS, directed by Viktor Chouchkov Jr.
- DIVORCE ALBANIAN STYLE (documentary), produced by ADELA MEDIA, directed by Adela Peeva
- A FAREWELL TO HEMINGWAY (feature), produced by PROFILM, directed by Svetoslav Ovcharov
- THE MOSQUITO PROBLEM AND OTHER STORIES (documentary), produced by AGITPROP, directed by Andrey Paounov
- CORRIDOR N 8 (documentary), produced by AGITPROP, directed by Boris Despodov

MEDIA support for Bulgarian projects – 2007–2011

(in EUR; 1 EUR = 1.96 BGN)

Activities	2007	2008	2009	2010	2011
Training	80 000	90 000	90 000	90 000	---
Development	---	---	132 802	182 751	143 025
Distribution	276 363	247 923	327 423	282 689	262 485
Festivals	35 000	50 000	57 000	84 663	65 000
Promotion	55 000	75 000	75 000	75 000	75 000
MEDIA International	n/a	n/a	100 000	n/a	n/a
MEDIA Mundus	n/a	n/a	100 000	---	---
TOTAL	446 363	462 923	782 225	715 703	545 510

Source: MEDIA Desk – Bulgaria, 2012

MEDIA's development support for 2011 is as follows

(in EUR; 1 EUR = 1.96 BGN)

Company name	Project title	Category	MEDIA support (in Euro)	Call (deadline)
ARTHOUSE BLOCKUSTERS	MEXICAN EXPRESS	animation	25 000	25/2010 (11.04.2011)
ARS	THE BIG MANIPULATION	documentary	23 950	25/2010 (11.04.2011)
CINEASTE MADUIT PRODUCTION	LIFE IS WONDERFUL, ISN'T IT? – 10 YEARS LATER	documentary	19 463	25/2010 (11.04.2011)
FRONT FILM	THE NOTEBOOK	feature	25 000	25/2010 (29.11.2010)
KABOAL	GETTING TO SOFIA	feature	25 000	25/2010 (29.11.2010)
ARGO FILM	THE JUDJMENT	feature	24 612	25/2010 (29.11.2010)
TOTAL			143 025	

Source: MEDIA Desk – Bulgaria, 2012

EURIMAGES

Eurimages is a cultural support fund established in 1989 within the framework of the Council of Europe. In 2011 Georgia has become its 36th member state.

Eurimages promotes the European audiovisual industry by providing financial support to European cinematographic works. In doing so, it encourages cooperation between professionals established in different European countries.

The Board of Management defines the policy of the Fund and takes the decisions on support. It is composed of representatives of all member states and meets four times a year. Eurimages has four support schemes: co-production, theatrical distribution, exhibition, theatre digitisation.

A main condition of obtaining Eurimages support is the project to be an international co-production between at least two member states. Every co-producer has to have at least 50% of the financing in place.

The official site of Eurimages is available at: www.coe.int/eurimages

Eurimages and Bulgaria

Bulgaria has been a member of Eurimages since 1993. The state has signed the European Convention of Cinematographic Co-production in 2005 and has bilateral co-production agreements with France, Italy, Canada, Russia, and Israel.

Some of the most successful co-productions, supported by Eurimages, are:

- TILT (feature), co-produced by Bulgaria and Germany, directed by Victor Chuchkov; 143 000 admissions; Bulgaria's Oscar nomination 2010
- THE STATE OF SHOCK (feature), co-produced by Slovenia, Serbia and Bulgaria, directed by Andrej Kosak
- THE ISLAND (feature), co-produced by Bulgaria and Sweden, directed by Kamen Kalem; selected for Cannes IFF Directors' Fortnight (2011)
- THE POLISH PLUMBER (documentary), co-produced by Bulgaria and Ireland, director Boris Despodov
- THE FILE PETROV (feature), co-produced by Bulgaria, Germany and France, director Gueorgui Balabanov

TV broadcasters, programmes, zoning, audiences ¹

• Analogue terrestrial broadcasting

In 2011, there were 3 providers of audiovisual media services, licensed for four national TV programmes, meant for networks of analogue terrestrial broadcasting:

- BNT 1 of the Bulgarian National Television (BNT);
- “B”TV and bTV Action, (the latter has not an analogue version) of bTV Media Group EAD;
- Nova TV of the Nova Broadcasting Group AD.

