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**RUSSIAN**  
**FILM INDUSTRY**  
R E V I E W

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is the follower of All-union association SOYZINFORMKINO, which was organized on September, 25th, 1963 for information-advertising work on the Soviet film promotion.

Company overall objective is the edition of magazines KINOMEHNIK and MANAGER.KINO, annual review RUSSIAN FILM INDUSTRY, periodical printing editions RUSSIAN INTERNATIONAL FILM MARKET DAILY and CPS Daily.

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is a b2b information resource for the professionals of the film industry, cinema managers, exhibitors, distributors, producers and film promotion specialists.

The main **METROPOLITAN E.R.A.** project is a weekly email newsletter b2b outlet called **BOOKER'S BULLETIN** that gives a complete and objective analysis of the events and tendencies in the Russian film industry. The electronic newsletters normally consist of: Russian box-office and statistics; Analysis and monitoring of local film market, forecasts of its development; Experts' opinions on general current problems of film distribution; Estimating and pre-start evaluation of the movies released in Russia; Reviews of advertising campaigns of various movies; Weekly updated schedule of film releases for the next two years.

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"**Action!**" is a unique professional outlet that presents the complete landscape of the Russian film industry. "**Action!**" gives statistic on film production, film distribution and releasing in CIS. "**Action!**" contains interviews with the significant people from film industry (CEO of TV channels, producers, distributors, cinema circuits managers, etc.)

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# **RUSSIAN FILM INDUSTRY REVIEW 2009**

**METROPOLITAN ENTERTAINMENT RESEARCH AGENCY** is a B2B information resource for the professionals of the film industry, movie theater managers, exhibitors, distributors, producers and film marketing specialists.

**METROPOLITAN E.R.A.** runs a unique database that contains contacts and information on all the contributors of the Russian movie industry. This information might be extremely useful for all the people that are interested in investing in the torrentially developing film business in Russia.

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The primary **METROPOLITAN E.R.A.**'s project is called **BOOKER'S BULLETIN** which is a weekly e-mail newsletter that gives a complete and objective analysis of the Russian movie industry. It was founded in 2003 as the weekly newsletter e-zine and the monthly printed magazine. The printed edition contains the most recent and exact statistical data on film distribution and film production, the full analysis of Russian film and TV industries, experts' opinions, interviews with the people involved in the industry, estimates for releases in Russia, and regularly updated schedule of film releases for the next two years.

Weekly newsletters are sent over to more than 2000 e-mails all over the CIS. The circulation of the monthly full-color print version exceeds 5 000.

The electronic newsletters normally consist of:

- Russian box-office and statistics;
- Analysis and monitoring of local film market, forecasts of its development;
- Experts' opinions on general current problems of film distribution;
- Estimating and pre-start evaluation of the movies released in Russia;
- Reviews of advertising campaigns of various movies;
- Weekly updated schedule of film releases for the next two years.

Apart from the newsletter edition of **BOOKER'S BULLETIN** there is also the printed version of it. The paper version **BOOKER'S BULLETIN** monthly supplement is distributed via the database of the agency (more than 2 000 subscribers), at the Russian International Film Market, at most significant film festivals and other industry events.

The printed magazine contains the following sections:

- Global and Russian statistics;
- Analysis of the past period and forecasts of the future one;
- Experts' opinions on the current problems of film distribution;
- Qualitative and quantitative researches in theatres in various regions of Russia;
- The box-office analyses of the preceding period;

Since 2009 the *Action!* magazine in Russia is published along with the printed version of **BOOKER'S BULLETIN**.

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# STATE AUDIOVISUAL SUPPORT AND THE ACTIVITIES OF PUBLIC ASSOCIATIONS

*Konstantin Nafikov, Anastasia Chudakova, RFilms*

## MAIN FINANCIAL ACTIVITIES OF THE STATE SUPPORT IN 2009

In 2009 the state support in the field of film industry was implemented in the following areas:

- film production;
- film distribution and client servicing;
- development of international collaboration;
- research and development in the field of cinema;
- centralized purchase of film stock.

In 2009 the state financial support in the field of film production was oriented towards supporting production in the volumes possible in the state of world and national economic crisis, as well as towards creating diverse and substantial thematic and genre Russian film programs, towards creating films that have social significance for mass audience.

Following the long tradition of national film industry the priority in feature film production remained the creation of

*Table 1. STATE SUPPORT IN FILM PRODUCTION IN 2006–2009 (RUR, MLN)*

FILM TYPES	NUMBER OF FILMS RELEASED				GROSS INVESTMENT (RUR, MLN)			
	2006	2007	2008	2009	2006	2007	2008	2009
<b>Fiction films (total)</b>	105	78	101	78	1 658	1821	1 970	1 689
Feature films	103	66	89	66				
Film almanacs	2	12	12	12				
<b>Documentary films (total)</b>	483	555	612	326	415	493	430	413
<b>Animated films (total)</b>	65	137	160	151	285	325	319	342
<b>Total number of films and videofilms released</b>	629	770	873	555	2 359	2 641	2 740	2 445

Source: Ministry of Culture of the Russian Federation

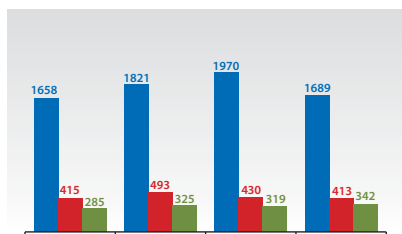


Chart 1. STATE FINANCIAL SUPPORT BY TYPES OF FILM PRODUCTION IN 2006–2009 (RUR, MLN)

- Fiction films
- Documentary films
- Animated films

Source: Ministry of Culture of the Russian Federation

films for children and adolescents, films about the life of the country today, as well as films about Russia’s war-time and historical past, screen adaptations of literary classics, films in popular genres and young filmmakers’ debuts. In the field of animation the priority of state support lay in the creation of animated series and feature animated films, outstanding in their creative and commercial potential. In documentary and science and educational film the main attention was directed towards the projects of Russian film-chronicle, full-length film journalism and educational films dealing with topical issues of modern life.

The state financial support was used in 78 feature and short-length fiction films, 326 documentary films and 151 animated films, including 2 feature animated films that were completed in 2009.

In 2009 the state policy in the field of film distribution was directed mainly towards end-to-end solution of problems of maintaining and development of the national distribution chain, towards strengthening of national film industry’s position on the Russian and world market.

During the year 85 events that promoted Russian films were conducted in 50 regions of the Russian Federation using the state financial support. 46 feature fiction films and 2 feature animated films received state support that totaled 91 million roubles for their promotion and distribution as well as for the printing of copies.

Viewing film festivals as an effective way of determining, supporting and promoting the national and international creative achievements in film and their most promising ways of development, in 2009 the most important Russian and international film festivals on the territory of Russian Federation received financial support from the Ministry of Culture that totaled almost 100 million roubles.

As part of the process of the development of international contacts in film industry in 2009 42 Russian films were presented at international film festivals around the world, and 5,228 screenings of Russian films were conducted abroad with the financial support of the Ministry of Culture.

In 2009 as well as in the previous years the development of new technologies in the field of film industry were conducted with the support of the Ministry of Culture under the auspices of the federal program “The Culture of Russia (2006-2010)”.

In 2009 a series of measures that ensure the purchase of about 12 million meters foreign film stock (63% of which is by manufactured “Kodak” and 37% - by “Fuji”) was implemented. This allowed to fully provide the production of fiction films and documentary films, produced with the financial support of the state, with the needed quantity and quality of materials. Besides that, the printing of copies of the films that received state financial support in the field of distribution was also provided for.

## **THE CHANGES IN FEDERAL LAW AND STATES INITIATIVES IN FILM INDUSTRY IN 2009**

In 2009 the work of the Russian Federation's Ministry of Culture was directed towards the solution of strategic tasks in the area of state regulation and support of the national film industry. The main of them were:

- creation of the unified federal computerized system of information concerning film screenings that would allow to make public and official the data about film attendance and their income;
- the restructuring of the industry's infrastructure by using the mechanisms of state-private partnership (SPP) in the fields of film production and exhibition including the creation in small and middle-size towns a chain of digital screening halls and multi-functional cultural centers operated by private organizations;
- the drawing of regional and municipal executive bodies into the work of reviving the film segment of the national economy, of attracting private (including foreign) capital, of using geographical, climate, infrastructure and personnel advantages in order to create a unified cinema space on the territory of the Russian Federation;
- Improvement of the mechanism of the state support in the field of production and distribution of national films in order to achieve a more coherent structure of financing film projects.

In accordance with the Federal statute №308-FZ of December 30, 2008 "About the changes in the Federal statute "About the placement of orders on delivery of goods, execution of work and providing services for the state and municipal needs" and other legal acts of the Russian Federation"

changes were made in the federal statute № 126-FZ of August 22, 1996 "About the state support for the Russian Federation's cinema" and in the federal statute № 94-FZ of July 21, 2005 "About the placement of orders on delivery of goods, execution of work and providing services for the state and municipal needs". This initiative made it possible to provide state financial support in the field of film production in the form of subsidies.

In accordance with the changes the state financial support can be carried out by a federal executive body in the form of subsidies from the federal budget in the cases and in the order that are stipulated by the federal statute on the federal budget for the given year and the given planning period as well as by the legal acts of the Government of the Russian Federation that comply with the statute.

Provisions of the Federal Statute № 94-FZ in respect to cinema hold a certain contradiction, since a completed film or services in the area of its promotion and distribution are not acquired for the needs of the state but remain on the market instead. The state support is oriented towards the development of the creative process and the increasing of cinema's accessibility for the masses. At the same time normative legal documents did not answer to these specifics of the state policy in the field of cinema. That is the reason of introducing the new mechanism of the state financial support for the film industry in the form of subsidies. They will be provided as a gratuitous state support in the form of partial or full state investment in production and distribution of national fiction films, documentary and animated films.

The state support is given to films that receive the "national film" status. This status makes them legible for receiving all forms of state financial support as well





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as for the exemption from VAT. In 2009 changes were made in the Federal Statute № 126-FZ of August 22, 1996 "About the state support for the Russian Federation's cinema" that widen the possibilities for film co-production with the countries that don't have international agreements with the Russian Federation and are not members of the European convention of film co-production. According to the changes in the Federal Statute № 126-FZ of August 22, 1996 "About the state support for the Russian Federation's cinema" a film is given the "national film" status on the condition that:

1. the producer of the film is a Russian Federation's citizen or a legal person registered in the legally established order on the territory of the Russian Federation;
2. the majority of the film's authors are citizens of the Russian Federation;
3. no more than 30% of people that don't have a Russian Federation's citizenship are a part of the film's crew (including directors, cinematographers, sound directors, art directors, costume designers, editors, main actors);
4. the language of the film is Russian or other language of the people of Russian Federation excluding cases when the use of a foreign language is an integral part of the film's concept;
5. no less than 50% of the film's estimated cost of production, copying, distribution and exhibition is done by film organizations registered in the legally established order on the territory of the Russian Federation;
6. foreign investment in the film production does not constitute more than 50% of the film's estimated cost.

The status of national film can also be applied to a film that is produced in accordance with international agreements of the Russian Federation in co-production

with film producers that are foreign citizens, people without a citizenship or a foreign legal person.

In accordance with the Federal Statute № 126-FZ of August 22, 1996 "About the state support for the Russian Federation's cinema" the state financial support for the production of a national film cannot exceed 70% of its estimated cost. In exceptional cases that take into account the artistic and cultural significance of the project the federal executive body in the field of cinema can make a decision to provide state financial support of a national film in the sum up to 100% of its estimated production cost.

In 2009 the system of the state support in the field of production and distribution of national films underwent significant changes. In December 2009 in accordance with the decision of the Government council for the development of national cinema a new Federal foundation of social and economic support of national cinema was created (Decree of the Government of the Russian Federation № 1215, December 31, 2009). The Foundation's main aims are the support of national cinema, the rise of its competitiveness, providing conditions for creation of high-quality films that answer to national interests as well as popularization of national films in the Russian Federation and abroad.

The Foundation's main goals are:

- help in implementing socio-economic programs in the field of national cinema;
- providing financial support to organizations that deal with the production, distribution, exhibition and promotion of national films;
- attracting of Russian and foreign investors in the field of production, distribution and exhibition of national films;

- accumulation of financial resources for the development of national film industry, including the production, distribution, exhibition and promotion of national films as well as implementation of non-commercial film events;
- support of film experts, specialists and businessmen working in film industry.

In 2010 4.9 billion roubles will be provided from the state budget for the state support of the film industry (Decree of the Government of the Russian Federation № 1215, December 31, 2009). This support will be conducted both by the Ministry of Culture and by the newly-created Federal foundation for the social and economic support of the national cinema.

*Ministry of Culture of the Russian Federation.* The budget is 850 billion roubles. The recipients are the companies that deal with production and distribution of films for children and adolescents, of national debuts, experimental fiction film, film almanacs, documentary and science films, national animated films. The mechanism of the funds' distribution – state subsidies on a competitive basis.

*Federal Foundation for the Social and Economic Support of the National Cinema.* The budget is 2.86 billion roubles, of which:

- 2 billion roubles go for financial provision of the costs of production, distribution, exhibition and promotion of national fiction feature films produced by the national top production companies.
- 300 million roubles go for the support of films that reach an audience of 1 million viewers.
- 560 million roubles for the production of socially-significant films.

The national top production companies that receive financial support. In 2010

8 companies were named the leaders in film production. Each company will receive 250 million roubles (about 6 million euro). They are:

- CTB Film Company (producer Sergey Selyanov);
- Direktsiya kino (producer Anatoliy Maksimov);
- Tri Te (producers Nikita Mikhalkov, Leonid Vereshchagin);
- Central Partnership (producers Ruben Dishdshyan, Aram Movsesyan, Sergey Danielyan);
- Igor Tolstunov' Film Production Company (producer Igor Tolstunov);
- Art Pictures Studio (producers Fedor Bondarchuk, Dmitriy Rudovskiy);
- Bazelevs (producer Timur Bekmambetov);
- Rekun (producer Valeriy Todorovskiy).

The mechanism of the distribution of funds is state subsidies according to the Fund's decision.

One more change in the Federal Law № 126-FZ of August 22, 1996 "About the state support for the Russian Federation's cinema" was the decision of Unified computerized information system that would allow for the submitting, accumulation, calculation and processing of data about film screenings in film theaters on the territory of the Russian Federation.

Several projects of federal statutes are now in the process of development. They will regulate:

- providing the support in formation and development of the credit system for cinema organizations in the area of film production, investments in building and reconstruction, in purchase and the use of equipment in film production and film exhibition;
- creation of a state support system for insurance of risks in the field of film production;

- creation of stimuli for the development of cinema infrastructure, including introducing tax remissions;
- creation of mechanisms for state stimulation of sponsors.

