

BUSINESS MODELS AND VALUE CHAINS IN AUDIOVISUAL MEDIA



Research within the Framework of the Baltic Sea Region Programme FIRST MOTION 2007–2013



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INTRODUCTION

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The Research Motivation

Considerable changes have happened in the global media world in the last decade where, on the one hand, a number of new formats and platforms have been created but, on the other hand, customs and requirements of clients have changed rapidly, therefore products of audiovisual media are exploited in rather different combinations than before. The rapid development and growth of accessibility of the Internet has substantially influenced these processes, resulting in not only quicker distribution of audiovisual media but also much more intensive involvement of users in the development of media products. All-embracing advertisements in different media (*cross media*) is an example to how informative contents can be produced with the assistance of the numerous media formats and platforms, which, as a result of the interaction and exchange of ideas, create new media products and technologies, thus developing new forms of expression and communication as well as new and unique experiences for the creators and users. Thus new business models appear as a result.

Five or ten years ago, strategic business entities of Baltic States' media companies consisted of separate media products, for example, films, TV, press and books, and computer games; besides, every company usually created only products of one type of media. Presently, new business models and value chains based on cooperation among companies of different audiovisual media and other creative industries, involvement of users in content creation, development of technologies and distribution platforms, uniform marketing strategies and new models of financing have been developing both internationally and in the Baltic States.

Consequently, the *goal of this research* is to examine the existing situation in the audiovisual media sector in

the Baltic States and, analyzing the latest trends in the world, to provide suggestions for possible development of new business models and value chains.

Methods of research are as follows: analysis of literature and other sources of information, analysis of statistical data and interviews with audiovisual sector experts and company executives in all of the Baltic States. During the research 15 interviews were conducted both directly and electronically. The basis for this research also consists of the presentation and discussion materials of the Tallinn Summer School seminar, "New Media and Innovation Management".

The Research Report comprises two chapters, the first of which examines the existing situation in the audiovisual industry in the Baltic States, and the second inspects possibilities of development in the audiovisual media sector in the Baltic States. The report structure has been developed taking into account issues of the given task. Chapter One consists of the review on the education in the audiovisual sector, a summary of activities and services rendered by film, TV, and animation studios, as well as other creators of audiovisual products, analysis of traditional and new forms of distribution, and evaluation of the impact of digital technology on the costs of products and distribution. Chapter Two surveys international practice in the development of new business models in the audiovisual media sector and provides suggestions for opportunities of development in the Baltic States.

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The research contractor is SIA "Jura Podnieka studija"; the report is drafted by Antra Cilinska, Kaspars Šteinbergs and Dr. Tatjana Volkova.

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1. THE EXISTING SITUATION IN THE AUDIOVISUAL MEDIA SECTOR IN THE BALTIC STATES

1.1. Possibilities for Education in the Audiovisual Media Sector

The Baltic States offer a rather wide selection of study programmes in the audiovisual media sector. Entrants have possibilities to choose both narrow and specialized courses, for example, in sound direction at the Lithuanian Academy of Music and Theatre, or comprehensive study programmes like new media art at Liepaja University. It is possible to receive all college, bachelor and master level education in the audiovisual media sector in study programmes in Estonian, Latvian, Lithuanian, English, Russian and Belorussian languages, both in the capitals and regions. However, the offer of education differs in Estonia, Latvia and Lithuania (see Appendix 1); therefore the following paragraphs will provide a survey of what is offered in each of the Baltic States.

1.1.1. Education Possibilities in the Audiovisual Media Sector in Estonia

In Estonia, almost all of the study programmes in the audiovisual media sector are available in its capital, Tallinn, where the Baltic Film and Media School at Tallinn University and the Estonian Academy of Arts (*Eesti Kunstiakadeemia*) are situated. The only study programme outside Tallinn in the sector of audiovisual media is Media and Advertisement Design offered by Tartu Art College.

The Baltic Film and Media School (BFMS) at Tallinn University was established in 2005 and offers bachelor (3 year) and master (2 year) studies in film, TV etc., specialties of audiovisual media as well as public relations both in Estonian and English languages. The international orientation of the school ever since it was founded has attracted more than 350 students and professors from more than 15 countries, thus exporting successfully the service of educating and training professionals, able to work in a global environment. It is possible to master all the professional skills necessary for audiovisual media at the shooting pavilions, TV studio, postproduction laboratory, and sound studio of the school, which are all equipped with the latest and most up-to-date equipment and technology. The tuition fee is from EUR 2,375 per year for the programmes in Estonian and EUR 3,000 for the programme in English; however, scholarships that fully compensate

the tuition are available to Baltic students. The school has its own sites in the social and video portals.

The Estonian Academy of Arts offers two study programmes in the audiovisual media sector: bachelor (3 year) and master (2 year, also in English) animation studies and master studies (2 year) in interactive multimedia. It is possible to master the basics of animation in the bachelor studies in animation programme; and the programme is orientated to puppet animation filmmaking. The master programme, also available in English, together with professional courses offers general courses, like project management. Courses on the history of the development of multimedia, development and producing of media projects, programming, development, and management of multimedia projects in different environments, are integrated in the Master Programme in Interactive Multimedia.

Studies for a fee are available, but scholarships covering full tuition are available for the best students.

1.1.2. Education Possibilities in the Audiovisual Media Sector in Latvia

In Latvia all of the possibilities in receiving education are connected with the capital, Riga, where several study programmes are offered both by state and private higher education institutions. The leading institution that offers education in the area of audiovisual media is the Latvian Academy of Culture (LKA). The Latvian Academy of Arts (LMA) also offers education in several specialties and, according to requirements in the labour market, new programmes of audiovisual media studies have also opened in private higher educational institutions.

The department of Theatre and Audiovisual Art at LKA was established in 1992, and offers bachelor (4 year) studies in the theory of audiovisual arts, photography, drama, and film direction, as well as master (2 year) studies in audiovisual arts. Enrolment for the programmes is held periodically, and by 2009 the total number of graduates from all of the audiovisual media programmes comprised 88 bachelors and 18 master's graduates. Studies are in Latvian, and the best local specialists from both the academic and professional circles in the audiovisual media sector ensure the cost of tuition. Professional skills can be mastered at the shooting pavilion and computer editing facilities, and by using sound recording, shooting and lighting equipment, however, in line with modern requirements and the latest technology, technical updates are necessary. Subsidized study places are available in all

the programmes, and students can also enrol for a tuition cost which is from EUR 1,540 per year.

Audiovisual media sector education at LMA is provided in two areas – visual communication and stage design, and the study programmes are carried out by the Department of Audiovisual Media Art which was established in 2006. Subsidized study places are only available at the bachelor (4 year) and master (2 year) levels; the studies take place in Latvian, and professional skills are mastered in workshops and at the Laboratory of Digital Technologies. Some of the best experts in this area in Latvia work with the students.

In recent years, reacting to the global development of creative economics and tendencies of labour market requirements, private higher educational institutions in Latvia have also established several study programmes in the audiovisual media sector. The Riga International School of Economics and Business Administration (RSEBAA) offers education in different specialties of audiovisual media (TV and film producer, director, scriptwriter and director of photography) in both bachelor (4 year) and master (2 year) level. Courses are taught in Latvian, Russian and English by sector professionals from Latvia and abroad. To master professional skills, students have an opportunity to use the most up-to-date technology and processing software. The tuition charge for full-time students is from EUR 2,095 per year, but the school also offers subsidized study places and discounts. Together with the Riga Motion Pictures Studio and Cinevilla Ltd., RSEBAA are the founders of the Latvian Film Producers Association.

The International Higher School of Practical Psychology (SPAA) also offers bachelor studies (4 year) in audiovisual arts, specializing as follows: art photographer, director of TV photography, TV director and scriptwriter. The study programme is implemented by both academic education professors and well-known audiovisual sector practitioners in Latvia (photographers, TV directors of photography, script writers), whose professional work has received both domestic and international acclaim. Respected international experts from the audiovisual sector will also be invited as guest lecturers.

From autumn 2010, a “Multimedia Communication” programme is offered at Riga Stradins University; the duration of studies is 3 years, the language is Latvian, and the study fee is EUR 1,610 per year. It consists of courses that allow mastering both theoretical and practical knowledge in such study areas as communication, audiovisual art, project management, new and social media, etc.

The only offer in the audiovisual media sector from regional higher education institutions is at Liepaja University with its bachelor (3 year) and master (2 year) study programmes in new media art. Courses in different areas of audiovisual media are incorporated into the study programme, provided by the university lecturers (including the staff of the Art Research Laboratory) in cooperation with guest lecturers from other schools in Latvia and Europe. The study programme has both subsidized and regular study places, and the tuition charge is from EUR 1720 per year.