The Bulgarian National Television (BNT) being a national public TV provider holds also licenses to create its five regional programmes BNT2. BNT2 was launched in October 2011 and since December has been licensed to broadcast by means of satellite or cable. In the early 2012 the license for Greater Sofia was suspended at the request of the BNT.

• Digital terrestrial broadcasting

Twenty providers hold individual licenses to create 33 TV programmes, meant for national digital terrestrial broadcasting. One provider is licensed to create a regional programme for digital terrestrial broadcasting: NRG Vision in the district of Targovisthe.

• Cable and satellite broadcasting

121 providers of audiovisual media services have been registered to launch 149 programmes for broadcasting by means of cable electronic communication network and satellite.

There are over 600 cable network operators but the sector is beginning to consolidate. In June 2010, the private equity company EQT V took over both of the major operators Cabletel and Eurocom establishing a new cable service called Blizoo. In September 2010 Telekom Austria (via Mobiltel) bought into the Bulgarian market (acquiring Megalan and Spectrum). Bulgaria now has three satellite platforms: Bulsatcom; Satellite BG (a merger of the former Total TV package and the new SES Astra service in January 2011); and Vivacom TV (launched in September 2010 by the Telecom operator Vivacom).

¹ Source: Council for Electronic Media, report 2011 - <http://www.cem.bg/>; Ministry of Culture; MAVISE - <http://mavise.obs.coe.int/country?id=29>.

Cable is available in more than 40 % of Bulgarian households. About 25 % of the households had satellite services (19 % pay satellite) at the end of 2010. There are also four IPTV services available:

- **Nonlinear media services.** In 2009 the first ever provider of **nonlinear media services of the Video-On-Demand type as well as of Pay-Per-View** emerged. By March 2011 the number of providers stood at 7, while by March 2012 there were 10 providers of nonlinear media services.

- **Audiences.** According to information of the Council for Electronic Media (provided by the TV broadcasters), new trends are discernable in the distribution of the audiences of the TV broadcasters in 2009-10. The survey comprises 55 TV channels with the first 10 in terms of audience shares given in the table herein bellow. As a whole, a slight increase in the shares is witnessed with new players, such as SKAT, Planeta, Bulgaria Cable and TV Varna climbing up. bTV stably holds the lead, having a serious advantage and slightly growing share (36.9 % in 2007). The public Bulgarian National Television (BNT) has been replaced from its third position in 2007-08 and after its lowest point in 2009 the share of its audiences went up by 3 % in 2010, which was the last observed year for the time being.

Audiovisual Media Services Directive: Broadcasting European works and productions of independent producers

In conformity with the Directive, encouraging broadcasting of European works, almost all the TV broadcasters have seen a growth over the recent couple of years. However, some of them do not meet the requirement that more than half of all the programmes broadcast ought to be European productions (Article 19a of the Radio and Television Law), maybe because of the wishful nature of the text “where possible”. The type of the channels also has an impact, varying from 0.5 % to 100 %; specialized film channels and folk music channels, for instance, occupy the top and the bottom of the table. As for the polythematic broadcasters, the Bulgarian National Television holds the lead. According to the same information (which does cover just a few of the TV broadcasters), the programme time share of European productions, made by independent producers, accounts for less than over 30 % with, of course, a high degree of deviation between individual channels. What is noteworthy is how many of these works have been made over the recent five years. With bTV, Nova TV and TV Varna we have a good balance of high participation of external producers and the best part of the broadcast productions being made over the recent five years.

TV broadcasters according to the audience share, broadcast European productions and productions of independent producers (%)

Television	2009				2010			
	Audience share	European productions (as a percentage of the total broadcast time)	European productions (independent producer as a percentage of the total broadcast time)	European productions made by independent producers over the recent five years (as a percentage of the total broadcast time)	Audience share	European productions (as a percentage of the total broadcast time)	European productions (independent producer as a percentage of the total broadcast time)	European productions made by independent producers over the recent five years (as a percentage of the total broadcast time)
bTV	35.3	73.9	24	24	38.3	71.7	30.5	-
SKAT	23	99	3	2.3	25	99	3	2.4
Planeta	20.9	100	12.5	4.0	14.3	100	12.9	4.6
Nova TV	20.6	59.7	16.5	14.7	14.5	66	23.7	22.1
TV Varna	16.5	65	21	14.1	15.8	65	21	15.1
Evropa TV	11.4	30	0.5	0.3	12.6	42	1.5	0.9
Bulgaria Cable (BGTV)	11	75	12	1.2	14	72	9	1.2
BNT	9.7	79.2	21.1	1.6	12.5	76.3	11.8	0.3
NBT	8	52	11	-	7.6	50	13	-
Super 7	3.3	41	6	0.4	4.5	40	4	4