In 2009 the program of reorganizing of cinema organizations under the state control in order to increase efficiency of the management of state property and develop the potential of these organizations was continued. A concept of restructuring cinema organizations was developed as part of the program utilizing mechanisms of state-private partnership excluding sale or reshaping of these cinema organizations.

At the present time state government bodies examine the question of creating a special scientific production complex on the basis of cinema organizations controlled by the state. This complex will combine manufacturing enterprises, high-technology postproduction and special effects companies, office buildings, exhibition space and service facilities.

### THE ACTIVITIES OF PUBLIC ASSOCIATIONS IN 2009

Around 30 public organization and associations were active in Russia in 2009. The year was marked by the number of legislative initiatives that were put forward by public associations. For instance, the Union of Filmmakers of the Russian Federation put forward an initiative for establishing a Foundation for the development of culture. Its funds should be comprised of compulsory contributions by manufacturers of audiovisual reproduction equipment intended for personal use as well as of contributions by importers of this equipment. Among initiatives put forward by the Russian Producers Guild there was a project for making internet providers responsible

for the actions of their clients that take part in distributing illegal content as well as introducing the system of monitoring the channels of content distribution and the creation of an internet database of internet pirates for the reference of professional associations. In 2010 the Russian Producers Guild actively promoted creation of a selection system for market leaders that will receive financial support from the Federal foundation for social and economic support of the national cinema. Among other public organizations the newly-created "Association of TV and Film Producers" was active in implementing a unified wage rates for film crew members. In 2009 members of the Film Critics Guild were active in introducing changes into the system of organization and control of the Union of Filmmakers. In 2010 members of the Guild proposed the creation of an alternative Filmmakers Union.

There are 51 various acting schools in Russia with about 10 000 actors graduating each year. The market is literally flooded with graduate actors and new talent agencies keep springing up to meet the demand. The necessity to create an organisation that would regulate the relationship between both parties became obvious two years ago. The decision to set up the non commercial organization The Guild of Actors' Agents was taken on the 5th of March 2008, however, the Guild officially came into existence on November 14th. The Guild's full name is The Non Commercial Partnership The Actors' Agents Guild. The Guild's board of directors consists of its founders, including a number of agencies, such as MAX, Art-House, AGNI-Kino, Protégé Management, 24 Talent Agency, Ekran, as well as Elena Chukhrai, Irina Vasina, Dmitry Grinshetein and Anna Ostrovskaya. Presently the Guild's members include 15 agencies and agents representing about 500 top actors.

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# FILM AND TV PRODUCTION MARKET

Konstantin Nafikov, Anastasia Chudakova, RFilms  
Zinaida Shumova, Informkino

In 2009 the gross capital investment in film and TV production was about 19.5 billion roubles. In spite of the economic crisis the volume of capital investment didn't experience any major changes compared to 2008. Investments increased in the TV-series and film production segment while at the same time the segment of TV films production experienced a sharp drop (more than 50%).

## FILM PRODUCTION

In 2009 112 feature films\* were completed in Russia, including 107 fiction films and 5 animation films. The gross production budget for these films totaled 9.8 billion roubles and was up 10 percent from 2008.

In 2009 there was a growth in the average film production budget which can be attributed primarily to the growing number of big budget film projects (with the budget over 200 million roubles). There were 9 of these films in 2009. The number of middle-budget projects (with the budget ranging from 90 to 200 million roubles) totaled 21 films.

Among the Russian film market leaders the highest production rate was exhibited by Central Partnership (9 films). Only 4 companies (Mosfilm and Lenfilm Studios, Koktebel and Ugra-film) had more than 3 films in production. Among the leaders of recent years the rate of production

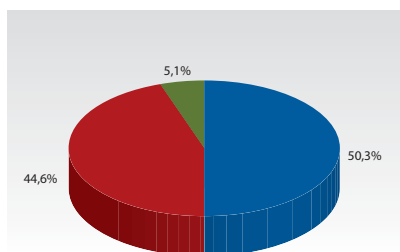


Chart 1. CAPITAL INVESTMENT IN FILM AND TV PRODUCTION

- Feature films
- TV series
- TV films

Source: RFilms, companies statistics

was kept by Krasnaya Strela (2 films), Monumental Pictures (2 films), Direktsiya Kino (1 film) and Real Dakota (1 film). 2009 was distinguished the by the move of such big TV market players as Star-Media, Lean-M and Amedia into film production market. The majority of market players (130 out of 150 companies) took part in only one project.

In 2009 there can be noted the growing activity of state film studios in the field of film production. It indicates that in the time of the economic crisis film studios such as Mosfilm and Gorky Studio were forced to take part in film projects

\* This estimate includes films in the production of which domestic capital dominated, films that received distribution certificates from the Russian Federation Ministry of Culture in 2009 as well as films that premiered at film festivals or at film theaters in 2009.

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as production companies in order to maintain their production capacity.

## TV PRODUCTION

In 2009 the gross capital investment in TV series and TV films production was 9.7 billion roubles which is more than 20% down compared to the figure for 2008. This decrease is accounted for primarily

by the lowering cost of TV content manufacture (about 30% in roubles and 50% in dollars). At the same time in 2009 TV series production experienced a significant rise, especially in the segment of big budget short-form series (up to 26 episodes). Another major tendency for 2009 was the sharp decline in the segment of TV films production. This can be explained by the fact that TV channels

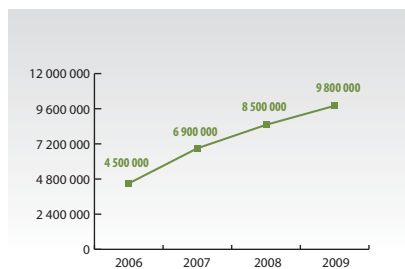


Chart 2. **GROSS CAPITAL INVESTMENT IN FILM PRODUCTION (RUR, THSD.)**

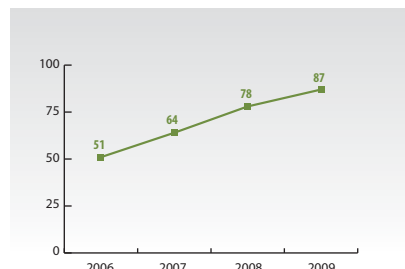


Chart 3. **AVERAGE FILM PRODUCTION BUDGET (RUR, MLN)**

Source: European audiovisual observatory, RFilms, companies statistics

Source: European audiovisual observatory, RFilms, companies statistics

Table 1. **RUSSIAN FILMS WITH THE BUDGET OVER 200 MLN RUR**

TITLE	PRODUCTION COMPANY	TOTAL GROSS (RUR, MLN)
Interceptor	Rus Media, PS TVC	55
The Book of Masters	Walt Disney Motion Pictures	316
The Inhabited Island (Film Two: The Fight)	Art Pictures Studio, Non-Stop Production	204
The Justice of Wolves	LinaPro, Accent Studio	To be released in 2010
The Way	Way Film Company	24
By the Will of Ghenghis Khan	Urgel V, Nyamgavaa Film Production	42
Taras Bulba	Central Partnership, Russia TV Chanel	575
Tsar	Pavel Lungin Studio	152
Black Lightning	Bazelevs, Universal Studios	595

Source: RFilms, Russian Film Business Today Magazine, Booker's Bulletin





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and production companies had formed a significant stock of unrealized projects.

In 2009 more than 3.000 episodes TV series were produced. Of this number more than 2.000 episodes were the episodes of long-form series (more than 26 episodes) and more than 1.000 episodes were the episodes of short-form series (up to 26 episodes).

The gross capital investment in TV series production totaled 8.7 billion roubles. The biggest production companies in 2009 were Teleallians Media Group (Zodiak Television), Kostafilm (STS Media) and Lean-M (Sony Pictures).

The gross capital investment in TV films production totaled around 1 billion roubles. The leaders in this field in 2009 were Russkoe and Star-Media companies.

## PRODUCTION CAPACITY

### Film studios

Out of 15 state film studios only 7 were active in 2009, meaning that they offered their soundstage space for rent as well as a range of services connected to film production. The total area of these studios is more than 100 hectares. They

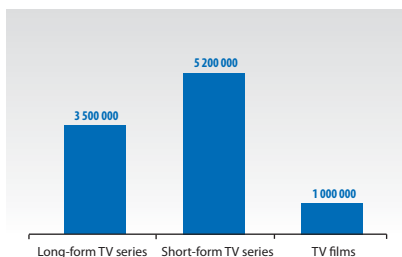


Chart 5. CAPITAL INVESTMENT IN TV FILMS AND TV SERIES PRODUCTION (RUR, THSD.)

Source: RFilms, companies statistics

were Mosfilm (14 soundstages), Lenfilm (4 soundstages), Gorky Film Studio (5 soundstages), Sverdlovsk Film Studio (2 soundstages), The Center of National Film (5 soundstages), Lennauchfilm (2 soundstages) and St. Petersburg Documentary Film Studio (1 soundstage).

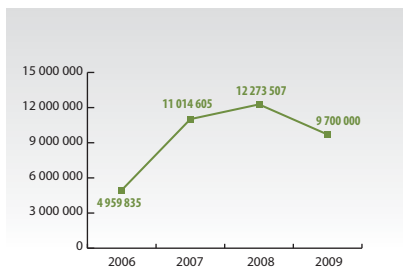


Chart 4. GROSS CAPITAL INVESTMENT IN TV FILMS AND TV SERIES PRODUCTION (RUR, THSD.)

Source: European audiovisual observatory, RFilms, companies statistics

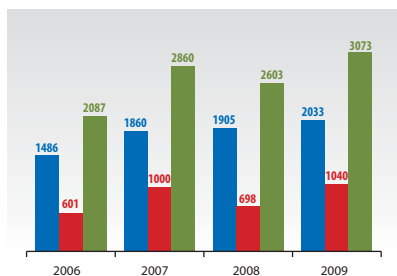


Chart 6. NUMBER OF TV SERIES EPISODES BREAKDOWN

- Long-form series
- Short-form series
- Total

Source: RFilms, Manager.Kino Magazine companies statistics

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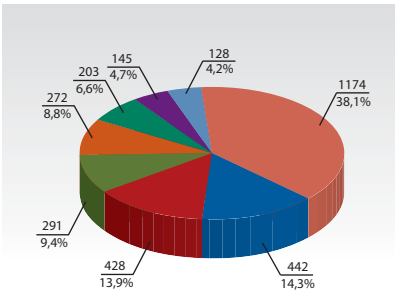


Chart 7. TV SERIES PRODUCERS MARKET SHARE IN 2009

- Telealliance Media Group
- Kostafilm
- Lean-M
- Novella
- Star-Media
- RWS
- Forward Film
- Others

Source: RFilms, Manager.Kino Magazine companies statistics

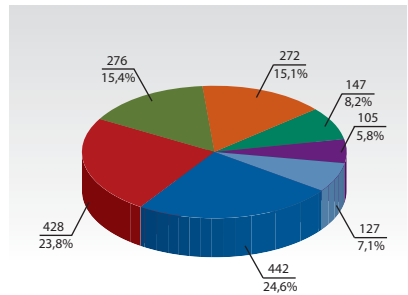


Chart 8. MARKET SHARE OF LONG-FORM TV SERIES PRODUCERS IN 2009

- Telealliance Media Group
- Kostafilm
- Lean-M
- Novella
- Star-Media
- RWS
- Others

Source: RFilms, Manager.Kino Magazine companies statistics

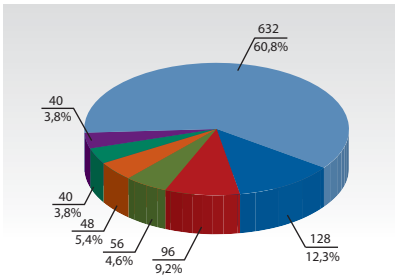


Chart 9. MARKET SHARE OF SHORT-FORM TV SERIES PRODUCERS IN 2009

- Forward Film
- Central Partnership
- Star-Media
- Mostelefilm
- Gamma Production
- RWS
- Others

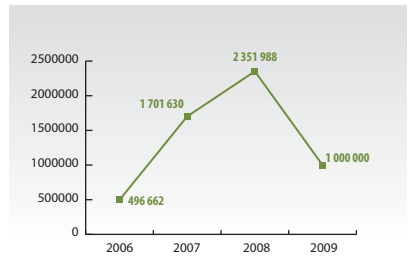
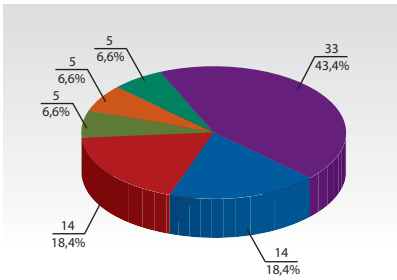


Chart 10. GROSS CAPITAL INVESTMENT IN TV FILMS PRODUCTION (RUR, THSD.)

Source: RFilms, Manager.Kino Magazine companies statistics



**Chart 11. TV FILMS (1-2 SERIES) PRODUCERS MARKET SHARE IN 2009**

- Russskoe
- Star-Media
- Novaya Studiya
- Piramida
- Triiks Media Group
- Others

Source: RFilms, companies statistics

Among major private film studios Russian World Studios (7 soundstages in Moscow and 6 in Saint Petersburg), Media City (9 soundstages), My Studio and Territoriya Kino (7 soundstages each), Tvorcheskoe Televizionnoe Ob'edinenie (5 soundstages) were the most successful in 2009. Some of these studios leased soundstage space together with lighting equipment, others also offered postproduction services, not having their own equipment park for rent. Among the latter were Magic Film, Donskaya 32, Territoriya Kino and others.

In 2009 more than 90 soundstages with the combined area of 66,000 square meters (the average area of one soundstage is 755 square meters) were used at Russian film studios. Among them there were 76 soundstages in Moscow (more than 80% of the total number) with the combined area of more than 57,000 square meters (more than 85% of the total area).

Several projects of film studio construction with the participation of private investors that had appeared in 2008 were not proceeded with in 2009 due to the economic crisis.

**Film service companies**

As of the end of 2009, the Russian film production market had 275 companies offering a range of services in the field of film production. There were 34 companies that leased film equipment, 35 postproduction studios, 48 computer graphics and special effects studios.

One of the characteristic tendencies on the Russian film production market prior to the 2008 crisis was the emergence of big companies dealing with providing film production with professional equipment and services at the absence of soundstage space of their own. These private rental houses as a rule have more up-to-date shooting equipment and a bigger range of it than do state studios. For example, the major part of modern film equipment at Gorky Film Studio is owned by independent private leaseholder companies. In spite of the crisis, the situation didn't undergo major changes in 2009.