1.1.3. Education Possibilities in the Audiovisual Media Sector in Lithuania

Lithuania offers educational possibilities in the audiovisual media sector both in its capital, Vilnius, the second largest town, Kaunas, as well as in Siauliai, all at the college, bachelor and masters' level of studies. The Lithuanian Academy of Music and Theatre (*Lietuvos muzikos ir teatro akademija*) offers the greatest number of study programmes in the audiovisual media sector both at the bachelor and masters level of studies, but almost every large, higher educational institution in Lithuania has at least one study programme related to audiovisual media. The duration of all the bachelor study programmes in audiovisual media is 4 years, whereas the duration of the master programmes is 2 years. There are mainly subsidized places in all the study programmes; the courses are taught in Lithuanian.

The faculty of Theatre and Film of the Lithuanian Academy of Music and Theatre provides altogether 6 bachelor and 4 master level study programmes in the audiovisual media sector in the following specialties: cinematography, film studies, scriptwriting, film management, sound direction and TV direction. The studies are provided by the best experts of the audiovisual sector both from academic and professional circles. Students can master professional skills in the Audio, Video and Internet Centre of the Academy, where a film studio, shooting equipment, processing equipment, etc. and other necessary technology is available.

The Vilnius Academy of Arts (*Vilniaus dailės akademija*) offers a bachelor level study programme in animation as well as bachelor and master level study programmes in photography and media art.

The Vilnius Gediminas Technical University (*Vilniaus Gedimino technikos universitetas*) provides a bachelor study programme in the creative industry, a study programme established in 2008 incorporating several audiovisual media courses, offering two areas of study – creative communication and media projects.

The European Humanities University (*Еўрапейскі гуманітарны ўніверсітэт*) is a university founded in Belorussia, which, since 2005, continues its activities in Vilnius and is orientated towards Belorussian speaking students. A bachelor level study programme, Media and Visual Design, is offered; the languages are Belorussian and Russian.

The Kaunas University of Technology (*Kauno Technologijos Universitetas*) offers a bachelor level study programme, Music Technologies, including several courses from the audiovisual field, and a master level study programme, Media Philosophy, which examines a number of academic issues of audiovisual media.

Vytautas Magnus University (*Vytauto Didžiojo Universitetas*) in Kaunas offers a bachelor level programme, New Media Art, which integrates different disciplines from different fields of audiovisual media and, unlike most of the study programmes in Lithuania, charges a tuition of EUR 3,145 per year.

In Kaunas, college level education in the field of au-

audiovisual media, in multimedia technologies, is offered by Kaunas College (*Kauno kolegija*).

One can also receive a college level education in multimedia technologies at Siauliai College (*Siaures Lietuvos kolegija*), and receive a bachelor's degree in the audio-visual arts programme at Siauliai University (*Siaures universitetas*).

1.1.4. Summary

To sum it up, 2 college level, 25 bachelor level and 15 master level study programmes in different specialities of audiovisual media, from classic programmes in film education to contemporary study programmes in new media, are offered in the Baltic States.

In Estonia, practically all the study programmes are available in its capital, Tallinn, at two state-founded schools: the Baltic Film and Media School at Tallinn University (BFMS) and the Estonian Academy of Arts (Academy). Consequently, BFMS provides education in video, film and TV art, direction and photography, as well as producing, whereas the Academy has study programmes in animation and new media art. Like other studies in Estonia, bachelor studies in these programmes last for three years while master studies last for two years. Studies are for a fee but scholarships are available to the best and most talented students, covering the tuition cost in full or partially. The fact that a large part of the study programmes are taught in English can be valued positively since it allows for inviting guest lecturers from abroad and the enrolment of students from abroad, thus creating higher added value to the export of educational services. Besides, local students are able to receive an internationally competitive education, which means that the graduates of these study programmes will not only be able to work in the local market but also build international careers.

In Latvia, higher education in audiovisual media specialities is available at several state and private schools, mostly in the capital, Riga. Different specialities in film and arts can be mastered at the Latvian Academy of Culture (LKA) and the Latvian Academy of Arts (LMA). Bachelor level studies are 4 years, but master studies – for 2 years, and the course language is Latvian. Studies are mostly financed from the state budget but LKA also has several fee-payment study places. Both schools train specialists mainly for the local market. Study programmes in audiovisual media art have only relatively recently been offered by private schools (RSEBAA, SPAA), for paid tuition and in Latvian, Russian and English. Due to the short existence of these programmes it is impossible to evaluate their quality and how the graduates perform in regards to the requirements of the labour market. An integrated study programme, New Media, is available also outside Riga, at Liepaja University. This is also a new programme coping with the constantly growing demand for education in the field of audiovisual media.

In Lithuania, the choice of different audiovisual media study programmes in higher education institutes are mostly in the capital, Vilnius, and the towns of Kaunas and Siauliai. Most of the programmes are financed from

the state budget and courses are taught in Lithuanian. Bachelor level studies are 4 years long, master studies – 2 years. Film education specialities can be mastered at the Lithuanian Academy of Music and Theatre, but education in fields like animation, new media and multimedia art, music technologies, etc., are offered at various schools all over Lithuania. Like in Latvia, these programmes train experts mainly for the local market.

Education in the field of audiovisual media in all of the Baltic States is provided by the best specialists of both creative and academic circles. The main part of the study programme is provided in cooperation with industry companies, thus providing for better professional training of the students, though not all study programmes have appropriate and up-to-date material and technology available. Most of the schools enable graduates of master programmes to follow-up with doctoral studies in art or culture, or choose doctoral studies in management, education management, or other fields.

It is likely that in the future education requirement in the field of audiovisual media will grow, but in creating new programmes the following guidelines should be taken into consideration. Firstly, studies should be organized according to the model 3+2, i.e., three year bachelor studies plus two year master studies. Secondly, with the growing requirement for more extensive studies instead of specialized study programmes, students should be offered to choose a particular field of study already at the master level. Study programmes should not be integrated only within the field of various audiovisual media, but also within academic fields, i.e., art programmes should be integrated within the studies of management and technology. Already now particular master study programmes also offer degrees in art and science. Thirdly, programmes should be offered in English and other foreign languages thus creating competitive privilege for the graduates in the global labour market and favouring the export of educational services.

1.2. Film, TV and Animation Studios and Services Rendered

1.2.1. Film Studios

The first independent film studios in the Baltic States began to appear at the end of 1980s and beginning of 1990s. Prior to that all film production was situated at a single local state film studio or state television. The first film studios were founded by film directors or, in individual cases, other creative or technical filmmakers without any or with minimum experience in film production and company management within the conditions of market economics. With time, studio executives perfected their knowledge and hired correspondingly educated professionals or established joint ventures with film studios abroad. Consequently, in all of the Baltic States, several leading film studios were established and operate up to now, and have, during the last five years, completed several full-length art and documentary film projects, as well as a number of short films and other audiovisual media

Chart 1 / STATE SUPPORT OF THE FILM INDUSTRY IN THE BALTIC STATES

| Total state funding of the film industry (2005-2009), mil EUR | Estonia | Latvia | Lithuania |
|---|---------|--------|-----------|
| | 27,4 | 19,1 | 10,5 |

Sources: Facts & Figures 2009/ Baltic Films, Facts & Figures 2008/ Baltic Films, Facts & Figures 2007/Baltic Films

projects. These are the studios that also actively participate in coproduction of films and render production services for foreign film projects.

In each country there are several film studios operating that can still be regarded as *one person studios*, i.e., the studio is run by the owner who is a producer, director and often also performs other functions. During the last five years most of these studios have made only one full-length feature film project, which is often the only source of the studio's income. In comparing the information summarized in Appendix 2 on the full-length film projects made in each country and the number of film studios involved in the production to the total state support of the film industry (see Chart 1), it can be concluded that greater funding not only allows for more films to be produced, but also increase the number of film studios involved in production, including studios that have only produced one full-length film during the last five years.

A relatively large number of film studios engaged in film producing, totaling in tens, are officially registered in each of the Baltic States, whereas the number of actively operating ones is, on average, around twenty. The next section will survey the activities of all the leading and the *small* film studios.

Film Studios in Estonia

Acuba Films is engaged in producing feature films, documentary films and commercials. The most significant films made by the studio were *The End of Poetry* (2009) and *The Hostage* (2006 coproduction with the Latvian *Kompanija Hargla* and Slovenian *Casablanca Film Production*).

Allfilm is a film production company engaged in the production of feature and documentary films, TV films, TV commercials and music videos. The following full-length feature film projects can be listed among the studio's most significant recent productions: *Vasha* (2009 coproduction with the German *Homberg Filmproduktion*, Finnish *Juonifilmi* and Irish *Wide Eye Films*), *Georg* (2007 coproduction with the Russian *CNF* and Finnish *MRP Matila Röhr Productions*), *The Knife* (2007), *Ruudi* (2006 coproduction with the German *Schmidtz Katze Filmkollektiv* and Finnish *MRP Matila Röhr Productions*) and the documentary *The Singing Revolution* (2006 coproduction with US *Mountain View Productions* and Northern *Light Production*). Allfilm is also involved in the production of the documentary TV series, "Estonian Stories". Films made by Allfilm have been screened at various film festivals, but to date the children's

film *Ruudi* has received the highest honours.