Source: According to information provided by the CEM, the MoC and the Observatory of Cultural Economic,

• TV programme measured in hours

In terms of hours, the TV programme has seen almost double dynamism in the period under review 2000–10: from 395 369 in 2000 up to 660 775 by the end of the period. Once again, the highest dynamism has been witnessed over the recent years.

Licensed and registered TV broadcasters in the period 2000–2010

Year	2000	2003	2006	2007	2008	2009	2010
Number of TV broadcasters	86	98	102	110	119	113	100
Programmes (h)	395 369	498 091	599 135	661 872	747 036	694 778	660 775

Source: National Statistical Institute, 2012, <http://www.nsi.bg/otrasal.php?otr=24>

- The regional distribution of the TV broadcasters is nonequilibrium, being concentrated in the south-western region, part of which is Sofia, with the number of broadcasters amounting to 55 in 2008 and to 50 in 2010, while the TV broadcasting there accounts for 50% of the total of hours.

TV broadcasters per statistical regions in the period 2007–2010

Statistical regions	2008		2009		2010	
	Number of TV broadcasters	TV Broadcasts (h)	Number of TV broadcasters	TV Broadcasts (h)	Number of TV broadcasters	TV Broadcasts (h)
Countrywide	119	747 036	113	694 778	100	660 775
Northern and South-Eastern						
▪ North-Western	9	42 667	6	30 660	5	25 395
▪ Central Northern	8	55 422	8	51 154	6	38 913
▪ North-Eastern	13	75 648	9	48 560	9	41 126
▪ South-Eastern	16	91 590	18	88 902	15	98 947
South-Western and Southern Central						
▪ South-Western	55	398 927	54	407 980	50	367 896
▪ Southern Central	18	827 82	18	67 522	15	88 498

Source: National Statistical Institute, 2012, <http://www.nsi.bg/otrasal.php?otr=24>

The Bulgarian National Television and Bulgarian TV filmmaking

- Pursuant to Article 71 (2) of the Radio and Television Law, the Bulgarian National Television supports the making and broadcasting of national audiovisual productions, allotting for new Bulgarian TV film productions no less than 10 percent of the support allocated from the national budget for television.

The table herein below is indicative of the degree to which these obligations are met, showing: the amount of the state subsidy adopted for the BNT budget, used as a basis for forming funds pursuant to Article 71 (2) of the Radio and Television Law, as well as the amount of the utilized sum according to the reports on the budget cash performance of the BNT in the period 2007-11.

Funds for filmmaking according to the budget of the Bulgarian National Television in the period 2007–2011 (in BGN; 1 BGN = 0.511 EUR)

Year	Amount of the subsidy in the BNT budget, used as a basis for forming funds for filmmaking	Funds for filmmaking, adopted for the BNT budget pursuant to Article 71 (2) of the Radio and Television Law	Budget cash performance on filmmaking	Difference between the decreed amount of funds for filmmaking under Article 72 (2) of the Radio and Television Law and the actual cash performance on budget item filmmaking
1	2	4	5	6 (5-4)
2007	56 000 500	5 600 050	5 369 384	-230 666
2008	57 766 500	5 776 650	3 217 821	-2 558 829
2009	61 022 880	6 102 288	2 714 032	-3 388 256
2010	51 988 000	5 198 800	2 507 441	-2 691 359
2011	52 000 000	5 200 000	4 548 370	-651 630
			Total:	-9 520 740

Source: Observatory of Cultural Economics, author's table. According to information provided by the Bulgarian National Television for the period 2007-11