In 2009 Cinelab has remained the leader among service companies on the Russian market (both in the range of services offered and the assortment of equipment). This company offers the lease of equipment as well as post-production services ranging from the development of film to the printing of copies, including digital printing. The leaders in camera rental are Rentacam and Agenstvo s'emochnoy tekhniki Segeya Astakhova (AST). Bogdan i Brigada, IMT group and X-Ray remain leaders in the rental of lighting and camera equipment.

In spite of the fact that post-production services in Russia undergo

Table 2. **NEW FILM STUDIOS PROJECTS IN DEVELOPMENT**

STUDIO	PLACE	TOTAL AREA, HECTARES
Glavkino	Moscow oblast	8
RWS Saint Petersburg	Saint Petersburg	48,1
Kinocity	Moscow oblast	2,5
Kinograd	Nizhniy Novgorod	7,5
Telefabrika	Saint Petersburg	7,5

Source: data from film companies, city administrations and the press

rapid development, the results of 2009 show that they remain the weakest link in the Russian film services market, although new companies that offer professional services (employing the newest equipment and technologies) keep emerging in this segment.

At the present time 6 full-service companies offer computer graphics services. In general in 2009 the visual effects industry has shown positive dynamics of development. Many Russian companies try to build experience in this area, and many others strive to buy equipment and hire professionals to open computer graphics, animation and 3D modeling studios.

Recording studios exist at almost every film studio and film company, but the choice of Dolby-studios is much smaller. Only several companies offer the services of digital film labs, such as Nevafilm that deals with the production of digital film copies, mastering, packaging, copying of DCP and encrypting on the basis of Digital Cinema Mastering Station DMS-2000 of the Doremi Cinema company.

### **New film studios construction projects**

The economic conditions of the crisis made the development of many investment projects dealing with creation of new film production capacities impossible. Therefore it heightens the

importance of state studios, on condition that they realize their development plans. Prior to the 2008 crisis the creation of 8 new film studios had been announced. Due to the current economic situation 3 of them are frozen, 4 are in the stage of paperwork and investment attraction and 1 are in the active phase of development. In 2009 were also announced planes of film studios construction in Primorsk Krai and Republic of Tatarstan.

The volume of gross capital investment in the building of these studios is about \$2.9 billion and the planned number of soundstages is close to 40.

### **CO-PRODUCTION**

Currently the principal decision has been adopted on Russian participation in the EURIMAGE, but the procedures necessary to put together the needed materials and draw respective documents at the level of the Government of the Russian Federation are still in execution. The Ministry of Culture and Mass Communications of the Russian Federation is charged with managing, in coordination with the Ministry of Foreign Affairs of the Russian Federation the job on participation of the Russian Federation in the activities of EURIMAGE upon formalizing the participation of Russia in that fund of co-production support.

32

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Table 3. INDICATORS OF CO-PRODUCTION PROJECTS

ACTIVITIES	2006	2007	2008	2009	TOTAL
Number of films, including:	4	10	17	8	40
<i>minor co-production</i>	2	3	6	5	17
<i>major co-production</i>	2	7	11	3	23
State support volume, (RUR, mln)	64	84	212	22	382

In 2009 was founded the association "Friends of the German-Russian Film Academy" that has the purpose to promote German-Russian cinema relations and to strengthen the exchange between German and Russian cinematographers in terms of education, production and financing of movies. The association has its residence in Cottbus, where also the Festival of East European film is taking place every year. The association consists of the representatives of authorities, film institutes, film funds and film production companies of the Federal states of Germany, such as Berlin, Brandenburg and Saxony.

During the last years there was a significant growth in the scope of projects implemented in co-production with Western countries. Between 2006 and 2009, 40 such projects were implemented. During them the overall amount of state support on the part of Russia reached 380 mln rubles.

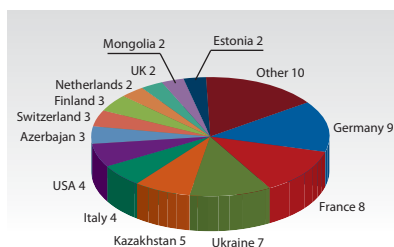


Chart 1. PARTICIPATION OF FOREIGN COUNTRIES IN CO-PRODUCTION 2006-2009







# I`m going to change my name

by Maria Saakyan

*for publicity purposes*

Production status: In pre-production Production Company:  
Anniko Films (AM), Paradise (RU), TAU Pictures (RU)  
Les Films du Requin (FR)

[www.annikofilms.am](http://www.annikofilms.am) [vika.lupik@gmail.com](mailto:vika.lupik@gmail.com) tel.: +37498615835

## CO-PRODUCTION PROJECTS IN RUSSIA\*



### The Heart of the Enemy

During WWII Eric Lindt who had always dreamed of being an aviator, becomes a fighter pilot. He loves the sky and his Motherland, and he fearlessly fights to do his military duty while at the same time trying to maintain the ability to love and to empathize with people.

The story of the whole country is reflected in the lives of three young Germans like in a drop of water. This could have happened in USSR as well. Following their story of their lives it becomes clear how a totalitarian regime can influence and change people's destinies.

It is also clear that in a lot of things the hero only "reveals" things that were already present in him, such as the ability to stand for his principles or to adjust according to circumstances and to go with the flow, certain moral qualities, a notion of honor and self-respect.

#### The crew:

<i>General producer</i>	Yuriy Shabaykin
<i>Producers</i>	Aleksey Gosteev Aleksandr Inshakov
<i>Executive producer</i>	Andrey Zakharov
<i>Script</i>	Aleksandr Vysokovskiy
<i>Director</i>	Aleksandr Vysokovskiy
<i>Assistant director</i>	Viktor Podosyonov
<i>Director of photography</i>	Maksim Shinkorenko
<i>Editor</i>	Kirill Kozlov
<i>Sound director</i>	Evgeniy Filippov
<i>Costume designer</i>	Boris Pantyukhin

#### Cast:

<i>Eric Lindt</i>	Andrey Chadov
<i>Maksim</i>	Dmitriy Mulyar
<i>Max Schelman</i>	Markus Kunze
<i>Elsa</i>	Tatyana Arntgolts
<i>Major Redlich</i>	Nikolay Kozak



#### Cinemacompany «KASKAD»

Bld.2, 4 Dmitry Ulyanov's Str., Moscow, 119333, Russia

Tel/fax: + 7 (499) 135-07-40

Email: kaskadfilm@pochta.ru

\* Not including co-production projects between Russia and the CIS countries

### **3 Russian girls in Rome**

Production Company: United Film Company (RU), IK Media (IT)  
Production period: Pre-production

### **4 days in May**

Production Company: FAF Studio (RU), X Filme (GER)  
Production period: Pre-production

### **Alaverdy**

Production Company: Anniko Films (AM), Paradise (RU), TAU Pictures (RU), Les Films du Requin (FR)  
Production period: Pre-production

### **Buddha's Little Finger**

Production Company: Rohfilm (GER), Amerique Film (CAN) Mikhail Kalatozov Fund (RUS)  
Support: Medienboard Berlin-Brandenburg (MBB), Media Development Programme, Mitteldeutsche Medienförderung (MDM)  
Production period: Pre-production

### **Celebration**

Production Company: Tandem Production (RU), Box Productions (CH)  
Support: Office Federal de la Culture Suisse  
Production period: Pre-production

### **Dau**

Production Company: Essential Filmproduktion (GER), Phenomen Films (RU), Société Parisienne de Production (FR), Plattform Production (SW)  
Support: The Russian Ministry of Culture  
Production period: Production

### **Fuga Mortis**

Production Company: Tvindie Film Production (RU), SOTA Cinema Groupe (UK), Riva Filmproduktion (GR), REZO (FR)  
Production period: pre-production

### **Hunter**

Production Company: CTB Film Company (RU), Georgian Film (GE), Salvador D (RU), Arizona films (FR)  
Production period: Pre-production

### **Kerosene Cowboys**

Production Company: Afterburner Films (USA), Svarog Films Company  
Production period: Post-production

### **Magic Cup**

Production Company: Top Line Group (RU), Taska Film (ES), ZGFilm (RU)  
Production period: Post-production

### **That Saturday**

Production Company: Passenger (RU), Bavaria Film (GER)  
Production period: Pre-production

### **The Girl and Death**

Production Company: Tvindie Film Production (RU), Jos Stelling Films (NL), Dutch Film Fund (NL), BFD (NL), AVRO (NL), COBO Fund (NL)  
Production period: Pre-production

### **Whisky & Milk**

Production Company: 12 A Film Studio (RU), Film Studio Czołówka (PL)  
Support: The Russian Ministry of Culture, Polish Film Institute  
Production period: Post-production



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[www.paradisegroup.ru](http://www.paradisegroup.ru)

Paradise group of companies is the biggest independent studio in Russia, involved in every possible field of film industry. The studio is committed to movie, video and TV content distributing, movie exhibiting and moviemaking. It also holds the annual film festival in Vyborg by the Baltic Sea.



Gevorg Nersisyan, Paradise GC CEO

The distributing company "Paradise" was founded back in 1992 when the Russian film industry was trying to survive after having collapsed along with the Soviet Union. From 1993 to 1999 it was a period for the company to settle in at the market and get involved into film and video distribution processes as extensively as it was possible.

In 1999, soon after the financial crisis had broken out, "Paradise" started to develop the exhibiting branch and opened their 1<sup>st</sup> theatre called "Rolan". It was followed by another one that turned out to be a starting point for a whole chain – "5 stars on Paveletskaya". The cinema is famous for its diverse schedule and magnificent interior. The cinema chain "5 stars" consists of 50 screens up to date, including 20 digital screens fitted with 3D equipment. Along with the newly opened "5 stars" in Samara, one more theatre is supposed to be launched by the end of the year.

Paradise group of companies is a multiproduct independent studio that is engaged in film distributing, exhibiting and production. It houses an enormous TV content library and organizes the annual Vyborg film festival. 'This multilevel business model was developed in 2003 and it works perfectly. If it didn't, we would hardly survive another financial collapse, given how far we are from the official governmental 'gravy train'', says Gevorg Nersisyan, the company CEO.

The company mostly distributes the imported projects and 2-3 features a year provided by "Paradise" production company. 'We tend not to take for distribution films produced by other companies unless we see a gigantic artistic or commercial potential in them', states Mr Nersisyan.



The arthouse course shaped back in 1995-1996 is something that "Paradise" devotedly stands for. However a certain aspiration for reinforcing the line-up with the potential hits is quite explainable and even commendable. "Furry Vengeance" is out now and is followed by "Street Dances 3D". "MacGruber", "Letters to Juliet", "The American", "The Eagle of the Ninth" are the promising releases the company is definitely counting on. Mr Nersisyan is looking forward to the action comedy "Red" as one of the biggest releases of the second half of the season. It features Bruce Willis and a whole bunch of actors in supporting roles. Soderbergh's "Knock-out" and Keanu Reeves's "Henry's Crime" are also on the list, yet to be released a bit later this year.

"Paradise" are quite consistent about promoting and exporting their own films outside Russia. Mr Nersisyan has got a proper explanation for that: 'Given the huge amount of money we invest into the projects, I'm pretty much sure we have to play a safe game. We're not interested in impressing someone, we don't depend on anything and anyone and we don't have to cheat. "Alenushka and Eryoma", our animated dilogy, is going to be shown at Toronto film festival, because there's a certain distributor in Canada eager to buy the film. But we're selling it only in case the price is equivalent to the input. We're too independent and never ask for the governmental investments, so if we intend to sell a movie, it's better to be paid much'.



Cannes Film Festival is another platform for "Paradise" to get a couple of worthy films for distribution. Mr Nersisyan says: 'We've got to purchase a few movies for Russian distribution, and I'm planning to bring back 3 or 4 big projects for the fall 2011. Actually, that's all we need'.



# FILM DISTRIBUTION AND CINEMA EXHIBITION MARKET

Svetlana Polikarpova, Metropolitan ERA  
Oleg Berezin, Ksenia Leontyeva, Nevafilm Research

## FILM DISTRIBUTION

The total box office gross for 2009 (01.01.2009-30.12.2009), including the earnings of films released prior to 31.12.08 was 24 billion roubles (18.6% up from last year) or 766.2 million dollars (5.7% down from last year).

Undoubtedly, the difference between the growth of box office receipts in roubles and their respective drop in dollars compared to 2008 is primarily due to the fluctuation of the exchange rate and the general economic crisis in the country that have led to the rise in

average ticket price. In 2009 this average was 168 roubles or \$5.4, compared to 149 roubles or \$6.0 in 2008. Therefore the number of admissions remains the most universal criterion for judging the box office dynamics. In 2009 this number totaled 142.5 million tickets and was 5.2% higher than the figure for 2008.

The market share of Russian films in this year's box office went down 4%, from 26% in 2008 to 22% in 2009. Accordingly, foreign films held 74% of the market compared to 78% the previous year.

The total number of films released in 2009 was 361, which is 4.9% or 17 films

Table 1. **FILM DISTRIBUTION 2008-2009**

YEAR	RUSSIAN FILMS / FOREIGN FILMS	TOTAL GROSS					
		RUR, BLN.	% INCREASE	\$, MLN	% INCREASE	ADMISSIONS, MLN	% INCREASE
2009	Total	23,988	+18,6%	\$766,170	-5,7%	142,509	+5,2%
	Including Russian films	5,173	-2,3%	\$165,728	-20,5%	32,289	-11,3%
	Including foreign films	18,815	+26,0%	\$600,442	-0,6%	110,220	+11,3%
2008	Total	20,220	-	\$812,537	-	135,422	-
	Including Russian films	5,293	-	\$208,461	-	36,385	-
	Including foreign films	14,927	-	\$604,076	-	99,037	-

Source: Booker's Bulletin

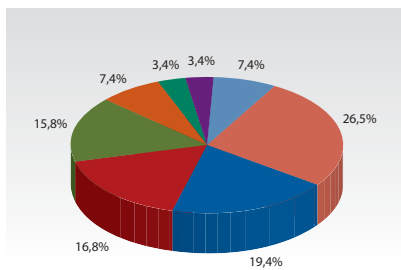


Chart 1. DISTRIBUTORS SHARE 2009

- WDSSPR
- FOX
- Caro Premier + Caroprokat
- Central Partnership
- UPI
- West
- Paradise
- Others

Source: *Booker's Bulletin*

more than in 2008. At the same time, this number included 87 (24%) Russian films and 274 (76%) foreign films. These figures show that market shares of Russian and foreign releases in the past several years (starting from 2007) have largely remained unchanged.