Amrion is mainly engaged in producing Estonian feature and documentary films. The following films are among the studio's most significant recent productions: *I was Here* (2008 coproduction with the Finnish *Helsinki Film*), *The Class* (2007) and *Mat the Cat* (2005). Amrion studio's films have been widely represented at film festivals all over the world.

Exitfilm is a film studio founded in 1992 by producer Peeter Urbla and the Danish *Zentropa ApS*, and operates very successfully both in the production of national and coproduction films. The following films projects are among the most significant recent productions: full-length feature films *Taarka* (2008), *Where Souls Go* (2007), *Shop of Dreams* (2005 coproduction with the Finnish company *Silva Mysterium OY*), and *Men at Arms* (2005). Exitfilm has also produced various TV films. Their films have been screened with varying degrees of success at both film festivals in Europe and beyond. Moreover, a separate informative web site is set-up for each film and used as a marketing platform.

Homeless Bob Productions with its film *The Temptation of St Tony* (2009) has merited much praise in a number of important film festivals. The film is an Estonian-Finnish coproduction and in 2010 was shown in film theatres in seven cities in the USA.

Kuukulgur Film is a film studio specialising mainly in the production of documentaries, feature films and commercials. The following films are among the studio's most significant recent productions: *The Revolution that Wasn't* (2009 coproduction with the Finnish *MRP Matila Röhr Productions*), *Nazis and Blondes* (2008 coproduction with the Latvian *Subjektiv Filma*), *Autumn Ball* (2007) and *186 Kilometres* (2007). The studio's films have been shown with varying degrees of success at several international film festivals.

Ruut is an Estonian studio that produces TV shows and films, documentary films and TV commercials. The following films are among the studio's most significant recent productions: *Kinnunen* (2007), *Greetings from Soviet Estonia* (2007) and *Wind Room* (2007). The studio also produced various TV shows.

The following important and perspective film studios in Estonia should also be mentioned: *Taska Film*, *Estin-film*, *F-Seitse*, *Luxfilm*, *Vitamin K Film*, *Filmivabrik*, *Baltic Film Production*.

Film Studios in Latvia

Ego Media is a film studio founded in 2005 and engaged in the production of feature and documentary films as well as in rendering services to foreign producers. The following films are among the studio's most significant recent productions: *The Hunt* (2009), *The Olympic Man (Lohengrin from Varka Crew, 2009)* and *My Mother's Farm* (2008 coproduction with the Norwegian *Bivrost film & TV*). In co-operation with Ego Media the German company *TAG/TRAUM Filmproduktion* shot the film *The Invention of a Currywurst* in Riga in 2007.

Fa Filma was founded in 1997 and focuses on producing feature and documentary films. The studio focuses on individual vision in cinema by producing films that reflect our time for audiences attracted by new developments. Fa Filma also organizes a weekly film club *Horizons* and is currently developing an independent distribution programme for films made by young people. The most important films made by the studio have been the feature film *Monotony* (2007), the documentary *But the Hour is Near* (2004) and *Family Instinct* (2010.)

Film Angels Studio is mostly engaged in providing film production service both for local and international film projects. Lately the studio has actively exploited the possibilities offered by Riga Film Fund in cooperating with foreign producers in implementing film projects in Latvia (see more on p.28). The studio also had a successful national production: *Vogelfrei* (2007).

Juris Podnieks Studio is named after the great film director Juris Podnieks. The studio is engaged in three kinds of activities – production of their own animated, documentary and feature films, providing services and the production of commercials. The studio is also engaged in dubbing of films. The following films are among the studio's best-known projects: the sequels of the documentary *Is It Easy to Be Young* after 10 and 20 years, and films about historical events like *The Baltic Saga* (2000) and *Barricades for Freedom* (2001). The studio cooperates with young directors and this cooperation has resulted in the outstanding documentaries, *How are you Doing, Rudolf Ming* (2010) and *Behind the Wire* (2010). Several feature film projects are in development.

Kaupo Filma is one of the oldest film studios in Latvia engaged in both producing feature and documentary films. The following feature films are among the studio's most significant recent productions: *Midsummer Madness* (2007 coproduction with the Austrian *Fischerfilm* and British *Steve Walsh Productions*), *The Dark Deer* (2006 coproduction with the Austrian *Fischerfilm*), as well as the documentaries *The Perpetual Rehearsal* (2009), *The Monument* (2004 coproduction with the German TV *ARTE/RBB*) and *Romeo and Juliet* (2004).

Krukfilms is a new company. After the international

success of *Loss* (directed by Māris Martinsons) the producer of the film, Linda Krūkle, founded this company, which she produced Martinsons' film *Amaya* (2010), a coproduction with Latvia, Lithuania and Hong Kong. The main goal of Krukfilms is to produce films that unite the cinematic traditions of the East and the West and are made for international audiences. Krukfilms produces documentary, feature and TV projects.

Latsfilma is director Una Celma's film studio and is engaged in the production of documentary and feature films. The following films are among the studio's most significant recent productions: *Finding Elvis* (2008), *Don't Talk About It* (2007), *Maximum Headroom* (2005 coproduction with the Swedish *Lats Film AB*), as well as the documentaries *The Man with 150 000 USD Prize on His Head* (2009) and *The Women and the Guards* (2009).

Locomotive Productions is a film studio founded in 1999. Films and TV programs produced by the studio can be characterized as having a thematic spectrum that encompasses social, anthropologic and humanitarian orientation. The scope is even wider – from Latin America and Cuba to Africa and the Middle East as well as Europe to India. The studio produces both documentary and feature films. *Philosopher. Escaped* (2005) is a film about the eccentric and paradoxical Russian philosopher Alexander Piatigorsky, an expert in Buddhism and Ancient Indian philosophy, a legendary figure in the Russian intellectual circles since 1960s, and a famous writer who “collects interesting people” and “does not want to get ready for death”. At present the studio is producing feature films produced including *People There* by the young director Aiks Karapetjans.

Mistrus Media is a partnership of creative people established to create documentary, analytical and creative culture and business projects in the form of documentaries, TV programs, advertisements, discussion groups, research projects, conferences and training of creative thinking. Mistrus Media was established in 2000 by the journalist and political scientist Gints Grūbe, inviting professionals from different fields. The documentary *Sounds under the Sun* (2010) has gained wide popularity in Latvia and was screened in a number of international film festivals. The story is about the process of creating music within the framework of a unique cooperation project “World Sun Songs” between the Latvian youth choir *Kamēr...* and 17 contemporary composers from all over the world. Currently the studio is producing several new TV programmes and the production of five new documentary films continues.

Platforma Filma/Cinevilla is a film studio engaged in the production of feature films and rendering film production service, provides the services of a sound studio and video postproduction, as well as dealing with the management of a film back lot town, *Cinevilla*. The most significant recent films by the studio are *Bitter Wine* (2007), *The Defenders of Riga* (2009) and *Rudolf's Gold*

(2010). One of the most significant assets of the studio is the film town, *Cinevilla*, which was built during the shooting of *The Defenders of Riga*, ensures the possibility of shooting in a historical, rural and small-town setting. *Cinevilla* also offers tourism and entertainment services. At the moment *Platforma Filma/Cinevilla* has united with Riga Motion Pictures Studio under the brand of the latter.

Riga Motion Pictures Studio was founded in 1948 and since the beginning of the 1990s is basically engaged in rendering different film production services. The studio has shooting pavilions, lighting and sound equipment, as well as a wide collection of costumes at its disposal; it can also provide pyrotechnical and special effect services. The documentary *What Makes Man* (2009) is one of the most recent productions of the studio.

Studija Deviņi was founded in September, 1991. The name of the studio is heard most often in the context of Latvian filmmaking due to the different historical, social and cultural occurrences it has been engaged in. The studio has produced films that have touched upon themes important for a particular time period – from the time of the barricades in Latvia (*The Dome* by Laila Pakalniņa, 1991), to presenting a portrait of a Latvian soldier at a merciless turn of history (*The Latvian Legion*, 2000), to touching upon the still acute and topical social problem of drug addiction (*Going into Darkness*, 2003 by Ināra Kolmane), or depicting the struggle of the famous inventor of the H-bomb, Andrei Sakharov under the Soviet regime (*My Husband Andrei Sakharov*, 2006), always focusing on a person as a catalyst of the events of his time and environment. The same can be said about the film *Controversial History* (2010). The studio is currently engaged in a coproduction feature film project *Mona*.

Tanka is a new studio that produced the feature film *Return of Sergeant Lapins* (directed by Gatis Šmits), which has already received wide audience recognition.

Vides filmu studija specializes in producing documentaries, the most noteworthy being: *Jaguar's Corner* (2007), *Klucis: The Deconstruction of an Artist* (2008), *Worm* (2005), *Nahanni, Nahanni* (2007), *Three Men and a Fishpond* (2008), and others. The studio is engaged in the production of TV shows and commercials, as well as providing other film production services.