- According to information provided by the BNT, the following 16 features (external and in co-production) have been funded over 2009-11, in conformity with Article 71 (2) of the Radio and Television Law:
 1. AVE, feature, co-production; script by Konstantin Bojanov, Arnold Barkus; dir. Konstantin Bojanov; produced by CAMERA – Dimitar Gochev;
 2. NO. 1, feature, co-production; script by Yavor Mihaylov, Atanas Hristoskov; dir. Atanas Hristoskov; produced by INCOMS PROJECT – Plamen Yordanov;
 3. TAKE TWO, feature, co-production; script by George Gospodinov; dir. Nadezhda Koseva; produced by ART FEST – Stefan Kitanov;

4. *FAITH, LOVE AND WHISKEY*, feature, co-production; script by Kristina Nikolova; dir. Kristina Nikolova; produced by MAGIC SHOP - Georgi Nikolov;
5. *SNEAKERS*, feature, presale, script by Valeri Jordanov; dir. Valeri Jordanov, Ivan Vladimirov; produced by GALA FILM – Galina Toneva, Kiril Kirilov;
6. *SHADOWS*, feature, co-production; script/dir. Milcho Manchevski; produced by CAMERA – Dimitar Gochev;
7. *GOAT*, feature, co-production; script Christin Dimitrova, Georgi Dulgerov; dir. Georgi Dulgerov; produced by BOROUGH FILM – Georgi Balkanski, Vladimir Andreev;
8. *INCOGNITA*, feature, co-production; script/dir. Mihail Pandoursky; produced by CAMERA - Dimitar Gochev;
9. *THE ISLAND*, feature, co-production; script/dir. Kamen Kalev; produced by WATERFRONTFILM – Kamen Kalev;
10. *THE DESERT RUNNER*, feature, co-production; script/dir. Grigor Lefterov; produced by MENCLIPS – GerganaStankova;
11. *SHELTER*, feature, co-production; script by Dragomir Sholev, Razvan Radulescu, Melissa de Raaf; dir. Dragomir Sholev; produced by KLAS FILM – Rossitsa Valkanova;
12. *PUZZLE*, feature, co-production; script/dir. Ivo Staikov; produced by ILS FILMS – Ivo Staikov;
13. *THE GLASS RIVER*, feature, co-production; script by Emil Andreev, Krasimir Krumov – Grets; dir. Stanimir Trifonov; produced by VREME FILM STUDIO – Stanimir Trifonov/Zornitsa Popova;
14. *TILT*, feature, co-production; script by Viktor Chouchkov Jr., Borislav Chouchkov; dir. Viktor Chouchkov Jr.; produced by CHOUCHEKOV BROTHERS – Borislav Chouchkov;
15. *HINDEMITH*, feature, co-production; script/dir. Andrey Slabakoff; produced by A.S.FILM – Andrey Slabakoff;
16. *ZINCOGRAPH*, feature, co-production; script by Vladislav Todorov; dir. Emil Christov; produced by PERIPETEIA (Buriana Zakharieva & Vladislav Todorov).

• **According to information provided by the BNT, the following 19 documentaries (external and in co-production) have been funded over 2009-11, in conformity with Article 71 (2) of the Radio and Television Law:**

1. *I AM YOU*, feature, presale, script by Vladimir Ganev, Stefan Kospartov; dir. Peter Popzlatev; produced by POST SCRIPTUM 2 – Peter Popzlatev;
2. *MONUMENT'S BROTHER*, doc., co-production, script/dir. Tamara Peshterska; produced by MAGIC MOUNT – Vasil Barkov;
3. *BIOGRAPHY OF X*, doc., presale, script/dir. Vasil Zhivkov; produced by KLAS FILM – Rossitsa Valkanova;
4. *CHILDREN OF DRUJBA*, doc., co-production, script by Svetoslav Draganov, Ivan Chankov; dir. Svetoslav Draganov; produced by SINEASTE MAUDIT – Svetoslav Draganov;