120 of the 2009 calendar year's releases grossed over \$1 million, which is 9 films less than the figure for 2008. Among this number there were 22 Russian films, which is 5 films less than in 2008, and 98 foreign films (4 films less than in 2008). As of 30.12.2009 20 films, released in 2009, grossed more than \$10 million each, while in 2008 the same result was achieved by only 13 films. At the same time, the total gross of the 2009 calendar year's releases that broke \$10 million mark went one-third up compared to 2008 (\$285.6 million) and totaled \$380.4 million. This total excludes the

gross of Hipsters (distributed by Central Partnership) which was released on 25.12.2008 and grossed \$12.9 million more in 2009.

The box office leader of the 2009 calendar year was Avatar (distributed by Twentieth Century Fox CIS, release date 17.12.2009). As of 30.12.2009 it grossed more than 1.4 billion roubles or \$46.5 million and 6.0 million admissions from 1330 screens. Moreover, by 28.03.2010 its gross grew up to 3.4 billion roubles or \$113.0 million and 13.4 million admissions and this data is still incomplete since as of the moment of this publication's release the film is still in distribution.

The highest-grossing Russian film in 2009 was The Inhabited Island (distributed by Caroprokat, release date 01.01.2009). Its gross totaled 644.2 million roubles or \$21.9 million and 3.7 million admissions.

The leader in limited release (up to 10 screens) was Antichrist (distributed by CP Classic, release date 02.07.2009). It earned 10.9 million roubles or \$0.3 million on 10 screens.

The highest per screen average in 2009 belonged to Moon 2112 (distributed by Premium Film, release date 17.09.2009). It was released on 5 screens and grossed more than 1,687,400 roubles or \$55,100 per print. Among films in wide release (more than 100 prints) Ice Age 3: Dawn of the Dinosaur (distributed by Twentieth Century Fox CIS, release date 01.07.2009) showed the highest gross per print. Each of its 1098 prints brought 1,269,900 roubles or \$40,700. Among Russian films, Room and a Half (distributed by Paradise, release date 09.04.2009) had the best per-screen average. Each of the film's three prints grossed 998,400 roubles or \$29,600.

Table 2. TOP-10: DISTRIBUTORS 2009 (01.01.09 - 30.12.09)

#	DISTRIBUTOR	MARKET SHARE	GROSS BOX OFFICE	
			RUR, MLN	\$, MLN
1	WDSSPR	26,51%	6 359,481	207,313
	<i>Including Sony</i>	15,57%	3 735,036	121,163
	<i>Including Disney</i>	10,94%	2 624,445	86,150
2	FOX	19,36%	4 644,233	147,898
3	Caro Premier + Caroprokat	16,80%	4 029,959	127,754
	<i>Including Caro Premier</i>	9,21%	2 208,889	69,474
	<i>Including Caroprokat</i>	7,53%	1 821,070	58,280
4	Central Partnership + CP Classic	15,76%	3 780,822	117,101
	<i>Including Paramount</i>	8,24%	1 975,574	60,082
	<i>Including Central Partnership</i>	7,08%	1 699,005	53,728
	<i>Including CP Classic</i>	0,42%	101,339	3,125
	<i>Including Central Partnership / Premium Film</i>	0,02%	4,905	0,166
5	UPI	7,41%	1 776,681	55,849
6	West	3,40%	815,132	27,527
7	Paradise	3,35%	804,236	24,896
8	Volga	1,61%	385,465	11,870
9	Top Film Distribution	1,31%	313,389	10,419
10	Nashe Klno	1,10%	263,076	8,899

This data includes the gross income for 2009 of the films released in 2008 or earlier

Source: Booker's Bulletin



2009		AVERAGE PER PRINT		MOVIES ON SCREENS	RELEASES 2009
ADMISSIONS, MLN	PRINTS	RUBLES	\$		
37,673	12 644	503 000	\$16 400	33	33
22,218	7 330	509 600	\$16 500	18	18
15,455	5 314	493 900	\$16 200	15	15
26,071	9 040	513 700	\$16 400	16	15
23,705	12 027	335 100	\$10 600	32	30
13,000	6 116	361 200	\$11 400	18	17
10,704	5 911	308 100	\$9 900	14	13
23,856	11 022	343 000	\$10 600	44	40
12,622	5 197	380 100	\$11 600	12	12
10,662	5 236	324 500	\$10 300	17	14
0,541	479	211 600	\$6 500	14	13
0,031	110	44 600	\$1 500	1	1
10,515	5 766	308 100	\$9 700	20	19
5,237	2 650	307 600	\$10 400	13	13
4,737	4 100	196 200	\$6 100	28	27
2,174	1 462	263 700	\$8 100	11	11
1,894	1 884	166 300	\$5 500	16	15
1,517	2 243	117 300	\$4 000	10	9

Table 3. TOP-50: THE MOST LUCRATIVE FILMS IN 2009 (01.01.09-30.12.09)

#	TITLE	DISTRIBUTOR	RELEASE DATE	PRINTS
1	Avatar *	FOX	17.12.09	1 330
2	Ice Age 3: Dawn of the Dinosaur	FOX	01.07.09	1 098
3	2012 *	WDSSPRS	12.11.09	840
4	The Inhabitant Island. Film One	Caroprokat	01.01.09	924
5	Harry Potter and the Half-Blood Prince	Caro Premier	16.07.09	919
6	Taras Bulba	CP	02.04.09	648
7	Transformers: Revenge of the Fallen	CPP	25.06.09	913
8	The Inhabitant Island. Skirmish	FOX	25.08.09	1 041
9	Twilight Saga: New Moon, The	West	19.11.09	680
10	Fast & Furious 4	UPI	09.04.09	696
11	Monsters Vs Aliens	CPP	19.03.09	757
12	Terminator 4	WDSSPRS	04.06.09	790
13	Final Destination: Death Trip 3D	Caro Premier	10.09.09	625
14	Angels & Demons	WDSSPRS	14.05.09	685
15	The Best Movie 2	WDSSPRS	22.01.09	948
16	A Christmas Carol 3D *	WDSSPRD	19.11.09	344
17	Up	WDSSPRD	28.05.09	594
18	Night at the Museum 2	FOX	21.05.09	883
19	No Love In The City	Caroprokat	05.03.09	678
20	Surrogates	WDSSPRD	24.09.09	630
21	The Book Of Masters	WDSSPRD	29.10.09	691
22	G-Force	WDSSPRD	20.08.09	481
23	District 9	WDSSPRS	13.08.09	453
24	G.I.JOE: The Rise of Cobra	CPP	06.08.09	756
25	X-Men Origins: Wolverine	FOX	29.04.09	774

BOX OFFICE AS OF 31.12.09			AVERAGE PER PRINT	
RUR, MLN	\$, MLN	ADMISSIONS, MLN	RUR	\$
1 405,486	\$46,539	5,988	1 057 600	\$35 000
1 394,353	\$44,705	8,460	1 269 900	\$40 700
1 052,023	\$36,656	6,122	1 252 400	\$43 600
644,224	\$21,920	3,716	697 200	\$23 700
595,428	\$18,578	3,897	647 900	\$20 200
575,267	\$17,218	3,784	887 800	\$26 600
567,839	\$18,235	3,754	621 900	\$20 000
553,330	\$17,622	3,452	531 500	\$16 900
534,569	\$18,613	3,401	786 100	\$27 400
479,254	\$14,187	2,899	688 600	\$20 400
456,079	\$13,250	2,969	602 500	\$17 500
446,110	\$14,622	2,756	564 700	\$18 500
435,339	\$13,976	2,209	696 500	\$22 400
435,142	\$13,607	2,456	635 200	\$19 900
420,704	\$12,889	2,682	443 800	\$13 596
378,782	\$13,189	1,696	1 101 100	\$38 339
374,935	\$12,025	2,318	631 200	\$20 244
347,223	\$10,919	2,311	393 200	\$12 366
326,188	\$9,003	1,928	481 100	\$13 279
323,314	\$10,777	1,888	513 200	\$17 107
316,436	\$10,848	2,245	457 900	\$15 699
312,120	\$9,778	1,914	648 900	\$20 329
300,843	\$9,203	1,805	664 100	\$20 315
285,311	\$9,165	1,781	377 400	\$12 123
253,380	\$7,620	1,576	327 400	\$9 846

Table 3. TOP-50: THE MOST LUCRATIVE FILMS IN 2009 (01.01.09-30.12.09)

#	TITLE	DISTRIBUTOR	RELEASE DATE	PRINTS
26	Yes Man	Caro Premier	15.01.09	474
27	Bedtime Stories	WDSSPRD	01.01.09	455
28	Cloudy with a Chance of Meatballs	WDSSPRS	22.10.09	438
29	Proposal, The	WDSSPRD	18.06.09	409
30	Crank: High Voltage	CP	16.04.09	442
31	The Inhabitant Island. Skirmish	Caroprokat	23.04.09	863
32	Knowing	Paradise	19.03.09	479
33	Ugly Truth, The	WDSSPRS	17.09.09	400
34	Watchmen	CPP	05.03.09	585
35	IngLOURIOUS BASTERDS	UPI	20.08.09	409
36	Public Enemies	UPI	23.07.09	415
37	Hang Over	Caro Premier	11.06.09	343
38	The Curious Case Of Benjamin Button	Caro Premier	05.02.09	407
39	9	UPI	10.09.09	531
40	Old Dogs *	WDSSPRD	03.12.09	330
41	Tsar *	Nashe Kino	04.11.09	485
42	Shopaholic	WDSSPRD	12.02.09	415
43	Star Trek	CPP	07.05.09	562
44	Lopukhi. Episode One	Paradise	13.08.09	531
45	Valkyrie	FOX	29.01.09	520
46	Bride At Any Cost	CP	17.09.09	588
47	Bride Wars	FOX	26.02.09	484
48	Marley & Me	FOX	12.03.09	517
49	Slumdog Millionaire	Volga	12.02.09	166
50	Pink Panther 2	WDSSPRS	19.02.09	550

\* Still in release

Source: Booker's Bulletin

BOX OFFICE AS OF 31.12.09			AVERAGE PER PRINT	
RUR, MLN	\$, MLN	ADMISSIONS, MLN	RUR	\$
252,849	\$8,012	1,466	533 400	\$16 902
252,493	\$8,591	1,475	554 900	\$18 882
250,822	\$8,602	1,432	572 700	\$19 638
235,416	\$7,562	1,343	575 600	\$18 490
216,538	\$6,473	1,329	489 900	\$14 646
204,885	\$6,015	1,201	237 400	\$6 970
203,566	\$5,914	1,116	425 000	\$12 347
198,566	\$6,487	1,123	496 400	\$16 217
196,184	\$5,415	1,197	335 400	\$9 256
191,857	\$6,011	1,023	469 100	\$14 696
175,998	\$5,663	0,973	424 100	\$13 645
163,061	\$5,272	0,914	475 400	\$15 370
158,764	\$4,409	0,864	390 100	\$10 833
156,100	\$5,011	1,000	294 000	\$9 437
155,144	\$5,339	0,871	470 100	\$16 178
152,621	\$5,221	0,803	314 700	\$10 766
151,037	\$4,215	0,891	363 900	\$10 158
135,014	\$4,105	0,810	240 200	\$7 304
132,273	\$4,046	0,858	249 100	\$7 620
130,413	\$3,926	0,752	250 800	\$7 550
128,189	\$4,188	0,792	218 000	\$7 122
127,280	\$3,561	0,764	263 000	\$7 358
124,750	\$3,552	0,759	241 300	\$6 871
121,199	\$3,383	0,639	730 100	\$20 377
119,548	\$3,282	0,713	217 400	\$5 966

Table 4. TOP-25: THE HIGHEST GROSSING DOMESTIC FILMS IN 2009

#	MOVIE TITLE	DISTRIBUTOR	RELEASE DATE	PRINTS
1	The Inhabitant Island. Film One	Caroprokat	01.01.09	924
2	Taras Bulba	CP	02.04.09	648
3	High Security Vacation	FOX	25.08.09	1041
4	The Best Movie 2	WDSSPRS	22.01.09	948
5	No Love In The City	Caroprokat	05.03.09	678
6	The Book Of Masters	WDSSPRD	29.10.09	691
7	The Inhabitant Island. Skirmish	Caroprokat	23.04.09	863
8	Tsar *	Nashe Kino	04.11.09	485
9	Lopukhi. Episode One	Paradise	13.08.09	531
10	Bride At Any Cost	CP	17.09.09	588
11	Hooked	Caroprokat	26.11.09	607
12	Julia	Caroprokat	19.02.09	420
13	The Return Of The Musketeers	CP	05.02.09	505
14	First Love	WDSSPRS	05.03.09	524
15	Pick-up without Rules *	Cascade Film	03.12.09	402
16	The Taming Of The Shrews	Caroprokat	29.10.09	411
17	Interceptor	CP	08.10.09	458
18	Antikiller 3 *	Leopolis	03.12.09	523
19	Laskoviy May	Caroprokat	01.10.09	493
20	By The Will Of Genghis Khan	Caroprokat	12.03.09	277
21	Bury Me Behind the Baseboard *	Argument Kino	03.12.09	99
22	O, LuckyMan!	Nashe Kino	01.10.09	300
23	The Way	Nashe Kino	21.05.09	339
24	To The Sea	CP	08.01.09	191
25	NewsMakers	Cinema without Frontiers	07.05.09	338

\* Still in release

Source: Booker's Bulletin

BOX OFFICE AS OF 30.12.09.			AVERAGE PER PRINT	
RUR, MLN	\$, MLN	ADMISSIONS, MLN	RUR	\$
644,224	\$21,920	3,716	697 200	\$23 700
575,267	\$17,218	3,784	887 800	\$26 600
553,330	\$17,622	3,452	531 500	\$16 900
420,704	\$12,889	2,682	443 800	\$13 600
326,188	\$9,003	1,928	481 100	\$13 300
316,436	\$10,848	2,245	457 900	\$15 700
204,885	\$6,015	1,201	237 400	\$7 000
152,621	\$5,221	0,803	314 700	\$10 800
132,273	\$4,046	0,858	249 100	\$7 600
128,189	\$4,188	0,792	218 000	\$7 100
106,721	\$3,707	0,641	175 800	\$6 100
105,424	\$2,894	0,647	251 000	\$6 900
91,832	\$2,550	0,637	181 800	\$5 100
63,463	\$1,752	0,459	121 100	\$3 300
62,297	\$2,144	0,387	155 000	\$5 300
61,534	\$2,109	0,373	149 700	\$5 100
55,844	\$1,893	0,358	121 900	\$4 100
54,391	\$1,872	0,308	104 000	\$3 600
48,738	\$1,625	0,302	98 900	\$3 300
42,303	\$1,205	0,270	152 700	\$4 300
31,133	\$1,071	0,154	314 500	\$10 800
28,851	\$0,962	0,198	96 200	\$3 200
24,433	\$0,768	0,148	72 100	\$2 300
22,286	\$0,758	0,167	116 700	\$4 000
21,982	\$0,668	0,229	65 000	\$2 000