Apart from the surveyed studios, the following significant and perspective film studios in Latvia should be mentioned: Ansis Epners's studio *AVE*, *Elm Media*, *kompanija HARGLA*, *Studija Centurms*, *Screen Vision*, *F.O.R.M.A.*, *Subjektiv Filma* and *Çilde*.

Film Studios in Lithuania

A Propos is a film studio founded in 1993 by Vytautas Landsbergis that has mainly engaged in producing

documentary films, among which *We Have Talked on Time* (2006) can be mentioned as the most significant alongside with the feature film *When I Was a Partisan* (2008).

Baltic Film Group is a film production company founded in 2004 by Robertas Urbonas and is engaged in both the production of its own films and rendering services to producers from abroad. *Forests of Gods* (2005) can be mentioned as the most significant recent film. Production services have been provided on more than five international films.

Era Film is a film production company founded in 2001. It was established by producer Rasa Miskinute and is engaged in international film projects and has started to produce feature films in cooperation with Šarunas Bartas. A film about the famous animator Starcevič, *The Bug Trainer* (2008), was produced by the studio and has received much international acclaim.

Lietuvos Kino Studija was founded in 1940 and since the beginning of 1990s is engaged in rendering services to local film producers and TV studios as well as producers from abroad. Since 2004, when the studio was privatized, it has provided services for more than 50 foreign films and TV series, the most well-known among which are *The Courageous Heart of Irena Sendler* (2009, *Hallmark Hall of Fame*), *Trans-Siberian Express* (2008, *Filmax Group, Universum Film*), *Elizabeth I* (2005, *Company Pictures*), *Wallis and Edward* (2005, *Company Pictures, Atlantic Film Productions*). The services provided by the studio include shooting services, location management, lighting, costume rental, set decor, special effects, etc.

Studio Nominum was founded by Arunas Matelis in 1992. The studio produces both documentary and feature films, and their films have been shown at many international festivals. In 2006, Arunas Matelis received the Directors Guild of America award for best documentary, becoming the first director from Eastern and Central Europe to receive the award.

Uljanos Kim studija is engaged in producing documentary and feature films. The most important recent films made by the studio are: *You Am I* (2006 coproduction with the German *Pandora Film Produktion*), *Witch and Rain* (2007), *Perpetuum Mobile* (2008 coproduction with the French *Unlimited*) and *Northern Spring* (2008).

Tremora was founded in 2005 and is engaged mainly in feature film production, for example, *At Dawn* (2008), *The Collectress* (2008) and *Low Lights* (2009 co-operation with the German *dagstar film*). The studio creates web sites for its films for the purpose of information and marketing.

Apart from the surveyed studios, the following significant and perspective film studios in Lithuania should be mentioned: *Ketvirta versija*, *ARTeta* and *Baltic Films Services*.

Chart 2 / TELEVISION CHANNELS, THEIR OWNERS, AND SOURCES OF FINANCING IN THE BALTIC STATES

Television Channels in Estonia

| | | | | | | | |
|---------------------|--------------|------|--------------------|------|-----|-----------|----------|
| Television channel | ETV | ETV2 | TV3 | TV3+ | TV6 | Kanal2 | Kanal 11 |
| Owner | State (ERR) | | Modern Times Group | | | Schibsted | |
| Source of financing | State budget | | Commercials | | | | |

Television Channels in Latvia

| | | | | | | | |
|---------------------|----------------------------|------|--------------------|-------------|-----|------------------------------------|-----|
| Television channel | LTV1 | LTV7 | TV3 | TV3+ | TV6 | LNT | TV5 |
| Owner | State | | Modern Times Group | | | AS "Neatkarigie nacionālie mediji" | |
| Source of financing | State budget / commercials | | | Commercials | | | |

Television Channels in Lithuania

| | | | | | | | | |
|---------------------|----------------------------|-----|--------------------|-------------|-----------------|-----|---------------|-------------------|
| Television channel | LTV | LV2 | TV3 | TV6 | LNK | TV1 | BTV | Lietuvos rytas.tv |
| Owner | State (LRT) | | Modern Times Group | | MG Baltic Media | | Achemos grupe | Lietuvos rytas |
| Source of financing | State budget / commercials | | | Commercials | | | | |

Sources: Facts & Figures 2009/ Baltic Films and Internet resources

1.2.2. Television Channels

There are both public TV channels, founded in the middle of 1950s, and private TV channels, operating from the middle of the 1990s, in the Baltic States. Two state TV channels and 5-6 private TV channels with nation-wide coverage operate in each of the Baltic countries (see Chart 2), as well as several regional channels. Owners of the private channels are both local entrepreneurs and foreign media concerns, for example, the Swedish *Modern Times Group*.

Public Television Channels

In Estonia and Lithuania public TV channels operate in association with public radio channels, whereas in Latvia public television operates separately. In all of the Baltic States, national TV channels offer a full spectrum of film production services, but these resources are mostly used for making their own products. However, television films which are shown in film theatres are occasionally made in cooperation with film studios, for example, films exhibited by Estonian TV: *A Wish Tree* (2008, in co-operation with the studio *Revolver Film*), *Kinnunen* (2007, in co-operation with studio *Ruut*) and *Mindless* (2006, in cooperation with the *Taska film*). Several projects in co-operation with state TV channels have also been carried out in Latvia and Lithuania.

Television companies also ensure transmission of broadcasts for the necessities of foreign TV channels.

Private Television Channels

Television channels owned by the Swedish company *Modern Times Group* (MTG) occupy a fundamental market share, and the group also owns several radio stations in the Baltic States. Besides their own shows and news

broadcasts, the channels of the group also transmit national series, like *Kodu kese linna* in Estonia (since 2003), *Fire* in Latvia (since 2009), and *Gedimino 11* in Lithuania (since 2010). Moreover, MTG has opened a centre in Riga which will ensure the servicing and translation for more than 32 TV channels, including translation of all the channels of MTG Baltic.

Other private channels also broadcast their TV films and series, for example, the series *Kelgukoerad* broadcast by the Estonian Kanal2, or films by LNT (Latvia) made in cooperation with *Platforma Filma*, such as *I'm Buying Your Husband*.

1.2.3. Animation Studios

The development of the animation sector in the Baltics has been present since the middle of 1960s when animation departments were created in each country's film studios or established as creative teams at the televisions. Since the beginning of 1990s, private animation studios, which were the successors of the historical traditions, were founded, together with several new studios. Most of the animation studios in the Baltic States produce their own animated films as well as coproduce on international and coproduction projects. The animation sector has the greatest advantage in Estonia where it's possible to receive a high-level education in animation. It allows for the training of specialists using the most up-to-date technology, and thus studios are able to attract more state and coproduction projects. The worst situation is in Lithuanian where, for a long time, the state did not allocate funding for animation film productions.

Mainly short animated films are made in all the Baltic States, thus they are widely represented at international film festivals of different levels, as well as having received significant festival awards. However, over the recent years and, prospectively, also later, several full-length animation films have been produced, a number of which were made as coproduction with different countries.

Animation Studios in Estonia

A Film Estonia began its activities in 1994 as the daughter company of the Danish *A Film A/S*, the biggest animation studio in Scandinavia. Till 2005, the studio was engaged only in rendering animation services to foreign film projects, but now the studio also produces its own film projects. During the last five years the studio has worked on more than five foreign full-length animation film projects, animated TV series, as well as more than 30 commercials, other industry films and commercial products.

Eesti Joonisfilm was founded in 1971 as an animation department at *Tallinnfilm Studio*, but in 1994 started functioning as a private company, keeping the existing name. During the last five years the studio has made more than ten short animation films and one full-length film: *Lotte from Gadgetville* (2006, in coproduction with the Latvian *Rija Films*). Apart from the animation films, the studio has also produced several commercials.

Nukufilm began its activities as a puppet (later also plasticine) animation films division of *Tallinnfilm Studio*, but since 1993 it was restructured as a private company. *Nukufilm* is the biggest puppet animation studio in Northern Europe. During the last five years twenty short animation films and one full-length documentary film with animation elements, *Aja meistrid* (2008, in coproduction with *Exitfilm*), have been made at the studio.

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Apart from the surveyed studios, the following successful and perspective animation studios operate in Estonia: *Tolm Stuudio* and *Birds of Paradise*.

Animation Studios in Latvia

Animācijas brigade. A puppet animation film department founded at Riga Motion Pictures Studio in 1966, but since 1993 operating as a private company with the existing name. The studio is engaged both in producing its own animated films and in rendering services to foreign and coproduction puppet film projects. During the last years the studio has produced more than ten local short animation films and worked on two full-length coproduction films.

Atom Art. The studio has chosen the production of animation films and commercial videos as its main activities. The animation film *Spring in Varnu Street* (2009) has received much recognition from both viewers and industry professionals.

Juris Podnieks Studio. In 1999 Nils Skapāns joined the studio and has ever since been making his animation films there. His films are made using plasticine and are targeted at both children's and adult audiences. As his films mostly have no dialogue, they are very much appreciated both by the local and international audiences.