5. *DO YOU RECALL...*, doc., presale, script/dir. Maya Vaptsarova; produced by Bulgaria Film Association – Ivanka Stavrieva;
6. *THE MYSTERY OF VEDA SLOVENA*, doc., presale, script by Boris Christov; dir. Anri Koulev; produced by KOULEV FILM PRODUCTION;
7. *IN SITU*, docu-series, co-production, script by Nevena Andonova, Valeria Fol; dir. Atanas Dimitrov; produced by PROVENTUS - Nevena Andonova;
8. *BULGARIA IS A BIG MISTAKE*, doc., presale, script by Georgi Lozanov; dir. Stoyan Radev; produced by FRONT FILM – Nadezhda Koseva, SvetlaTsotsorkova;
9. *LOST IN THE CLOSED TRAIN TRACK*, doc., presale, script/dir. Konstantin Zankov; produced by MAGIC SHOP – Georgi Nikolov;
10. *THE BOY AT THE WINDOW*, doc. co-production, script/dir. Vladimir Angelov; produced by VAIK – Valeri Kostov;
11. *MARCEL CELLIER: MUSIC BEHIND THE IRON CURTAIN*, doc., co-production, script/dir. Stefan Schwietert; producer for Bulgaria: AGITPROP – Martichka Bozhilova;
12. *AGAINST THE STREAM*, doc., co-production; script/dir. Zlatina Rousseva; produced by PALIMPSEST – Maria Pavlova;
13. *RULES OF SINGLE LIFE*, doc., co-production, script/dir. Tonislav Hristov; produced by AGITPROP – Martichka Bozhilova;
14. *PRIMA PRIMAVERA*, feature, presale, script by Edelenyi Janos, Endre Hules, Paul Salamon, Maria Stankova; dir. Edelenyi Janos; produced by GEOPOLI – Georgi Cholakov, Pavlina Jeleva;
15. *FATHER IVAN AND ITS CHILDREN*, doc., presale, script by Hristo Iliev-Charley; dir. Georgi Stoev – Jacky; produced by KUGAN – Georgi Stoev;
16. *SPAICH*, doc., co-production, script/dir. Adela Peeva; produced by ADELA MEDIA 99 – Adela Peeva;
17. *CHAMPAGNE AND TEARS*, doc., co-production, script/dir. Svetoslav Draganov; produced by IZOGRAPH – Petko Gylulchev;
18. *STOICHKOV*, script/dir. Borislav Kolev, Dimitar Gochev; produced by CAMERA – Dimitar Gochev.

• **Over the same period (2009–11), the following TV shows have been made:**

- **2008–09**

A Clinic on the Fifth Floor (a sitcom of 12 episodes of 27 minutes each);

- **2010**

The English Neighbour (a mini sitcom of 4 episodes of 54 minutes each);

- **2011**

Under Cover Season 1 (12 episodes of 54 minutes each) and *Under Cover* Season 2 (12 episodes of 54 minutes each).

XI BULGARIAN FILM INDUSTRY: DRIVER OF ECONOMIC GROWTH²

In 2011, the cultural and creative industries (CCI) in Sofia were mapped, which replenished our idea of Bulgarian film industry with a lot of new information.

Employment rate in film industry is an indicator of economic and social dimensions

The rate of the employees in the cultural and creative industries was at 2.04 % in 2008 to stand at 2.34 % in 2009. These 2,182 filmmakers were responsible for almost 5 % of the growth in all the CCI in Bulgaria.

At a national level, the number of those employed in the film industry increased by 20.29 % or from 1814 employed in 2008, their number stood at 2,182 in 2009, accounting for 0.08 of the total of employees in Bulgarian economy. In 2009 film industry saw the highest employment rates in filmmaking and TV shows – up by 37.49 %, as well as in exhibition – up by 27.98 %, followed by technician's activities, related to filmmaking – up by 18.49 % and film distribution – up by 8.60 %. Borrowing of Videos/DVDs/CDs alone has slumped by 50.54 %, which shows the decay of a distributive window of film industry.

Of all the employees in film industry, the greatest is the share of these employed in filmmaking: 47.35 % in 2008 or 859 and 54.12 % or 1181 in 2009. **The increase in the public funding for filmmaking, the opportunities to make more debuts in comparison with the previous years, as well as the growing TV filmmaking is responsible for the high rates and growth of employment in filmmaking. Though not being the sector with the highest employment rates, film industry is the sector seeing the greatest dynamism of growth, and if we create a correlation between the sector growth and the sector employment, we could speak of growth efficiency, which would improve with the introduction of digitalisation.** The relative share of employed in film industry at Sofia City level in 2009 increased and the capital city amassed 85.56 % of all the employees in the business or 1,867. Such concentration of employment surpasses by 20 % the presence of all the rest of the creative industries in Sofia, making the capital a major habitat of audiovisual industry.