Table 5. TOP-25: THE HIGHEST GROSSING FOREIGN FILMS IN 2009

#	TITLE	DISTRIBUTOR	RELEASE DATE	PRINTS
1	Avatar *	FOX	17.12.09	1329
2	Ice Age 3: Dawn of the Dinosaurus	FOX	01.07.09	1098
3	2012 *	WDSSPRS	12.11.09	840
4	Harry Potter and the Half-Blood Prince	Caro Premier	16.07.09	919
5	Transformers: Revenge of the Fallen	CPP	25.06.09	913
6	Twilight Saga: New Moon, The	West	19.11.09	680
7	Fast & Furious 4	UPI	09.04.09	696
8	Monsters Vs Aliens	CPP	19.03.09	757
9	Terminator 4	WDSSPRS	04.06.09	790
10	Final Destination: Death Trip 3D	Caro Premier	10.09.09	625
11	Angels & Demons	WDSSPRS	14.05.09	685
12	A Christmas Carol 3D *	WDSSPRD	19.11.09	344
13	Up	WDSSPRD	28.05.09	594
14	Night at the Museum 2	FOX	21.05.09	883
15	Surrogates	WDSSPRD	24.09.09	630
16	G-Force	WDSSPRD	20.08.09	481
17	District 9	WDSSPRS	13.08.09	453
18	G.I.JOE: The Rise of Cobra	CPP	06.08.09	756
19	X-Men Origins: Wolverine	FOX	29.04.09	774
20	Yes Man	Caro Premier	15.01.09	474
21	Bedtime Stories	WDSSPRD	01.01.09	455
22	Cloudy with a Chance of Meatballs	WDSSPRS	22.10.09	438
23	Proposal, The	WDSSPRD	18.06.09	409
24	Crank: High Voltage	CP	16.04.09	442
25	Knowing	Paradise	19.03.09	479

\* Still in release

Source: Booker's Bulletin



BOX OFFICE AS OF 30.12.09.			AVERAGE PER PRINT	
RUR, MLN	\$, MLN	ADMISSIONS, MLN	RUR	\$
1 405,486	\$46,539	5,988	1 057 600	\$35 000
1 394,353	\$44,705	8,460	1 269 900	\$40 700
1 052,023	\$36,656	6,122	1 252 400	\$43 600
595,428	\$18,578	3,897	647 900	\$20 200
567,839	\$18,235	3,754	621 900	\$20 000
534,569	\$18,613	3,401	786 100	\$27 400
479,254	\$14,187	2,899	688 600	\$20 400
456,079	\$13,250	2,969	602 500	\$17 500
446,110	\$14,622	2,756	564 700	\$18 500
435,339	\$13,976	2,209	696 500	\$22 400
435,142	\$13,607	2,456	635 200	\$19 900
378,782	\$13,189	1,696	1 101 100	\$38 300
374,935	\$12,029	2,318	631 200	\$20 200
347,223	\$10,919	2,311	393 200	\$12 400
323,314	\$10,777	1,888	513 200	\$17 100
312,120	\$9,778	1,914	648 900	\$20 300
300,843	\$9,203	1,805	664 100	\$20 300
285,311	\$9,165	1,781	377 400	\$12 100
253,380	\$7,620	1,576	327 400	\$9 800
252,849	\$8,012	1,466	533 400	\$16 900
252,493	\$8,591	1,475	554 900	\$18 900
250,822	\$8,602	1,432	572 700	\$19 600
235,416	\$7,562	1,343	575 600	\$18 500
216,538	\$6,473	1,329	489 900	\$14 600
203,566	\$5,914	1,116	425 000	\$12 300

Table 6. TOP-25: THE BEST GROSS PER PRINT IN 2009

#	TITLE	DISTRIBUTOR	RELEASE DATE	PRINTS
1	Moon	Premium Film	17.09.09	5
2	French Film	Russian Report	28.05.09	2
3	Ice Age 3: Dawn of the Dinosaurus	FOX	01.07.09	1098
4	2012*	WDSSPRS	12.11.09	840
5	A Christmas Carol 3D*	WDSSPRD	19.11.09	344
6	Antichrist	CP Classic	02.07.09	10
7	Choke	Cinema without Frontiers	15.01.09	6
8	Avatar*	FOX	17.12.09	1329
9	Room and a Half	Padarise	09.04.09	3
10	Taras Bulba	CP	02.04.09	648
11	Little Ashes*	Premium Film	12.11.09	2
12	Twilight Saga: New Moon, The	West	19.11.09	680
13	\$9,99	Russian Report	13.08.09	1
14	My Bloody Valentine 3D	CP	09.04.09	96
15	Slumdog Millionaire	Volga	12.02.09	166
16	The Inhabitant Island. Film One	Caroprokat	01.01.09	924
17	Final Destination: Death Trip 3D	Caro Premier	10.09.09	625
18	Fast & Furious 4	UPI	09.04.09	696
19	La Belle Personne	Russian Report	30.04.09	2
20	Genova	Russian Report	02.04.09	2
21	Okuribito*	Russian Report	09.07.09	2
22	Ce Soir, Dors Chez Toi*	Russian Report	01.01.09	5
23	District 9	WDSSPRS	13.08.09	453
24	G-Force	WDSSPRD	20.08.09	481
25	Harry Potter and the Half-Blood Prince	Caro Premier	16.07.09	919

\* Still in release

Source: Booker's Bulletin

BOX OFFICE AS OF 30.12.09.			AVERAGE PER PRINT	
RUR, MLN	\$, MLN	ADMISSIONS, MLN	RUR	\$
8,437	\$0,276	0,039	1 687 400	\$55 100
3,307	\$0,106	0,015	1 653 600	\$53 000
1 394,353	\$44,705	8,460	1 269 900	\$40 700
1 052,023	\$36,656	6,122	1 252 400	\$43 600
378,782	\$13,189	1,696	1 101 100	\$38 300
10,868	\$0,348	0,049	1 086 800	\$34 800
6,520	\$0,207	0,032	1 086 700	\$34 400
1 405,486	\$46,539	5,988	1 057 600	\$35 000
2,995	\$0,089	0,016	998 400	\$29 600
575,267	\$17,218	3,784	887 800	\$26 600
1,584	\$0,055	0,009	791 800	\$27 600
534,569	\$18,613	3,401	786 100	\$27 400
0,782	\$0,024	0,005	781 700	\$23 900
70,466	\$2,086	0,326	734 000	\$21 700
121,199	\$3,383	0,639	730 100	\$20 400
644,224	\$21,920	3,716	697 200	\$23 700
435,339	\$13,976	2,209	696 500	\$22 400
479,254	\$14,187	2,899	688 600	\$20 400
1,371	\$0,041	0,008	685 300	\$20 600
1,370	\$0,041	0,008	685 100	\$20 500
1,359	\$0,043	0,008	679 300	\$21 400
3,368	\$0,115	0,019	673 600	\$22 900
300,843	\$9,203	1,805	664 100	\$20 300
312,120	\$9,778	1,914	648 900	\$20 300
595,428	\$18,578	3,897	647 900	\$20 200

Table 7. **TOP-10: THE HIGHEST NUMBER OF PRINTS IN RUSSIA IN 2009**

#	TITLE	DISTRIBUTOR	RELEASE DATE	PRINTS
1	Avatar *	FOX	17.12.09	1 329
2	Ice Age 3: Dawn of the Dinosaurus	FOX	01.07.09	1 098
3	High Security Vacation	FOX	25.08.09	1 041
4	The Best Movie 2	WDSSPRS	22.01.09	948
5	The Inhabitant Island. Film One	Caroprokat	01.01.09	924
6	Harry Potter and the Half-Blood Prince	Caro Premier	16.07.09	919
7	Transformers: Revenge of the Fallen	CPP	25.06.09	913
8	Night at the Museum 2	FOX	21.05.09	883
9	The Inhabitant Island. Skirmish	Caro Premier	23.04.09	863
10	2012 *	WDSSPRS	12.11.09	840

\* Still in release

Source: Booker's Bulletin

BOX OFFICE AS OF 30.12.09.			AVERAGE PER PRINT	
RUR, MLN	\$, MLN	ADMISSIONS, MLN	RUR	\$
1 405,486	\$46,539	5,988	1 057 600	\$35 000
1 394,353	\$44,705	8,460	1 269 900	\$40 700
553,330	\$17,622	3,452	531 500	\$16 900
420,704	\$12,889	2,682	443 800	\$13 600
644,224	\$21,920	3,716	697 200	\$23 700
595,428	\$18,578	3,897	647 900	\$20 200
567,839	\$18,235	3,754	621 900	\$20 000
347,223	\$10,919	2,311	393 200	\$12 400
204,885	\$6,015	1,201	237 400	\$7 000
1 052,023	\$36,656	6,122	1 252 400	\$43 600

## CINEMA EXHIBITION MARKET IN RUSSIA

As of 31 December 2009 Russia has 2 102 modern screens in 792 cinema complexes (with an average of 2.7 screens per complex). There are now 353 digital complexes with 351 equipped to show 3D exhibitions.

61 cinemas (255 screens) were opened in the country over the course of last year, a third lower than a year earlier; 2008 remains the most successful in the development of modern exhibition, while the 2009 crisis had a major impact on market growth. At the same time the number of closures fell for the year — just 40 screens in 23 complexes (these were predominantly one- and two-screen venues).

There are now 309 cities with modern cinemas in operation (in all Russian cities with over 250 000 residents and 23% of lesser-populated centres).

Digital cinemas are already operating in 107 cities around the country and not only in the major centres; towns with populations under 250 000 and even under 100 000 residents now boast such facilities.

Market growth in modern screens for 2009 constituted 11.5%, almost half that of a year ago. The crisis saw a drop not only in new screen openings but also in the share of new screens in retail and entertainment centres: last year 63% of all the country's new screens appeared in retail and entertainment centres (compared with 80% in 2008). Nevertheless, the total share of screens in retail complexes continues to grow and constitutes over 53% for the year. The share of screens in multiplexes grew over the last year by 5% and at the end of 2009 amounted to 25.5%. As before, they are nearly all located within retail centres.

The top five Russian exhibitors remained unchanged over the last

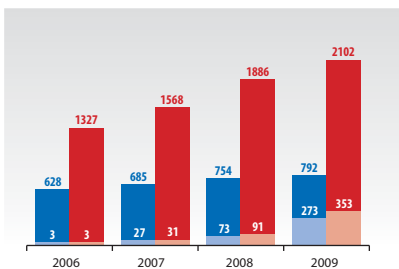


Chart 2. MODERN CINEMAS IN RUSSIA

- Cinemas
- Screens
- Digital cinemas
- Digital screens

Source: Nevafilm Research

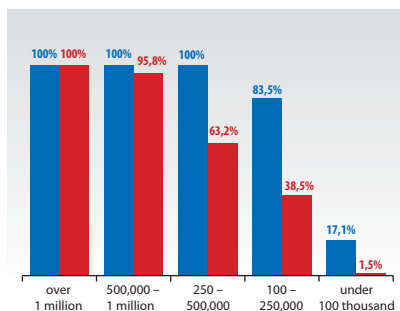


Chart 3. SHARE OF RUSSIAN CITIES (BY POPULATION), WITH MODERN CINEMAS (AS OF 31.12.2009)

- Modern cinemas
- Digital cinemas

Source: Nevafilm Research

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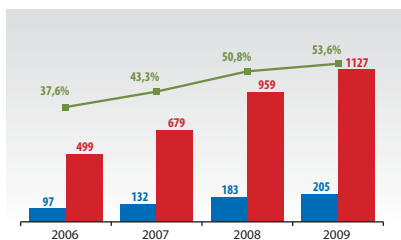


Chart 4. **CINEMAS AND SCREENS IN RETAIL AND ENTERTAINMENT CENTRES**

- Cinemas
- Screens
- Share of screens in retail and entertainment centres

Source: Nevafilm Research

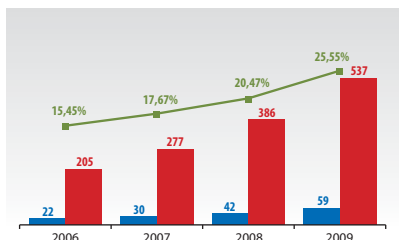


Chart 5. **MULTIPLEXES (8+ SCREENS) IN RUSSIA**

- Multiplexes
- Screens in Multiplexes
- Share of screens in multiplexes

Source: Nevafilm Research

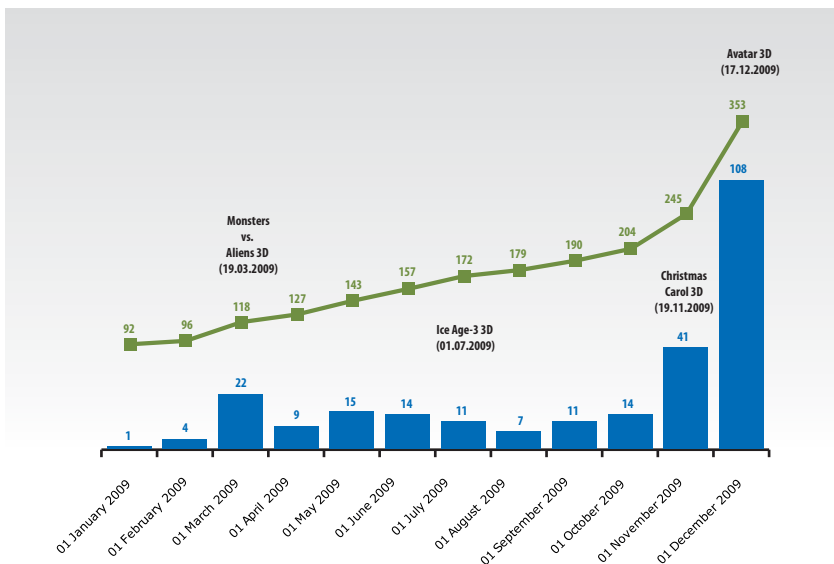


Chart 6. **DYNAMIC OF THE TOTAL NUMBER AND NEW OPENINGS OF DIGITAL SCREENS IN RUSSIA**

- no. of new digital screens
- no. of digital screens

Source: Nevafilm Research



Table 8. **TOP-10: MAJOR CINEMA NETWORK OPERATORS IN RUSSIA**  
 (AS OF 31 DECEMBER 2009) \*

2008 RANK	2009 RANK	NETWORK OPERATOR	NO. OF CINEMAS	NO. OF SCREENS	MARKET SHARE BY NO. OF SCREENS	HEAD OFFICE
1	1	Karo Film	33	167	7.9%	Moscow
2	2	Cinema Park	15	126	6.0%	Moscow
3	3	Kinomax	24	100	4.8%	Moscow
4	4	Kronverk Cinema	15	97	4.6%	Saint Petersburg
6	5	KinoStar	6	74	3.5%	Moscow
9	6	Luxor	13	65	3.1%	Moscow
5	7	Formula Kino	12	65	3.1%	Moscow
7	8	Premier-Zal	40	54	2.6%	Yekaterinburg
10	9	Paradise	8	42	2.0%	Moscow
11	10	InvestKinoProject	6	41	2.0%	Moscow
<b>Total for these operators</b>			<b>172</b>	<b>831</b>	<b>39.5%</b>	
<b>Overall in Russia</b>			<b>792</b>	<b>2,102</b>	<b>100.0%</b>	