Nils Skapāns' films have also won international recognition. His films *Listen, Rabbit...Daddy Goes to London* (2004) and *Wonderful Day* (2010) have participated in competition at the Berlin International Film Festival.

Jetmedia. The studio was founded in 2004 and is engaged in both producing its own animation films and rendering services to coproduction films. Since the beginning the studio has worked on three full-length film projects, two coproduction animation series projects, as well as making two animation short films. Besides the animation film projects, the studio is also currently working on computer games.

Lunohod. The studio was founded in 2007 and is a base for creative and interesting people engaged in animation film productions. Animation film director Vladimirs Ļeščovs has worked on such well-known projects as the films *Sleeplessness* (2004), *Grandfather's Honey* (2002), which were produced in other animation studios, but the film *Wings and Oars* (2009) was made at the studio Lunohod. *Wings and Oars* has received wide international recognition.

Rija Films. *Rija Films* was founded in 1995 and operates successfully both in producing their own drawn and computer animated films as well as in rendering services to foreign and coproduction animation film projects. With the number of employees, full-length animation film projects in production and awards received at international festivals, the studio can be listed among the biggest and most successful animation studios in the Baltic States. During the last five years, the studio has been working on more than five local short film projects as well as several foreign and coproduction animation projects. The studio has also produced several documentary films. Currently there are short film projects and two full-length coproduction animation projects in the works. Film distribution and the rendering of various film production services for foreign film projects is also a part of the studio's activities.

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Apart from the surveyed studios, another successful and perspective Latvian animation film studios are *Urga, A. Bley Film Studio* but in 2010 studio *Dauka* shut its doors.

Animation Studios in Lithuania

Animation Studio. The studio was founded in 2004 and is engaged in the production of animation films, and during the last years has made seven animation short films.

Sezamai atsiverk. Sezamai atsiverk is one of the recently most active animation studios in Lithuania, which, during the last three years, has produced more than five animated film projects. The studio also works with foreign producers and on various advertising projects.

1.2.4. Summary

Since the 1990s a number of film studios, TV channels

and animation studios have been founded in the Baltic States, either using the material, technical and human resources bases established during the Soviet time, or developed in the recent past. In several cases, the transition from planned economy and state supported film industry to market economy and private commercial activity was accomplished less successfully, and therefore the state budget still remains the only source of financing for a number of studios, and they also do not offer any film production services. However, a number of studios have managed to successfully adjust to the changes and have been actively coproducing projects and rendering production services to foreign film productions, thus generating not only bigger budgets for their films projects, but also achieving a larger potential audience and possibilities to participate in film festivals.

The above mentioned relates more to feature and documentary film studios, and relates particularly to animation studios and less to TV channels. These companies provide various services in the preproduction, production and postproduction stages, both for their own necessities, and to other studios and exporting services. Nevertheless, there are also several relevant problems that hinder the development of the industry, such as, insufficient state funding, which cannot fully finance coproduction projects, overly fragmented usage of the funding, poor cooperation among TV channels and film studios, a lack of professional producers and managers, etc.

1.3. Other Creators of Audiovisual Products

Like everywhere in the world, audiovisual products in the Baltic States come about from co-operation between contractors of audiovisual services and other creative industries companies such as advertising agencies, computer game developers, programmers, Internet companies, etc.

Advertising as an Audiovisual Product

Advertising has a very important place both in marketing and public relations activities. Taking into account the scope and influence of the audiences, audiovisual media advertisements are often made as audiovisual products, thus making it possible to exploit cross-media and distribution platforms. Audiovisual advertisements are produced at film and animation studios specializing in the production of commercials and music videos. There are several studios in the Baltic States that have proved themselves very successfully in the production of audiovisual advertisements both for the local and, by rendering production services, for the international market. Often commercials and music videos, which have been produced here, are highly acclaimed all over the world receiving awards at prestigious festivals like *Cannes Lions*. These studios, among others in the Baltic States that successfully create advertisements as audiovisual products are as follows: *N2* (formerly *Vilks Productions*), *Baltic Pine Films*, *A Film Estonia*, *Kaos World Studio*, *Revolver Film*, *Rudolf*

Konimois Film, *Orbital Vox Studios*, *Artbox*, etc.

Computer and Video Games and Other Multimedia Products

With the development and accessibility of personal computers for an increasingly wide range of users and with the development and rapid growth of accessibility to the Internet, the computer and video games market also developed. Games are operated on personal computers or using game consoles, and they are distributed with data carriers or are accessible online; at the moment the mobile telephone games market is growing. To a great extent computer games are produced using audiovisual technology, for example, by using computer animation. Often computer games are made in the context of the merchandising of films, and in some cases income from the sales of computer games is equal to the income from the distribution of the film.

In the Baltic States, the production of computer games is underdeveloped, and most of the produced games are non-commercial products. Several software development companies, for example, the Estonian company *Blue Moon*, provide external services to foreign companies in the development of games. In 2008 *Studija Centurms* developed the computer game, *Build the Castle of Light*, and is currently working on a game based on the film *Bermon-tiada*. The animation studio *Jetmedia* is currently developing the computer game *Wonderbird*.

In recent years, involvement in various multimedia projects has been very topical, for example, the development of museum and exhibition displays, web sites, presentations, etc., where different audiovisual solutions, including animation, video, games, visualizations of maps, are integrated. Projects like these are often implemented on different platforms simultaneously, for example, with telephone access, web sites and the outside environment. In the Baltic States several companies specializing in implementation of such projects, for example, *Multimedia Mark*, *Dd Studio*, etc., have acclaimed achievements and been awarded at international exhibitions.

It is anticipated that the requirement for projects integrating different audiovisual solutions with programming, Internet, game, GPS, etc., elements will grow in future.

1.4. Distribution of Films: Existing Practices and Recent Tendencies

Channels of film distribution can be divided in four categories: film theatres and other places of public exhibition, television, distribution on data carriers and distribution on the Internet, as well as a combination or modifications of these channels.

Distribution of Films in Film Theatres

Since the 1990s, the number of operating film theatres

Chart 3 / SCREENING OF LOCAL FILMS IN THE BALTIC STATES, 2005–2009

| Country | Estonia | Latvia | Lithuania |
|--|---------|--------|-----------|
| The average number of premieres per year | 11 | 7 | 7 |
| % from the total number of films | 7,3% | 3,7% | 3,9% |
| The average attendance per year | 115'156 | 58'269 | 64'659 |
| % from the total | 8% | 3,1% | 2,6% |

Source: Facts & Figures 2005–2009/Baltic Films

has drastically decreased. This can be explained by insufficient financial resources, the necessity to modernize the Soviet era film theatres according to contemporary client service and technology requirements, the low purchasing capacity of the local population, and the new possibilities of high quality film viewing at home.

During the last five years local films comprise more than 7% from the total number of films screened in film theatres in Estonia, and close to 4% in Latvia and Lithuania. The attendance numbers for local films comprises an average 8% from the total attendance numbers in Estonia, but is lower in Lithuania and Latvia (see Chart 3). This can be explained with greater or lesser interest in national filmmaking as well as an appropriate or, conversely, inappropriate marketing of a film. This can be proven by the fact that every country has shown local films that have ranked in the top ten most attended films of the year.

Films are distributed in film theatres by the film studios, producers and distribution companies connected with film theatres, like *Forum Cinemas*, *Estinfilms*, *Lietuvos kinas*, etc.

In the future, the issue of the digitalization of film theatres will be topical and, in the case that regional and small film theatres will not have funding for such modernization, they will possibly shut down their business. On the other hand, international film theatre chains are more actively entering the Baltic market, and planning to open film theatres outside the capitals as well. Therefore, the studios that are able to distribute their films in these networks will have greater possibilities to screen films for a greater number of potential spectators.

Distribution of Films in Television

The distribution of films in television occurs in a co-operation between the studio and television channel; an example of such a co-operation is the broadcasting of the films produced by the studio *Cinevilla* on *LNT* (Latvia). Admittedly, the audience numbers of some of the films shown on TV outnumber twenty times the attendance in film theatres, achieving an approx. audience of 100 000 and higher. Showing a film on TV not only allows the local audiences to see it, but it also becomes available to the spectators around the world through satellite translation and internet television.

With the development of IPTV technology as a platform for the distribution of films, the service of *video*

on demand is also offered. For example, video rentals through *Lattelekom* interactive television allows for pay-per-viewing of local films as well; however, the offer currently consists mainly of films made by the studio *Cinevilla*. Also, Estonian *Elion* digital television offers video rental with a greater number of local films. A similar system also operates in Lithuania provided by the telecommunications operator *TEO*.

Distribution of Films on Data Carriers

Films are distributed on data carriers by both film studios and specialized distribution companies. Some studios make purchasing their films available by placing an order on their web sites, or by using other channels of communication. Wider choices for distribution are created in using services of specialized companies. Thus, for example, it is possible to buy a number of films produced in the Baltic States at stores, to which companies like the local branches of *Acme Films*, *Best Baltic*, etc., supply the products. Films can also be bought on internet stores.