²This entry was written by Assoc. Prof. Bilyana Tomova and Diana Andreeva, citing the study „Mapping of the cultural and creative industries in Sofia“, which is a joint project of the Observatory of Cultural Economics and Sofia Municipality, carried out in 2011.

Though the share of the employed in film industry is relatively small within the Bulgarian economy as a whole (typical of the industry across Europe), as well as within the cultural and creative industries, it is noteworthy that in 2009 as against 2008 film industry is among the three sectors, witnessing the highest employment rates of all the cultural and creative industries at a national level: third position with 20.3 year-on-year growth.

At Sofia City level, design once again saw the highest growth rate in terms of employment, but surprisingly, film industry saw the second highest employment growth rate at 26.8 %, followed by software and videogames at 25.7 %. The higher growth in film industry at Sofia City level is due to the relatively higher concentration of the sector in the capital (85.6 % of the employed are within the territory of the municipality). From the above, we could infer a conclusion that, unlike the fields of design, software and videogames, where this is a world phenomenon and the trend in Bulgaria keeps pace with the increase in the employment rates worldwide, in the case of film industry, it is rather a national phenomenon and the fastest growing sector of all the cultural and creative industries, which is not influenced even by such external factors as the financial and economic crisis to the same extent as the other sectors of the cultural and creative industries.

Businesses in film industry: the higher the employment rates in film industry, the higher the number of businesses

The trend of the employment rates increasing tells upon the number of the businesses within film industry, which has gone up from 461 in 2008 to 618 in 2009. The highest growth witnessed was in the number of businesses in filmmaking: these scaled by 101 as against 2008. Film industry makes no exception of the rest cultural and creative industries in terms of the highest number of micro businesses with two employees. In 2008 such companies accounted for 70.72 % and 2009 for 75.56 % of all the companies within the film industry. The limited project funding in a highly competitive environment does not encourage sustainability and growth in employment, nor expanding of businesses and hiring more employees. The turnover of film businesses also saw a growth from almost 173m levs in 2008 to some 216m levs in 2009. The greatest is the number of film businesses reporting turnover of up to 50 000 levs (or 25,000 euros), which is a symbolic amount, indicating survival on the market, rather than increases in production employment. In 2009, there were 369 such businesses mostly in filmmaking. More often than not, the newly opened film businesses have no activities, but show interest in being part of the film processes, drawn by the obvious sector upsurge. Such figures are indicative of the openness and the easy accessibility to the market (on more

than one occasion just registration at the National Film Centre is required), but hard to keep on and just a few companies generate high and sustainable turnover.

Foreign direct investment (FDI) in film industry is the sole of the indicators under consideration, which has dropped slightly from some 30m levs in 2008 down to 29m levs in 2009. Value added at factor payments or **the economic contribution generated by film industry amounted to some 46m levs in 2008 and to some 60m levs in 2009. The greatest contribution to the value added was that of the sub-sector of filmmaking, which grew from some 28m levs to about 45m levs. In percentage terms, film exhibition saw a growth by almost 100 % and filmmaking by some 58 % as against 2008. Film industry generated several times higher economic contribution through value added as compared to the public funding allocated by the National Film Center and the Bulgarian National Television. Most interestingly, value added, as a whole, i.e. the economic contribution of the cultural and creative industries went down in 2009 as against 2008. Just three sub-sectors saw a positive growth in 2009: cultural heritage, software and videogames and film industry with growth of 32 %.**

What are the reasons for the economic growth in film industry?

Over the recent years, the making of Bulgarian films has started growing with one of the reasons being in the stabilized public support. Under the Film Industry Act, the state aid has to secure the making of at least 7 features, 14 documentaries and 160 minutes of animated films on a yearly basis. The major reason for state interference stems from the frequent and numerous failures of the market in the area of culture, predetermined to some extent by the scope of the market and the specifics of individual sub-sectors. Bulgarian film industry has the typical characteristics of a European country: a small market, representing a closed language community. The scope of film industry market requires at least 60 million consumers so that a product to stand the chance of paying off, while Bulgaria's population is mere 7.2 million. The products of Bulgarian film industry are not classical market products and as is the case with the rest of the European film industries, the state is called to considerably support this sector, which is an undoubted generator of national cultural capital. Bulgarian film industry is an intrinsic part of the European continental model, where cinema is an inseparable unity of two components: art and cultural industry. Apart from the aesthetic, there are objective factors, which predestine the impossibility to profit from an art-film product.