\* Including franchises and repertory cinemas

Source: Nevafilm Research

 Table 9. **DISTRIBUTION OF MODERN CINEMAS BY FEDERAL DISTRICTS OF RUSSIA**  
 (AS OF 31 DECEMBER 2009)

DISTRICT	NO. OF CINEMAS	NO. OF SCREENS	NUMBER OF DIGITAL CINEMAS	NUMBER OF DIGITAL SCREENS	MARKET SHARE BY TOTAL NO. OF SCREENS
Greater Moscow	111	471	53	85	22%
Volga Federal District	131	373	46	59	18%
Central Federal District (not including Greater Moscow)	120	251	37	40	12%
Siberian Federal District	111	244	32	37	12%
Urals Federal District	89	210	20	30	10%
Saint Petersburg	42	197	23	27	9%
Southern Federal District	61	161	24	32	8%
Far-Eastern Federal District	56	82	22	25	4%
North-West Federal District (not including Saint Petersburg)	45	70	11	11	3%
North Caucasus Federal District	26	43	5	7	2%
<b>Overall in Russia</b>	<b>792</b>	<b>2,102</b>	<b>273</b>	<b>353</b>	<b>100%</b>

Source: Nevafilm Research

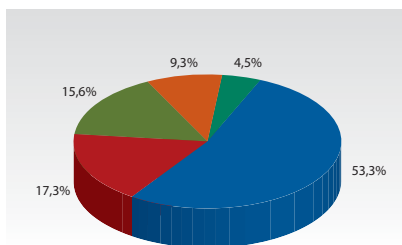


Chart 7. **DISTRIBUTION OF NUMBER OF DIGITAL PROJECTORS IN COMMERCIAL SCREENS IN RUSSIA (AS OF 31.12.2009)**

- Christie
- Barco
- Cinemeccanica
- NEC
- Kinoton

Source: Nevafilm Research

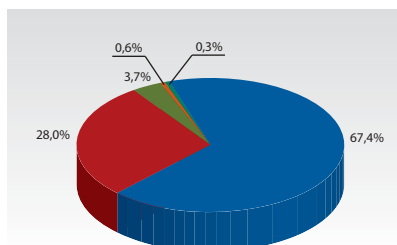


Chart 8. **DISTRIBUTION OF NUMBER OF DIGITAL CINEMA SERVERS IN COMMERCIAL SCREENS IN RUSSIA (AS OF 31.12.2009)**

- Dolby
- DoReMi
- GDC SA-2100A
- Kodak
- QUBE QCPD

Source: Nevafilm Research

year. Karo Film, Cinema Park, Kinomax, Kronwerk Cinema and KinoStar together manage 27% of state-of-the-art cinema facilities and 39.5% of the country's screens are in the hands of the ten largest movie networks.

In early 2010 a new Federal district appeared in the Russian Federation; in the 2009 report we highlight it in its own line in the district ratings (the North Caucasus Federal District currently occupies last place in terms of the number of modern cinema screens). Of course the traditional leader of the Russian regions is the Moscow market, followed by the Volga Federal District.

By the end of 2009 there were 353 digital screens operating commercially in Russia: in 273 cinemas and 103 Russian cities. The main reason for the growth in the digital screen market was the plethora of 3D films on release (a

total of 19 in 2009), where each major 3D-release stimulating a wave of new screen openings: the most important wave preceded the December launch of Avatar (which saw the opening of over 100 screens). And yet the question remains: will the spread of digital technology continue at the same rate in 2010 despite the ever-growing volume of 3D releases?

The majority of digital screens in Russia belong to federal cinema networks (40%), although independent cinemas are not far behind (at the end of 2009, independent players accounted for 36% of digital screens). The regional networks are more cautious about introducing new exhibition technology: their share of the digital distribution market is less than 10%.

Taking into account all market players, only 17% of screens have been equipped

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projectors and servers  
Distribution of  
alternative content  
Research on the  
Digital Cinema Market

Table 10. **DISTRIBUTION OF DIGITAL SCREENS IN RUSSIA BY CINEMA OPERATOR TYPE (AS OF DECEMBER 31, 2009)**

OPERATOR TYPE	TOTAL OPERATORS IN RUSSIA	TOTAL OPERATORS OF DIGITAL SCREENS	NUMBER OF DIGITAL CINEMAS	NUMBER OF DIGITAL SCREENS	SHARE OF DIGITAL CINEMAS	SHARE OF DIGITAL SCREENS	MARKET SHARE BROKEN DOWN BY DIGITAL SCREENS
Federal networks	18	15	94	142	53.7%	15.7%	40.2%
Regional networks	8	7	23	32	27.7%	14.6%	9.1%
Local networks	52	26	44	51	29.5%	15.7%	14.4%
Independent cinemas	385	112	112	128	29.1%	19.5%	36.3%
<b>Overall in Russia</b>	<b>463</b>	<b>160</b>	<b>273</b>	<b>353</b>	<b>34.5%</b>	<b>16.8%</b>	<b>100.0%</b>

Source: Nevafilm Research

Table 11. **TOP-10: MAJOR DIGITAL CINEMA OPERATORS (AS OF 31 DECEMBER 2009)**

RANK	NETWORK OPERATOR	NO. OF DIGITAL CINEMAS	NO. OF DIGITAL SCREENS	MARKET SHARE BY NO. OF DIGITAL SCREENS	HEAD OFFICE
1	Cinema Park	15	38	10.8%	Moscow
2	Luxor	13	22	6.2%	Moscow
3	Caro Film	16	18	5.1%	Moscow
4	Formula Kino	10	17	4.8%	Moscow
5	Rising Star Media	6	14	4.0%	Moscow
6	Paradise	6	8	2.3%	Moscow
7	Kinomax	7	7	2.0%	Moscow
8	Kronverk Cinema	7	7	2.0%	Saint Petersburg
9	Monitor	6	7	2.0%	Krasnodar
10	Illuzion	5	6	1.7%	Vladivostok
<b>Total for these operators</b>		<b>91</b>	<b>144</b>	<b>40.8%</b>	
<b>Overall in Russia</b>		<b>273</b>	<b>353</b>	<b>100.0%</b>	

\* Including franchises and repertory cinemas

Source: Nevafilm Research

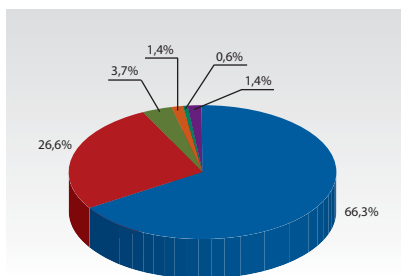


Chart 9. DISTRIBUTION OF THE NUMBER OF DIGITAL 3D-SYSTEMS IN COMMERCIAL SCREENS IN RUSSIA (AS OF 31.12.2009)

- Dolby 3D
- XpanD 3D
- RealD
- Master Image 3D
- IMAX
- others

Source: Nevafilm Research

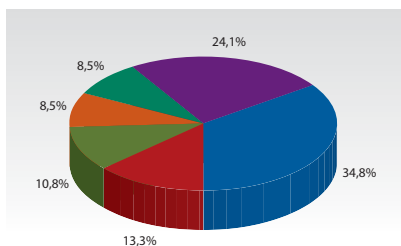


Chart 10. RATING OF DIGITAL EQUIPMENT INTEGRATORS IN COMMERCIAL SCREENS IN RUSSIA (AS OF 31.12.2009)

- Nevafilm
- Kinoproject
- Cinemeccanica
- ACK
- Asia Cinema
- Others (15 companies)

Source: Nevafilm Research

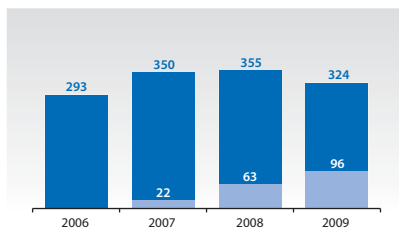


Chart 11. NUMBER OF FILM RELEASED IN RUSSIAN FILM DISTRIBUTION

- Total films
- Digital releases

Source: Russian Film Business Today Magazine, Nevafilm Research

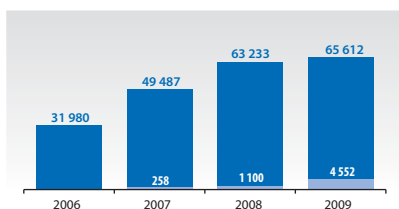


Chart 12. NUMBER OF FILM PRINTS IN DISTRIBUTION IN RUSSIA

- total prints in distribution
- digital prints in distribution

Source: Russian Film Business Today Magazine, Nevafilm Research

with digital exhibition technology. The federal networks have equipped more than half of their cinemas, while other market players have equipped less than 30%. Some of the federal and regional networks do not yet have any digital screens. This indicates that there are still prospects for growth in the Russian digital exhibition market.

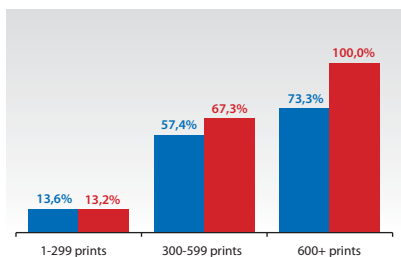


Chart 13. **DIGITAL SHARE OF WIDE- AND NARROW-RELEASE FILMS**

2008  
2009

Source: Russian Film Business Today Magazine, Nevafilm Research

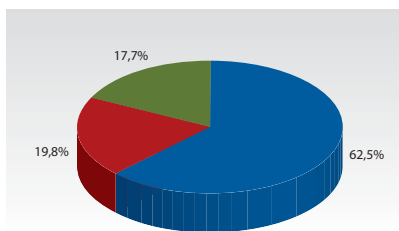


Chart 14. **DIGITAL RELEASES IN RUSSIA BY COUNTRY OF ORIGIN, 2009**

Hollywood  
Russia  
Europe and independent USA

Source: Russian Film Business Today Magazine, imdb.com, Nevafilm Research

Cinema Park and Luxor lead the way on the digital exhibition market. However, in 2009 other major exhibitors have also been actively installing digital equipment.

In Russia, the most popular digital exhibition systems are Christie projectors (53% of the market), Dolby Digital Cinema servers (67%) and Dolby 3D Digital Cinema systems (66%). The leading digital exhibition equipment integrator is Nevafilm Cinemas (35% of digital screens).

Along with the increasing number of digital screens in Russia, the number of digital releases is growing too: last cinema distribution year<sup>1</sup> as many as 96 films were released in digital format, including 19 produced in Russia. 15 3D films were released in Russia in 2009 cinema distribution year.

The number of digital copies is also on the increase: last year digital accounted for 7% of all prints in distribution (compared with 1.7% in 2008).

Most digital releases are Hollywood films and 3D pictures, most of which are wide releases (all pictures with a total circulation of over 600 prints and 67% of films with 300 - 600 prints in circulation). Surprisingly, of 32 pictures with a narrower release, 15 appeared in digital only (including 6 Nevafilm Emotion alternative programmes), and 8 of these were 3D films. This suggests that independent distributors are finding it harder and harder to break into the digital exhibition market.

<sup>1</sup> The cinema distribution year differs from the calendar year. According to Russian Film Business Today it includes movies released in Russian cinemas from 1 December to 30 November.

национальная кинокомиссия России  
la commission nationale du Russie  
nazionalna film komisija Ruslands  
national film commission of Russia

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The National Film Commission of Russia starts its operations on the international market in 2010. It has been established as a non-commercial partnership whose objectives are to stimulate movie production in regions of the Russian Federation, to provide the additional infrastructure for a national movie industry and to facilitate the enhancement of Russia as an attractive shooting location. The Ministry of Culture of the Russian Federation supports the initiative that has led to the creation of the Commission.

The Commission's operations will focus on the following fundamental tasks:

- The creation and development of a network of regional movie commissions throughout the Russian Federation.
- The provision of additional competitive benefits for the Russian Regions to improve their appeal as potential shooting locations among foreign moviemakers.
- The overseas promotion of the Russian regions, and inducing foreign producers to come and work there.
- Increasing the number of movies produced in the Russian regions, including co-operation with foreign producers and film institutes.

The National Film Commission has been jointly founded by the administrative organs of the many different territorial units that together constitute the Russian Federation, as well as by specialized or state movie organizations that have been authorized to perform the functions of a film commission or which do so on a voluntary basis.

The associated partners of the National Film Commission of Russia are movie studios, movie production and movie services companies as well as other service providers. All

these parties share common interests such as getting foreign movie shooting teams to come and work in the Russian regions, overseas promotion of the regions, and projecting a positive image that will attract more tourists and create further employment opportunities.

At the present time, leading Russian movie studios, movie production companies and regional movie industry organizations have confirmed their interest in the creation of a national film commission and the prospects of their becoming a part of it.

The first meeting of the founders and associated partners of the National Film Commission will be held in Moscow in June 2010, under the auspices of the business program of the Moscow International Film Festival, which is known as the MIFF Business Square.

The organizing committee of the National Film Commission has already been active for a year in the following areas:

- Supporting constituent bodies of the Russian Federation in the process of establishing and organizing the work of regional film commissions.
- Promoting the movie production potential of the Russian regions in an international arena.
- Providing information and organizational support to international moviemakers planning to shoot movies in Russia.
- Constructing a comprehensive database of nationwide shooting locations.  
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STRATEGIC PARTNERS



# VIDEODISTRIBUTION AND TELEVISION

*Kiril Tabachenko, Metropolitan ERA*

*Irina Poluehtova, Video International, Sociological Research Department*

*Ilya Tsarkov, Video International, Sociological Research Department*

The world financial crisis has influenced the Russian video market as well as many other business fields. By the beginning of 2009 DVD and Blu-ray distributors have faced a lot of problems, the main of which is the recession of sales. Many companies were forced to implement staff reduction or lowering of salaries as well as to revise their plans and optimize operation. Retail companies have become more cautious in their buying, cut down on orders and laid more emphasis on products that can quickly pay off. Niche and catalogue releases were the first to suffer from this and so, correspondingly, were the companies that produce them. For instance, anime distributors had to reduce drastically the number of disks released. Some of them cut their releases in half and some released new disks with several months' intervals. In the

spring of 2009 the West Video company which is the Russian distributor of such international hit as Twilight, temporally suspended releasing its films on DVD and Blu-ray. And Nastroyenie Video that had released mostly cult and art house films went out of business altogether. At the same time, the main problem many market players faced in 2009 were the defaults and arrears of clients and retail networks where delays could go up to more than 6 months.