Distribution of Films on the Internet

The global spread and accessibility of the Internet has made distributing and exhibiting films to a bigger number of spectators possible¹, simultaneously reducing the cost and time of distribution, thus also making global distribution of specific films targeted at a narrow group of spectators possible. Internet stores, where films on DVD or other data carriers can be purchased, is a way to distribute films. Several Internet stores operate in the Baltic States, either specializing in the sale of films or having wider choice of assortment.

On the other hand, the Internet offers wide possibilities for showing films both on different platforms, like mobile telephones, computers, etc, and making use of different kinds of broadcasting. One such kind of broadcasting is *video on demand* (a similar kind of service is *pay-per-view*), which ensures the possibility of watching a specific film for a definite period of time. According to

¹ It can be noted that, for example, the USA needed about twenty years to provide 85.8 million households with VCRs, but only five years to make the Internet available to 50 million households (Zhu, 2001).



the data of the *European Audiovisual Observatory*², at the end of 2008 there were more than 700 providers of *video on demand* in Europe, more than half of which used the Internet as a platform for providing the service. It should be taken into account that there is even a greater number of providers of such services as the fast-growing market of viewing videos on mobile phones was not examined in this research. So, for example, the Estonian mobile telephone operator, *Elisa*, offers a service *Elisa Mobiil TV* to its clients, allowing the viewing of different TV shows, animated films and other audiovisual products. Other mobile telephone operators in the Baltic States also offer similar services.

Film producers and studios are also engaged in film distribution, for example, a number of the films produced in Latvia and Lithuania are placed on the link ONLINE-FILM.org, where one can download films for a fee; the local sites of the link are operated by the studios, *Eho Filma* and *Tremora*.

The site *filmas.lv*, provided by the National Film Centre and *VA Kulturas informācijas sistema* will ensure accessibility to films in Latvia.

Impact of Digital Technologies on Production and Distribution

At the end of the 1990s and beginning of the 2000s, digital technology and formats have attained an even

greater importance. Episode II of *Star Wars, Attack of Clones*, was the first big budget film which was made using digital video cameras. In 2009, the Academy Award for best cinematography went to *Slumdog Millionaire*, a film which was largely made using digital video cameras. Consequently, it can be concluded that both the audiences and industry professionals have accepted films made this way. As experience shows, by using digital technology the total production cost of films can be reduced by up to 10%³. Accessibility to digital cameras and processing programmes, as well as their low costs, has favoured the development of independent cinema and the number of small budget films has increased drastically during the last ten years.

Also, digital format usage has made film distribution much convenient and effective; for example, the costs necessary for recording films to distribute them on DVD and other data carriers have decreased considerably. However, it has also prompted the illegal distribution of audiovisual products through the Internet, thus creating huge losses to the industry⁴. Thus, on one hand, the introduction of digital technology has considerably decreased film production costs, but, on the other hand, distribution in digital formats considerably reduces the profits.

² See: <http://www.obs.coe.int/about/oea/pr/vod2009.html>

³ See: <http://www.brightclub.com/multimedia/video/articles/78010.aspx#ixzz104HGSAHx>

⁴ See: <http://news.bbc.co.uk/2/hi/technology/8573162.stm>

2. NEW BUSINESS MODELS IN THE AUDIOVISUAL MEDIA SECTOR: OPPORTUNITIES IN THE BALTIC STATES

2.1. Existing and New Models of the Audiovisual Media Industry

Table 1 depicts the traditional value chain model in the film industry which consists of four stages, creating added value to every product on top of that created by the previous group. Thus, the idea and the development of the film arises in the preproduction stage, which has one value, but the final value of the film is established through the activities of distributors, film theatres, TV channels, DVD producers and agencies responsible for marketing campaigns. The first three activities stages creates the production costs of the film, the latter – its income, for example, production costs of the currently most profitable film in the world, *Avatar* by James Cameron, exceeded 240 million USD, but the profits, as a result of a successful strategy of distribution, sales and marketing, already exceeds 2.7 billion USD to date. This means that nowadays a film or other audiovisual product will be successful if a definite added value is created in all stages of the value chain of the film industry, from the idea of the film to the marketing campaign; accordingly, a film should have a corresponding budget. A similar value chain model also applies to the production of other audiovisual products. Historically the first three stages were created in one place, for example, Hollywood, London, or Bollywood.

At present the preproduction of the film can take place in L.A., shooting can take place in Brazil, special effects can be added in Sidney, editing done in London but the sound track produced in Mallorca (Pickard, 2008), thus we can speak about a **global** film industry value chain. On the other hand, practice shows that films with big budgets can be financially unsuccessful and, vice versa, films with small budgets can be financially very profitable. This illu-

minates important changes in film business models in the last decade, and the next paragraph will therefore survey the most essential grounds of these changes and the possibilities of development, as well as give some examples from the audiovisual media sector in the Baltic States.

Globalization of Film Production

Unification of legislation, liberalization of labour force, capital and movement of goods, modern means of communication and transport as well as creating an environment benevolent to foreign investments are the factors which favoured the globalization of both world economics and film production during the last ten to twenty years. More and more films from different countries are made not only in local settings, but anywhere in the world. This also applies to other stages of film production (editing, special effects, etc.) Every country has unique values which are able to attract film projects, but for that a service of corresponding quality is needed. To provide it, all capabilities and capacities of the local partners, from an effective system for receiving the necessary permits for shooting, a system of financial stimuli, and marketing directed at attracting projects at a regional or national level, are necessary.

Globalization of film production provides income not only for local studios that render film production services, but also creates added value in the export of services provided by the country. The stay of foreign production crews provides additional income to the tourism and other industries of a place both during the production and screening period of the film. For example, even forty years after shooting, the *Sound of Music* is able to attract

Table 1 / THE CLASSIC MODEL OF VALUE CHAINS IN THE FILM INDUSTRY COMPILED AFTER KRÄTKE, 2002

| Preproduction | Production | Postproduction | Distribution, sales |
|--|---|--|--|
| Scriptwriters | Hair stylists, make-up artists | Computer graphics, special effects | TV channels |
| Directors | Prop masters, set designers, costume artists | Editing of films | Film distributors |
| Producing of the film Producers Project managers | Production process | Soundtrack, sound effects, sound studio | Advertising and media agencies |
| Location agents | Photographers, lighting directors/cinematographers, sound directors/operators | Processing and multiplication copying of films | Film theatres, theatrical advertisements |
| Actors/agencies | Shooting equipment/utilities | Subtitles/dubbing of films | Distribution of DVD and other formats |
| Financing/insurance | Shooting pavilions | | |

around 300,000 tourists per year to Salzburg, Austria, at least 40,000 of which join the official *Sound of Music Tour* (Oxford Economics, 2007).

In 2010, *Film Angels Studio* provided film production service to several foreign projects. For example, the following films have been or soon will be shot in Riga: *Clouds above the Slope* (in coproduction with the Japanese *NKH*), *Iron Sky* (in coproduction with the Finnish *Blind Spot Pictures*), *Agent Vinod* (in coproduction with the Indian *Illuminati Films*) and *My Way* ((in coproduction with the South Korean company *The Directors*). Attracting such projects was possible, to a great extent, owing to efficient international activities of *Film Angels* and funding from the *Riga Film Fund*, which provides co-financing from 7 to 15% of the budget of the film spent on shooting in Riga or in its outskirts. The studio was engaged not only in attracting film projects but also in production, location scouting and set decoration, selection of local talent, catering on location, and other activities.

Development of Coproduction

As the research of the *European Audiovisual Observatory* shows, the number of coproduction projects in Europe has notably increased during the last decade. This is connected to several factors: creative coproduction, availability of bigger budgets, availability of bigger distribution markets, etc. (after N.Morawetz et al., 2007). According to the *European Convention on Cinematographic Coproduction*¹, to regard a national studio as a coproduction partner the studio has to ensure at least 10-20% of the total budget of the film. One of the benefits of coproduction is the possibility to provide a bigger distribution market (audiences in film theatres, purchasers of DVDs, etc.); it is facilitated not only by the distribution of the film in all of the countries involved in production, but also with the participation of actors, popular in these countries, in the film.

The aim of the Estonian film production studio *Amrion Production* is to produce high-quality coproduction feature and documentary films. Up to now the studio has already produced two coproduction feature films: *I Was Here* and *The Poll Diaries* (premiered on September 16, 2010 at the Toronto International Film Festival), which were made together with Finnish, German and Austrian film studios. The studio has also coproduced the Estonian-Latvian animated film *Lotte from Gadgetville*. At present the studio is working on 4 features and 2 documentary coproduction films in cooperation with film studios in Finland, France and Austria. Both national funding and financing from *Media Desk* and *Eurimages* is involved.