- In Bulgaria, the monopoly of a single film distribution company (representative of leading Hollywood companies with growing number of own cinemas) imposes disregard for the distribution of Bulgarian films;
- The defunct film exhibition network (now, apart from the multiplexes, there are cinema theatres in just 17 Bulgarian towns) denies the best part of Bulgaria's population, who make it crystal clear that they want to be shown Bulgarian films, access to Bulgarian movies whatsoever.
- As a result, we have a total fragmentation of the sub-markets of the national film industry!

The state supports around 50 % of the production, partially regulates distribution (specified by the Act, but actually no fines are being imposed on exhibitors for not meeting the national film quotas) and is not involved in the infrastructure of exhibition, which establishes more and more vertical monopolistic type of relationship with the distributors.

Another trend we have seen is that of the increasing number of movies made in co-production, also typical of the development of European film industry. Bulgarian co-productions suggest good producing, inventive creative ideas, which draw investments, and last but not least, cheaper skilled labour in better working conditions. In an environment of financial and economic crisis, in Bulgarian context, though the public funds for filmmaking have been drastically cut, film industry sees an upsurge and improving economic efficiency in the sector.

These outcomes are indicative of the fact that using public funding as a source of investment in the activities of film industry subsequently generates value added to make it a factor of an increase in national wealth.

The high concentration in Sofia City is not in terms of employment alone. In 2009, almost 77 % of the film businesses were concentrated in Sofia, which is by 2 % more as against 2008. And then again 99 % of valued added, FDI and turnover in film industry are concentrated in Bulgaria's capital city.

Up to now, film industry was considered as a sector, which is granted subsidies and has an 'unconvincing' economic contribution and many have voiced concerns that there was no such contribution at all and the government was just dishing out several millions on a yearly basis without any economic output whatsoever. Public funding was motivated by cultural and social effects, which had, over the years, incited either increases or reductions in public funds. It is for the first time ever, however,

that film industry proves that we could add economic efficiency to its social and cultural 'efficiency'. Furthermore, the sustainable development of the sector, its internal logic and dynamism of development, due to the specifics of the long turnover of the invested funds, are not that prone to shocks, external to the environment, as most of the rest of the cultural and creative industries are. The economic proofs that film industry multiplies the received public funds, generating higher employment, value added and turnover growth, etc., places the sector among the leading ones within the cultural and creative industries. Countries, relying on sustainable economic growth, make long-term investments in sectors having potentials, which would generate value added for their economies as a whole. In Bulgarian context, film industry promises to become a sector that could be a driver of sustainable economic growth given wise economic policy-making, prioritising cultural and creative industries, as well as a long-term cultural strategy, based on precise and profound analyses, transparency and interinstitutional dialogue with creative organizations, NGOs and all the stakeholders.

XII CONTACTS OF INSTITUTION, COMPANIES, AND ORGANIZATIONS

FILM SCHOOLS

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NEW BULGARIAN UNIVERSITY, SOFIA

Cinema, Advertising
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Activities: feature films facilities, visual effects

BUZZ FILMS

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CONTENTS

EDITORIAL.....	2
I. LEGISLATION	3
II. FILM EDUCATION	6
III. STATE SUPPORT	8
IV. FILM DISTRIBUTION	15
V. CINEMAS	22
VI. FESTIVALS	27
VII. AWARDS FOR BULGARIAN FILMS ABROAD	29
VIII. INSTITUTIONS	32
• <i>BULGARIAN NATIONAL FILM CENTER</i>	32
• <i>NATIONAL FILM ARCHIVE</i>	33
• <i>UNION OF BULGARIAN FILM MAKERS</i>	33
• <i>FILMAUTHOR</i>	33
• <i>NATIONAL CULTURE FUND</i>	33
• <i>INSTITUTE FOR CULTURE</i>	34
• <i>OBSERVATORY OF CULTURAL ECONOMICS</i>	34
IX. INTERNATIONAL FILM SUPPORT	35
• <i>MEDIA PROGRAM</i>	35
• <i>EURIMAGES</i>	37
X. TELEVISION	39
XI. BULGARIAN FILM INDUSTRY:	
DRIVER OF ECONOMIC GROWTH.....	46
XII. CONTACTS.....	51
CREDITS AND PUBLISHER'S CONTACTS	64

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