However, despite these difficulties there were no mass closings or bankruptcies of video distributors and major retail chains. The above mentioned West Video company resumes its DVD and Blu-ray releases in February 2010, and Nastroyenie Video's film package went to another distributor. In 2009 a new major player has appeared at Russian video market. It was the Noviy Disk company that had dealt in production and distribution of computer software, games and educational programs for more than 10 years. The company's dealer network spreads over more than 150 cities in Russia, CIS countries and the Baltic states. Noviy Disk has been releasing several dozens of disks a month, apart from the Nastroyenie Video package. Also in 2009 the young film distributor Volga has begun its own DVD releases, while Walt Disney Company CIS has started to release Disney products that had been released by Videoservis before.

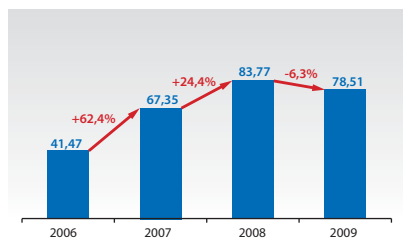


Chart 1. DVD SALES DYNAMIC (TITLES, MLN)

Source: Videomagazine



Table 1. TOP-10: DVD-SALES 2009

	FILM	COUNTRY	DISTRIBUTOR
1	Taras Bulba	Russia	CP Digital
2	Twilight	USA	West Video
3	Angels and Demons	USA	Videoservis
4	Ice Age: Dawn of the Dinosaurs	USA	Twentieth Century Fox CIS
5	Hipsters	Russia	CP Digital
6	X-Men Origins: Wolverine	USA	Twentieth Century Fox CIS
7	Night at the Museum 2	USA	Twentieth Century Fox CIS
8	Maximum Security Vacation	Russia	Flagman Trade
9	Australia	USA	Twentieth Century Fox CIS
10	The Inhabited Island: Film one	Russia	CP Digital

Source: Videomagazine

According to Videomagazine information 78.51 million license DVDs were sold on the Russian market in 2009. This figure is 5.26 million less than the record-breaking figure for 2008 (83.77 million disks), but it is still 11.16 million more than the figure for 2007 (67.35 million) and 36.77 million more compared to 2006 (41.47 million). Though the rapid upsurge of the recent years has stopped and even went reverse, the sales didn't return to 2006/2007 figures even in the time of the economic crisis. Moreover, four Russian films made it to the Top-10 of 2009 DVD sales. It is worth noting that the same four films became the box office leaders among Russian films.

The Blu-ray situation in Russia underwent major changes in 2009. At the end of 2008 such companies as Twentieth Century Fox CIS, Universal Pictures Rus, CP Digital, Paradise Video and West Video began releasing films in the new format. In 2009 they were joined by Soyuz Video, Walt Disney Company CIS and more than five other companies.

After releasing only several films, in February 2009 Twentieth Century

Fox CIS lowered retail prices to 1,000 rubles for a new release and 500 rubles for a catalogue release. Prior to that an average price for a Blu-ray disk was 1,500 rubles (~\$50). In the spring of 2009 Fox initiated promotional campaign "3 Blu-ray disks for the price of 2", so that 3 new releases cost 2,000 rubles (~\$66.7) or 670 rubles (~\$22.3) per disk and three disks from the catalogue cost 1,000 rubles (~\$33) or 335 rubles (~\$11.2) per disk. In the first half of the year only single companies followed the example, but in the autumn most distributors finally revised prices for their BD-releases. Many disks for a price of 500-700 rubles (~\$16.7-23.3) per disk appeared in retail stores and there even were some for price of 300-400 rubles (~\$10-13.3) per disk. In 2009 prices for the new format went down not only for customers but for distributors as well, since Blu-ray production became less expensive. Along with TV-sets, BD-players became cheaper and there appeared affordable models for 6,000 rubles (~\$200).

Nevertheless, in 2009 Blu-ray could neither achieve a big market share, nor compensate for the falling DVD sales.

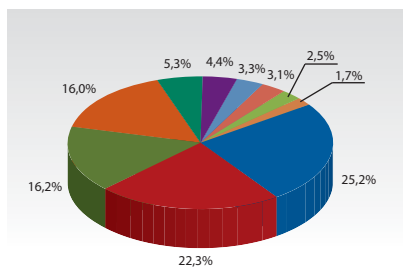


Chart 2. DVD DISTRIBUTORS SHARE IN THE RUSSIAN VIDEO MARKET IN 2009

- Universal Pictures Rus
- CP Digital
- Videoservis
- Twentieth Century Fox CIS
- Flagman Trade
- Walt Disney Company CIS
- West Video
- Paradise Video
- Misteriya Zvuka
- Soyuz Video

Source: Videomagazine

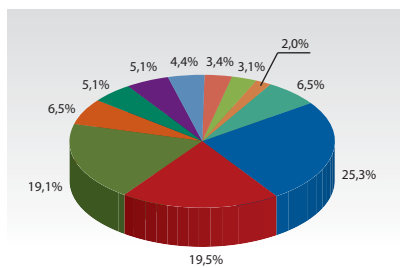


Chart 3. DISTRIBUTORS SHARE IN THE QUANTITY OF BLU-RAY RELEASES IN 2009

- Universal Pictures Rus
- Videoservis
- Twentieth Century Fox CIS
- CP Digital
- Walt Disney Company CIS
- Soyuz Video
- Paradise Video
- Laser-Video Multimedia
- Monolith
- Misteriya Zvuka
- Others

Source: Booker's Bulletin

There is no promotion of the format itself apart from the advertising of equipment manufacturers and disks distributors. So far as the difference between DVD and Blu-ray format is not as evident as the difference between VHS and DVD, while at the same time the average price for a Blu-ray disk is 2-3 times higher, it is not surprising that customers are not impelled to switching to the new format. Moreover, unlike the process of transition from VHS to DVD when only a new player was required, a new TV-set has to be bought to suit the Blu-ray format. Even the purchase of a Full HD or HD Ready screen does not guarantee Blu-ray sales since TV broadcasting in Russia still operates in standard definition (SD) and for the most viewers

a DVD-quality picture will suffice. In addition, in 1990s DVD format didn't have rivals represented by broadband Internet and free file sharing while DVD-players didn't have alternatives such as mediaplayers sold in all the big stores alongside BD-players.

Since the emergence of the format on the market around 500 Blu-ray disks have been released. In 2009 a little less than 300 disks were released on the Russian market, 2.5 times more than in 2008. More than half of these BD-releases was released by three distributors of major players – Videoservis (Sony), Twentieth Century Fox CIS (Fox) and Universal Pictures Rus (Universal, Warner/New Line, Paramount/DreamWorks), and the rest was divided between a dozen

Table 2. DVD AND BLU-RAY RETAILERS IN RUSSIA

DVD-STORE CATEGORY	STORES	TOTAL NUMBER OF STORES	IN MOSCOW	IN THE REGIONS	TOTAL NUMBER OF CITIES
Specialty networks	Nastroyenie	70	60	10	2
	Soyuz	50	24	26	13
	1C Interes	38	14	24	20
	Hitzona	32	21	11	11
	<b>Total</b>	<b>190</b>	<b>119</b>	<b>71</b>	
Home appliances and electronics networks	Eldorado	700	28	672	no information
	M.video	177	41	136	73
	Mediamarkt	21	7	14	10
	<b>Total</b>	<b>898</b>	<b>76</b>	<b>822</b>	
Food retail networks	Magnit	3348	55	3293	no information
	X5 Retail Group	1365	310	1055	no information
	Metro	52	8	44	36
	Ok	48	1	47	no information
	Auchan	38	19	19	16
	Lenta	36	0	36	17
	<b>Total</b>	<b>4887</b>	<b>393</b>	<b>4494</b>	

Source: Booker's Bulletin

distributors. The latter as a rule had one, maximum two Blu-ray disks out of 20 releases. In the last half of the year the minimum retail price for a film in Blu-ray format was 300-400 rubles (~\$10-13.3), the maximum price was 1,300-1,500 rubles (~\$43.3-50). There was also a big segment of disks at a price of 500-700 rubles (~\$16.7-23.3) for a disk. Typical sales of many releases were fixed at the number of 1,000-3,000 copies, depending of the distributor's activity. And the most successful of Blu-ray releases was Casino Royale, the first Russian Blu-ray release, which sold 20,000 copies. Avatar can probably surpass this result but such sales are at the moment quite rare for Blu-ray format on the Russian market.

The biggest retailers of DVD products in Russia can be provisionally divided into 3 categories. The first one includes specialty networks such as Soyuz, 1C Interes, Hitzona and Nastroyenie. The second one includes large retailers of household appliances and electronics such as M-Video, Eldorado and MediaMarkt. The third group represents food retail, ranging from small shops to hypermarkets such as X5 Retail Group (including Perekrestok, Pyaterochka and Karusel), Auchan, Metro, Ok, Lenta and Magnit. Large book networks also work with DVDs, and ozon.ru remains one of the largest internet-shops in Russia. The above mentioned networks and shops differ not only by their specialization but also by their customers' preferences.

## TELEVISION

There are 20 national free of charge terrestrial channels in Russia. But only three of them have almost 100% coverage throughout Russia. They are Channel One, Rossia and NTV. The rest of the channels have lesser coverage but only two of them don't reach 50% rate – 2x2 and Euronews. Most broadcasters are private

commercial companies. Major state broadcasting company – VGTRK – owns the following channels: Rossia, Kultura, Sport, news channel Vesti and children channel – Bibigon<sup>1</sup>.

There are more than thousand local broadcasters, however the major part of them are partners or participants of national commercial networks (STS, TNT, Ren TV and others). Only 15 local private

Table 3. NATIONAL TERRESTRIAL TV CHANNELS

TV CHANNEL	MEDIAHOLDING	THEME	COVERAGE, % OF POPULATION
Channel One	Channel One	information, entertainment	98
Rossia	VGTRK	information, entertainment	98
NTV	Gazprom-Media	information, entertainment	96
STS	STS Media	entertainment	91
TNT	Gazprom-Media	entertainment	89
Kultura	VGTRK	culture	88
RenTV	NMG	information, entertainment	86
TV Centre	Moscow Government	information, entertainment	78
Sport	VGTRK	sport	76
Domashniy	STS Media	entertainment	76
TV-3	Prof-Media	mystic	75
5th Channel	NMG	information, entertainment	72
MuzTV	AF Media Holding	music	69
DTV	STS Media	entertainment	68
Vesti	VGTRK	information	67
Zvezda	Ministry of Defence	patriotic	63
MTV	Prof-Media	music	61
7TV	AF Media Holding	sport	52
EURONEWS	VGTRK	information	44
2X2	Prof-Media	animation	36

Source: Video International Research Department

<sup>1</sup> In the beginning of 2010 VGTRK changed images of its channels and now they are called Rossia 1 (former Rossia), Rossia 2 (Sport), Rossia K (Kultura), Rossia 24 (Vesti) and Bibigon.

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Table 4. THE LARGEST PAY TV THEMATIC CHANNELS

CHANNEL	PRODUCTION	THEME	COVERAGE, % OF POPULATION	DAILY COVERAGE %
Bibigon	VGTRK	children	25,2	1,8
Discovery Channel	Discovery Communications Inc	education entertainment	22,3	4,0
Animal Planet	Discovery Communications Inc	education entertainment	20,2	3,3
TV 1000	MTG	movies and series	18,9	3,6
Eurosport	TF1 Group	sport	17,9	2,0
RBC TV	RBC	information analytics	17,3	4,0
Telenana	First Channel	children	14,7	1,4
Jetix	Walt Disney Company	children	14,3	1,9
Hunting and Fishing	Comstar Direct	educational	13,5	0,6
TV 1000 Russian movies	MTG	movie	13,2	3,0
National Geographic Channel	National Geographic Society	educational	11,8	1,5
Mir	Mir	information	11,8	2,6
Humor TV	Music Box Group	entertainment	10,8	1,1
TDK	RIKOR	education entertainment	10,4	1,4
Viasat History	MTG	educational	9,6	1,4
Ru.TV	Russian Mediagroup	music	9,3	3,1
Detskij mir	MediaMart	children	8,7	1,6
Fashion TV		fashion	8,4	0,7
Music Box	Music Box Group	music	8,3	0,6
TV XXI	Metromedia International Telecommunications, Inc	movie	8,3	1,1

Source: Video International Research Department

companies broadcast content of their own production during the whole day. There are also a number of local state broadcasters.

On average 11 national and 6 local terrestrial channels broadcast in cities with population more than 100 thousand people.

Pay TV has been emerging in Russia for the last 4 years, mostly cable networks. The

data on payTV penetration is contradictory, but most experts consider it to be more than 40% of households. About 230 thematic channels, distributed through pay cable networks and satellite, were operating in Russia in 2009. 14 channels of them have HD quality. 19 pay channels specialize on films, 11 – on TV-series. Beside there are 15 channels for children. Most part of its content is animation.

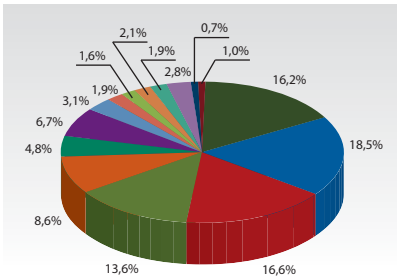


Chart 4. **SHARE OF MAIN TV CHANNELS IN 2009**

- Channel One
- Russia
- NTV
- STS
- RenTV
- TNT
- TV Center
- Kultura
- Sport
- Domashniy
- DTV
- TV-3
- Mus TV
- MTV
- Others

Source: Video International Research Department

Pay TV audience is younger, more masculine and has higher income than terrestrial TV audience.

According to the Federal Law "About Advertising" of the 3rd March 2009 in 2009 limits for advertising (including sponsorship and TV-shops) are 15% of hour (9 minutes).

Advertising market was affected by economic crisis in 2009. It decreased at 26% in general. TV market suffered less – only 18%. The income of TV in 2009 was 113.7 bl. rubles (3.6 bl dollars), - which is 56% of the whole market.