Production and Distribution of Derivative and Related Products

Merchandising of derivative and related products connected with films, like soundtracks of films, books,

toys representing the heroes of films, etc., is a customary practice all over the world. If previously a film or series appeared after a story from a book, and later computer games were created, like in the case with films about James Bond, then nowadays films and other products appear taking into account the popularity of some computer games. Film as a basic product, on the one hand, can arouse interest in derivative and related products, for example, T-shirts with heroes of films but, on the other hand, these products can arouse greater interest in the film itself. For example, listening to the soundtrack of a film bought on *iTunes* can create an interest in a film shown ten years ago. Distribution of such products can be so successful that merchandising of audiovisual products, based on an initial idea, can go on for decades, like in the cases with the film *Star Wars* or the series *Star Trek* (see Davidson, 2010).

The animation film *Lotte from the Gadgetville* from the Estonian studio, *Eesti Joonisfilm* and the Latvian animation studio, *Rija Films*, had its DVD published comprising of the film, a karaoke version of the songs, and a booklet with the lyrics and stills of the film. The film has its own interactive web site where one can watch its trailer, see the characters in the drawings and digitally colour them, listen to the soundtrack and do other activities. Also, the clothing company *Baltika Group* has created clothes and accessories connected with the film as well as toys, which were a popular Christmas present for children. There is a plan to create similar products after completing the sequel of the film, *Lotte and the Moonstone Secret*.

Active Involvement of Viewers and Users

With the increasing expansion and accessibility of the Internet as well as the diversity of its exploitation platforms, the significance of social portals and video viewing sites has rapidly grown during the last five years. These portals are more and more actively exploited not only for information about upcoming premieres (for, example, placing a trailer of a film in some of the most popular video viewing sites) but also for communication with the potential or existing viewer of the film or other audiovisual product. By using social portals it is possible to learn about the favourite films of the viewers and their friends, their viewing habits, comments about what they've viewed, recommendations and criticism, as well as actively involving them in creating the latest products.

Providing information about the production of a film, for example, in a blog or on social networks, demonstration of separate episodes, the possibility to get acquainted with the production process, participation in production and other activities arouses and sustains the viewers' interest about the upcoming film, and encourages them to go to film theatre or purchase the film on DVD.

More and more attention is paid to user (viewer) produced content. Thus, for example, producers of animation films announce a drawing competition for a possible character in the next film, later, everyone interested is allowed to

¹ http://www.coe.lv/konv_sar.php?kid=151

vote, thus arousing a sense of participation in the production of the film and the creative process. The British studio *Aardman Animations* is one of the architects of the portal of short animation films *Amations.tv* where everyone can place his or her short animation, participate in competitions, win prizes, communicate with other authors and get involved in other activities. Therefore the exchange of creative ideas takes place and new talents are found.

A series of commercials advertising the prepaid mobile telephone card *Zelta zivtina* were launched at the end of 2005, and at the moment it is the longest lasting advertising campaign in the history of Latvia. The number of episodes has already exceeded 150, and a tramcar has been furnished in the same way as the flat of the protagonists of the series. Producers of the commercials are actively involving viewers of the series and users of the prepaid card in the campaign. Thus, for example, in the spring of 2008, scouting for new characters for the series took place at higher education institutions both in Riga and in the outlying regions. Moreover, in the autumn of the same year a drawing competition was held to select works for a *Zelta zivtina* tunnel. The protagonists of the series are taking an active part in various public events and communicate through social networks like *Twitter*, *Facebook* and *draugiem.lv*.

Business Incubators and Creative Quarters

Business incubators, which can serve both as a programme of support activities and also provide the necessary premises for the activities, are created to support the implementation of new and innovative business ideas and establish companies. Often incubators are created close to higher education institutions and within the frames of science and technology parks to enable graduates to put into practice their business ideas and commercialise the results of research, but sometimes incubators can also be independent formations. Incubator programmes are funded by the state and local governments as well as companies interested in the implementation of new business ideas and products.

For example, in Leipzig in 2000 a new business incubator and technological centre, *Media City Leipzig*, was established, providing office, production and shooting premises to around 70 companies connected with the film and TV industries, employing around 700 people in total. This was one of the factors that stimulated significant development in the media industry in Leipzig, which is situated in the territory of the former German Democratic Republic. Till the unification of Germany, the media industry (except the printed press industry), held an insignificant place in the economics of the city (Bathelt, 2002).

Business incubators can be a part of creative quarters, for example, media towns. Such quarters can appear naturally, for example, when creative people start renting apartments and office premises in districts of towns where rent is lower, and they can also be created *artificially*, like *MediaCityUK*, which is in Salford, not far from Manches-

ter, and where a regional BBC centre has been built. Apart from the BBC, other media companies, film studios and university faculties plan to move to the location; real estate projects have also been developed².

All business incubators, creative quarters and media towns help to develop commercial activities, stimulate the appearance and introduction of innovation, improve the human habitat of the area, and contribute to affiliated industries, for example, the development of real estate. The above mentioned also stimulates the exchange of creative ideas and the emergence of inter-industry projects.

Riga Hub, launched in the end of 2009, is a creative industry incubator situated at Andrejsala. It is one of the incubators operating in the global network, *Hub World*, which at the moment unites incubators in 25 countries on four continents. The global network promotes the adoption of methods from other incubators, intercultural communication and global implementation of creative projects. *Riga Hub* offers services such as rent and maintenance of premises, administrative services, business management, marketing and sales consultations, etc. During the first year, the incubator will provide financial support up to 85% from total expenditures, and the average support for one company is from 6,000 to 9,000 Latvian lats per year.

Attraction of Private Funding

A number of possibilities of attracting private capital are known in the world. As a result, a private investor assigns funding for the production of an audiovisual product, receiving either direct or indirect gain from it, for example, indirect advertising of the investor's company or products in the form of *product placement*, exclusive rights to distribute the film, part of the income from the release, etc. Sometimes funding can also be assigned without material or other interests, for example, in support of the idea of the film which seems topical and appealing to the investor. Accordingly funding is attracted in the form of *crowd funding*, when financing for the implementation of a specific idea is publicly raised, involving large numbers of contributors; such fund-raising is usually organized on the Internet. The film *Demain la Veille* can be mentioned as an example for attracting such financing, where 50,000 USD for its production was raised within three weeks³. Similarly, there is also a system in which an investor lets everyone choose which projects should receive funding, and funding is then assigned to the project receiving the majority of votes.

Labiedarbi.lv is a project by *SMScredit.lv* where one can apply an idea or a project for financing, but beneficiaries of the financing are chosen by everyone interested who votes for any of the projects. The following film industry projects have received funding: the short films *The Discomfited* and *Behind the Wire*, as well as the portal of Baltic short films, *Balticshorts*. Project supporters are also se-

² See: <http://www.mediacityuk.co.uk/index.html>

³ See: <http://www.mediawave.tv/site/blogItem.cfm?item=248>

lected by actively communicating through various social portals, especially *draugiem.lv*.

Developments in the last decade in Internet use, the appearance of new distribution platforms, the development of digital technology and changes in viewers' choices, have resulted in the search for new business models not only in the Baltics, but also all over the world. Projects that have a film idea that is interesting and appealing to the audience, as well as a corresponding and focused marketing campaign are becoming more and more successful. Getting involved in international film projects, recognizing the wishes of viewers and involving viewers in film production as well as in the merchandising of derivative and related products, can bring about the two factors mentioned above. The target audience of the film and the audience's film-watching habits, ensuring that the film is shown on different platforms, should all be taken into account. Though the direction of such development is not yet very clear in the world, there are several possibilities which the Baltic film studios and other creators of audiovisual productions can and should exploit, both in making national films and joining the global film industry's value chain. Therefore, the next section will give recommendations and suggestions for development of new business models in the audiovisual sector in the Baltic States.

2.2. Recommendations for the Development of the Audiovisual Industry in the Baltic States

Taking into account the existing situation in the audiovisual sector in the Baltic States and the topical changes in business models and value chains examined beforehand, this section will give recommendations which could stimulate the development of the audiovisual sector in the Baltic States by making use of the possibilities created by the processes of globalization and the development of the Internet and new technology. Recommendations are addressed to three of the main participants of the sector: (1) makers and implementers of industry policy, (2) makers of education policy and educational establishments, and (3) creators of audiovisual products and audiovisual companies.

Recommendations to the Sector Policy Makers and Implementers

Policy planning documents, laws and legislation, which affect or directly influence the audiovisual sector, should accent the development of the latest distribution platforms, especially the platforms which favour the development of the distribution of national films, for example, IPTV (which provides transmission to a maximum number of viewers), internet *video on demand* solutions, mobile TV created by telecommunication operators, etc.

The distribution of audiovisual productions through such platforms should be developed together with organizations representing the makers of the productions, for example, professional associations, unions, etc. In signing

contracts on the allocation of state funding for the production of audiovisual works, where state funding exceeds 50% from the total budget (i.e., using taxpayers' money), it should be established that the products have to be distributed for free on platforms not meant for commercial usage, or created through the state's initiative, applying funding from the state's budget. This will increase the availability of audiovisual products made using taxpayers' money to the population.