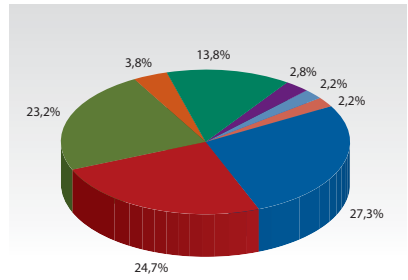


Chart 5. **FILMS: GENRE**

- Comedy
- Drama
- Action
- Detectiv
- Thriller
- Fantasy
- Erotics
- Others

Source: Video International Research Department

In December 2009 new amendments to law "About Advertising" were adopted. The share of agencies-sellers on TV is restricted to 35%. These changes will take effect from the 1st January 2011.

Six main national terrestrial TV channels with coverage more than 85% gather cumulatively almost 70% of all TV audience in Russia in 2009: First Channel, Russia, NTV, STS, RenTV, TNT. Major part of films and series' premieres is shown on these TV channels. Thus, further we will take into consideration only these channels.

The volume of all movie-production (films, series, documentary, animation) displayed on the 6 national TV channels in 2009 makes up to 23353 hours – that is almost half of all time.

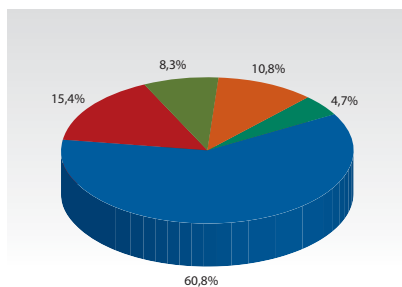


Chart 6. **FILMS: REGION OF PRODUCTION**

- Northern America
- Russia
- USSR
- Western Europe
- Others

Source: Video International Research Department

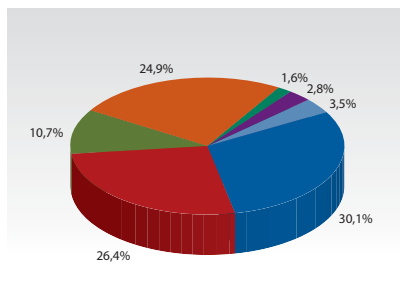


Chart 7. **SERIES: GENRES**

- Comedy
- Drama
- Action
- Detective
- Thriller
- Fantasy
- Others

Source: Video International Research Department

Table 5. **GENRE STRUCTURE OF CONTENT SHOWN ON SIX MAIN TV CHANNELS, 2009**

TYPE OF PROGRAMMS	VOLUME (HOURS)	SHARE (%)
Feature films	9636	20
Series	10373	21
Documentary	1093	2
Animation	2250	5
<b>Total movies</b>	<b>23353</b>	<b>48</b>
Entertainment programmes	9900	20
News	4125	9
Social and political programmes	1636	3
Educational programmes	1985	4
Sport	256	1
Commercials	5285	11
Other	1793	4
<b>Total</b>	<b>48333</b>	<b>100</b>

Source: Video International Research Department



Table 6. **TOP-20: THE MOST POPULAR PROGRAMS OF RUSSIAN TELEVISION IN 2009 (AUDIENCE 4+)**

Nº	PROGRAMM	COUNTRY	GENRE	DATE	TIME	RATING	SHARE	CHANNEL
1	Qualifying round of Football World Championship 2010 (Russia-Germany)		Sport	10.10.09	18:45	16,2	43,8	Channel One
2	Ney Year Blue Light 2009. Part 1	Russia	Entertainment	31.12.09	0:04	15,1	35,9	Rossia
3	Rot	Russia	Documentary	01.02.09	19:23	14,2	33,1	Channel One
4	Qualifying round of Football World Championship 2010 (Russia-Germany)		Sport	14.11.09	18:50	13,9	35,6	Channel One
5	Dairymaid from Hazapetovka. Challenge to Fate	Russia	Series	24.03.09	20:59	13,8	34,8	Rossia
6	Qualifying round of Football World Championship 2010 (Slovenia-Russia)		Sport	18.11.09	22:35	13,8	47,9	Channel One
7	Olivje-Show. New Year on Channel One	Russia	Entertainment	31.12.09	21:00	12,7	29,9	Channel One
8	Scumdog Millionair	USA	Feature film	03.04.09	21:29	12,7	33,7	Channel One
9	Wolf Messing: Looking through Time	Russia	Series	15.11.09	19:13	12,5	30,2	Rossia
10	Keys from Happiness	Russia	Feature film	07.02.09	18:53	11,8	31,4	Rossia
11	Eurovision 2009	Russia	Entertainment	16.05.09	22:59	11,7	52,9	Channel One
12	Varen'ka. Against Fate	Russia	Feature film	31.10.09	18:50	11,6	30,8	Rossia
13	Broad River	Russia	Series	05.02.09	21:39	11,2	29,9	Channel One
14	Steel Trap	Russia	Series	08.01.09	20:52	11,2	26,9	Rossia
15	Only Old Boys Attack	USSR	Feature film	09.05.09	21:37	11,1	36,5	Channel One
16	Comrades	Russia	Series	13.03.09	19:38	11,0	28,0	NTV
17	Big Difference	Russia	Entertainment	13.09.09	21:59	11,0	32,9	First channel
18	Always Say Always - 5	Russia	Series	28.08.09	21:00	11,0	32,7	Rossia
19	Zetta Group	Russia	Series	12.02.09	21:41	10,8	29,7	Channel One
20	Fate Irony	Russia	Feature film	31.12.09	17:51	10,7	28,3	Channel One

Source: Video International Research Department

Table 7. THE AMOUNT OF FEATURE FILMS AND TV MOVIES ON THE MAIN TV CHANNELS IN 2009

CHANNELS	TOTAL		PREMIERES		SHARE OF PREMIERES (%)	
	2008	2009	2008	2009	2008	2009
Channel One	1015	997	317	182	31	18
Rossia	872	876	184	117	21	13
NTV	615	757	117	167	19	22
STS	744	734	70	87	9	12
Ren-TV	602	532	158	84	26	16
TNT	414	356	50	71	12	20
<b>Total</b>	<b>4262</b>	<b>4252</b>	<b>896</b>	<b>708</b>	<b>21</b>	<b>17</b>

Source: Video International Research Department

Table 8. PREMIERE FILMS: GENRE AND REGION OF PRODUCTION

	WESTERN EUROPE	RUSSIA	NORTHERN AMERICA	OTHER	TOTAL
Comedy	26	24	113	7	170
Drama	21	41	58	13	133
Thriller	23	6	84	11	124
Melodrama	5	38	31	6	80
Action	13	8	49	6	76
Erotics	1		49	1	51
Adventure	8	4	29	8	49
Detectiv	2	8	10	2	22
Other		1	2	0	3
<b>Total</b>	<b>99</b>	<b>130</b>	<b>425</b>	<b>54</b>	<b>708</b>

Source: Video International Research Department

Films make up 40% of all movie-production at the six terrestrial TV channels. The leading genres are comedy, drama and action. More than 60% of films are USA production, 11% were produced in Western Europe.

The series offer differs a lot from films. Russian series make up more than 80% of all volume. Detectives make up 25% vs. 4% among films, and action make up only 11% (vs. 23% among films).

It is essential to mention, that other terrestrial channels (niche channels, with lesser audience coverage) has different genre structure. Foreign films and series on niche terrestrial channels

(Domashniy, DTV, TV-3, MTV) have rather good ratings for these channels though they cost reasonably. Russian studios do not produce some genres of series (mystic or fantastic for example). Niche channels (TV-3, the first mystic channel) is obliged to buy foreign content.

Films and series are traditionally the most popular programs on Russian TV. There are 7 series and 5 films among the twenty most popular programs in 2009.

The most popular film was Slumdog Millionaire, which was broadcasted of First Channel in a couple of months after cinema distribution. Not lesser



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audiences gathered two tv movies, shut specially for channel Rossia and broadcasted at weekends: melodramas Keys from Happiness and Varen'ka. Against Fate. Also still rather popular are soviet films – Fate Irony and Only old boys attack (colored version was shown on TV).

Among series melodrama Dairymaid from Hazapetovka and biography Wolf Messing: looking through time (both of Russian origin) were most popular.

4 thousands of films (by names) have been shown in 2009 on six main channels, almost 700 of them were premieres. The amount of new films decreased by almost 200 names compared to 2008, which is explained by decreasing income of TV channels during crises. First Channel and Rossia were leaders by the number of broadcast films – almost 1000 and 876 respectively. First Channel also led by number of premieres – 182 films. NTV took the second place – 167. NTV is the only channel which increased the number of films compared to 2008.

60% of premiere films were produced in the USA. The share of Russian films decreased from 25% (2008 year) to 20%. The most popular genres of premieres in 2009 were comedy, drama, melodrama and thriller. Most comedies and thrillers had US' origin. Last year the major part of dramas and melodramas were produced by Russian production studios, but in 2009 their share decreased to 1/3.

The most popular premiere of 2009 was Scumdog Millionaire (USA, Great Britain) – sensational world premiere of 2008. The 3rd part of pirates' adventures Pirates of the Caribbean. At world's end was also among the most popular films of the year. But all other 18 of 20 top-rated premiere films had Russian origin. In other words in spite of the fact that foreign film prevailed in share among

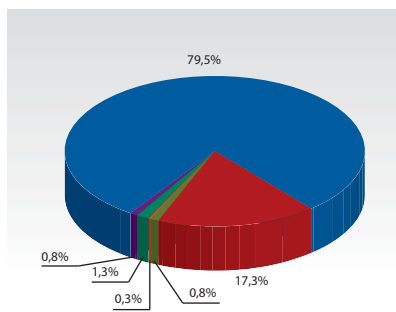


Chart 8. SERIES: REGION OF PRODUCTION

- Russia
- North America
- Western Europe
- South America
- USSR
- Others

Source: Video International Research Department

the premieres, the audience paid more attention to Russian films. Often it is a TV feature movie, which were specially shut only for TV broadcasting. Taras Bulba is the only feature film in top-20, which was shown in cinemas.

We should mention that the major part of foreign films were shown on network channels STS, TNT, Ren TV with lesser coverage than First channel and Rossia. On the last two channels foreign films were often shown in off-prime as their general competitiveness to Russian films is low. This can be explained by the fact, that audience of this channels mainly consist of old people. On the other hand foreign films are popular among younger people, who prefer to watch STS, TNT, Ren TV, visit cinemas, watch films on pay channels, on DVDs or through the Internet.

Table 9. TOP-20: TV PREMIERE FILMS IN 2009

	NAME	DATE	TIME	CHANNEL	RATING	SHARE	COUNTRY	TYPE
1	Scumdog Millionair	03.04.09	21:29	Channel One	12,7	33,7	USA	movie
2	Reys from Happiness	07.02.09	18:53	Rossia	11,8	31,4	Russia	tv movie
3	Varen'ka. Against Fate	31.10.09	18:50	Rossia	11,6	30,8	Russia	tv movie
4	Real Father	01.01.09	20:07	Rossia	10,6	27,3	Russia	tv movie
5	Surprise House	14.02.09	18:57	Rossia	10,5	28,5	Russia	tv movie
6	Pirates of the Caribbean. At world's end	01.03.09	18:00	Channel One	10,5	26,6	USA	movie
7	Night of Closed Doors	03.01.09	22:06	Rossia	10,3	29,8	Russia	tv movie
8	Taras Bul'ba	04.11.09	20:58	Rossia	10,1	26,6	Russia	movie
9	Blood is not Water	12.12.09	18:45	Rossia	10,0	26,5	Russia	tv movie
10	Governess	22.11.09	21:20	Rossia	9,9	25,6	Russia	tv movie
11	I Prefer Wedding at Summer	13.12.09	21:20	Rossia	9,5	24,0	Russia	tv movie
12	At Fenik's Track	18.10.09	21:16	Rossia	9,5	26,0	Russia	tv movie
13	One more Chance	28.02.09	19:05	Rossia	9,4	25,9	Russia	tv movie
14	Mine	21.02.09	19:15	Rossia	9,3	26,7	Russia	tv movie
15	Varen'ka. Love trial	24.10.09	18:50	Rossia	9,1	25,5	Russia	tv movie
16	Lubka	28.03.09	18:50	Rossia	9,1	25,4	Russia	tv movie
17	I will Live!	26.12.09	18:21	Rossia	9,0	23,6	Russia	tv movie
18	Red Bunches of Ashberry	28.11.09	17:42	Rossia	8,9	24,5	Russia	tv movie
19	Mother!!!	08.11.09	21:21	Rossia	8,8	23,7	Ukraine	tv movie
20	Love till Called for	06.12.09	21:24	Rossia	8,8	24,1	Russia	tv movie

Source: Video International Research Department

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phone: +7(812)600-03-01  
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### **Russian Film Group**

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### **Star Media**

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fax: +7(495)356-47-00  
e-mail: office@starmediafilm.ru  
www.starmediafilm.ru

### **Stella Studio**

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Moscow, 119991 Russia  
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e-mail: stella@mosfilm.ru

### **St.Petersburg Documentary Film Studio**

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fax: +7(812)714-33-04  
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### **Sverdlovsk Film Studio**

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fax: +7(343)350-15-34  
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### **Telealliance Media Group**

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### **The Andrei Konchalovsky Production Center**

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Moscow, 125124 Russia  
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### **Top Line Group**

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### **Triix Media Group**

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www.vertov.ru

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www.bbp-alians.ru

### **Way Film Company**

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### **Channel One Russia**

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www.1tv.ru

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### **Centre of National Film**

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e-mail: cnf@cnf.ru  
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 Business Centre "Forum", Bld. 8D  
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e-mail: welcome@nevafilm.ru  
 www.studios.nevafilm.ru

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 www.rentacam.ru

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e-mail: +36(0)1-47-48-100

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### **Creative TV Association (TTO, TV-Film)**

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**Donskaya 32**

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e-mail: info@kino-proekt.ru  
www.kino-proekt.ru

**Magic Film**

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e-mail: studio@magicfilm.ru  
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**Media City**

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city.ru  
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www.mosfilm.ru

**Nevafilm Digital**

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www.digital.nevafilm.ru

**Nevafilm Cinemas**

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fax: +7(812)352-69-69  
e-mail: cinemas@nevafilm.ru  
www.cinemas.nevafilm.ru

**Partner TV**

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Moscow, 127427 Russia  
phone: +7(495)617-82-30  
e-mail: veol2007@mail.ru

### **Pythagor Studios LLC**

9 Bldg., Bolshoi Savvinsky lane,  
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phone: +7(499)248-17-05, +7(499)  
248-64-07  
e-mail: info@pythagor.ru

### **Rentacam**

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e-mail: cinedoc@peterstar.ru  
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phone: +7(495)245-36-25  
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www.karofilm.ru

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phone: +7(495)241-16-02  
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e-mail: post@intercin.ru  
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phone: +7(495)646-98-60  
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