In evaluating applications for state funding for the production of audiovisual works, not only the results of the run of the applicants' former productions in film theatres or in other public exhibition places, but also on other distribution platforms, especially commercial ones, should be taken into account.

In planning allocation of state funding for the production of audiovisual works – both for national and coproduction films – the quality of the project, the topicality of the story, and the planned marketing and communications campaign, should be evaluated.

Within limits of accessibility, state funding should be increased for the development of audiovisual arts study programmes and production of audiovisual works, thus ensuring financial opportunities in producing high-quality national and coproduction feature films, short films, student and experimental films, as well as developing new inter-industry products.

Co-operation on the Baltic level should be encouraged both in common film productions and in the development of a common distribution system, thus rousing the interest of both local and foreign audiences in Baltic films. A discernible brand of Baltic films should be promoted, for example, *Baltic Films*, thus popularizing the films made in the Baltic States and widening the territory of their distribution.

Recommendations to the Education Policy Makers and Educational Establishments

Educational and research policy should be targeted at co-operation and reciprocity with the audiovisual sector and other creative industries, the development of innovations and a creative industries business incubator, etc. support programmes for the implementation of business ideas, which will encourage not only the professionalism of the graduates of audiovisual art study programmes and the emergence of new companies, but also the development of interdisciplinary projects and the introduction of creative solutions in other industries as well.

Educational institutions have to develop study programmes in English and other widely-used international languages, which will both ensure the global competitiveness of local students and attract students from abroad, thus stimulating the export of educational services. By facilitating the export of educational services and increasing the competitiveness of graduates in the international market, the possibilities for potential international copro-

duction in the creative sector will increase.

Interdisciplinary study programmes targeted at the integration of different sectors should be established, for example, by integrating study courses of art, information technologies and marketing, and creating, for example, an international programme for computer game art and management. Such study programmes should be established in close cooperation with industry companies, for example, animation studios, business incubators and science and technology parks, as well as with industry professionals.

Recommendations to Creators of Audiovisual Products and Companies

The animation industry can be regarded as one of the most perspective audiovisual sectors in the Baltic States. Audiences from all over the world can understand the *language* of a short animation film, therefore the possibility for global distribution of such a film, including on new platforms, increases. Animation films are the easiest to include in *cross-media* projects – in film form, computer games, multimedia projects and web pages, and also in distributing these products using various distribution platforms.

Film studios should be getting more involved in co-production projects. This, on the one hand, enables attracting bigger funding for the film's budget and, on the other hand, ensures better distribution results. As well, *national film stories* can be integrated into *international film stories*, for example, in the context of the mutual history of two neighbouring countries.

To attract private investors' funding to film projects, possibilities such as *product placement*, *crowd funding*, and other up-to-date means of attracting of funding should be exploited more extensively.

Digital technology, the spread of the Internet, and new kinds of distribution provide options for commercially successful niche products such as marginal films or films targeted at a particular audience. Consequently, the development of film studios targeting their activities towards the creation of such niche products is possible.

To facilitate film distribution, it's possible for film studios to implement combined projects both to distribute films on DVD format and in using digital distribution platforms, for example, the Internet.

To achieve good distribution results it is not enough for a film to have an interesting and appealing idea; it is also necessary to have a focused and corresponding marketing campaign and involvement of the potential viewers in the film production process, thus creating a *story* about the process of making a film for the viewer. It is possible to make use of free social communication sites for this purpose: social portals, blog sites and video uploading and viewing portals. Viewer created content should also be exploited, making the viewer feel his or her presence in the creative process of film production.

In planning infrastructure development of one of the lead players of the audiovisual sector, for example, state television, it should be in context with the development of a media town, and foreseeing a place for the creators of other media products: the faculties of higher education institutions, media sector business incubators and residential buildings. Thus, not only a milieu for creative process, the development of innovation and the implementation of interdisciplinary projects would be created, but a strong brand (for example, Riga Media City), would also be created. One that is able to attract big film and other audiovisual products, as well as internationally recognizable creative personalities to the city and the region. It is recommended to implement such projects by means of public and private partnership.

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Internet resources

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OFFER OF AUDIOVISUAL MEDIA SECTOR STUDY PROGRAMMES IN **ESTONIA**

| Study programme | Language of studies | Duration of studies (semesters) | Tuition charge (EUR) |
|---|---------------------|---------------------------------|----------------------|
| Bachelor level programmes | | | |
| BALTIC FILM AND MEDIA SCHOOL/TALLINN UNIVERSITY (TALLINN) | | | |
| Films and video | Estonian | 6 | 2530* |
| TV and audiovisual media | English | 6 | 3000* |
| TARTU KÕRGEN KUNSTIKOOL (TARTU) | | | |
| Media and advertisement design | Estonian | 6 | N/A |
| EESTI KUNSTIAKADEEMIA (TALLINN) | | | |
| Animation | Estonian | 6 | 1875* |
| Master level programmes | | | |
| BALTIC FILM AND MEDIA SCHOOL/TALLINN UNIVERSITY (TALLINN) | | | |
| TV and documentary films | Estonian | 4 | 2375* |
| Video and film art | English | 4 | 3000* |
| EESTI KUNSTIAKADEEMIA (TALLINN) | | | |
| Animation | English | 4 | 4000* |
| Animation | Estonian | 4 | 4000* |
| Interactive multimedia | Estonian | 4 | 1875* |

* Subsidized study places are available (full scholarship amount)

OFFER OF AUDIOVISUAL MEDIA SECTOR STUDY PROGRAMMES IN **LATVIA**

| Study programme | Language of studies | Duration of studies (semesters) | Tuition charge (EUR) |
|---|---------------------------|---------------------------------|----------------------|
| Bachelor level programmes | | | |
| RIGA INTERNATIONAL SCHOOL OF ECONOMICS AND BUSINESS ADMINISTRATION (RIGA) | | | |
| Audiovisual media art | Latvian, Russian, English | 8 | 2095 |
| INTERNATIONAL HIGHER SCHOOL OF PRACTICAL PSYCHOLOGY (RIGA) | | | |
| Audiovisual art | Latvian, Russian | 8 | 2240 |
| LATVIAN ACADEMY OF CULTURE (RIGA) | | | |
| Theory of audiovisual and dramatic art | Latvian | 8 | 1540* |
| Art of TV and video photography | | | N/A** |
| Film direction | | | N/A** |
| Theatre, film and TV drama | | | N/A** |
| LATVIAN ACADEMY OF ART (RIGA) | | | |
| Audiovisual media art | Latvian | 8 | 0*** |
| RIGA STRADINS UNIVERSITY (RIGA) | | | |
| Multimedia communication | Latvian | 6 | 1610 |
| LIEPAJA UNIVERSITY (LIEPAJA) | | | |
| New media art | Latvian | 6 | 1720* |
| Master level programmes | | | |
| RIGA INTERNATIONAL SCHOOL OF ECONOMICS AND BUSINESS ADMINISTRATION (RIGA) | | | |
| Audiovisual media art | Latvian, Russian, English | 4 | 4195 |
| LATVIAN ACADEMY OF CULTURE (RIGA) | | | |
| Audiovisual art | Latvian | 4 | N/A** |
| LATVIAN ACADEMY OF ART (RIGA) | | | |
| Audiovisual media art | Latvian | 4 | 0*** |
| LIEPAJA UNIVERSITY (LIEPAJA) | | | |
| New media art | Latvian | 4 | 1860* |

* Subsidized study places are available (full scholarship amount) ** No enrolment in 2010 *** Only state budget places
NOTE: Private higher educational establishments marked in blue

OFFER OF AUDIOVISUAL MEDIA SECTOR STUDY PROGRAMMES IN **LITHUANIA**

| Study programme | Language of studies | Duration of studies (semesters) | Tuition charge (EUR) |
|---|----------------------|---------------------------------|----------------------|
| College level programmes | | | |
| SIAURĖS LIETUVOS KOLEGIJA (SIAULIAI) | | | |
| Multimedia technologies | Lithuanian | 6 | 1075 |
| KAUNO KOLEGIJA (KAUNAS) | | | |
| Multimedia technologies | Lithuanian | 6 | 1330 |
| Bachelor level programmes | | | |
| EUROPEAN HUMANITIES UNIVERSITY (VILNIUS) | | | |
| Media and visual design | Belorussian, Russian | 8 | 1500 (1200*) |
| VILNIUS ACADEMY OF ARTS (VILNIUS) | | | |
| Animation | Lithuanian | 8 | 0 ** |
| Photography and media art | | | |
| THE LITHUANIAN ACADEMY OF MUSIC AND THEATRE | | | |
| Audiovisual media art | Lithuanian | 4 | 0*** |
| Cinematography | Lithuanian | 8 | 0*** |
| Film studies | | | |
| Film, theatre and music management | | | |
| Script writing | | | |
| Sound direction | | | |
| TV direction | | | |
| VILNIUS GEDIMINAS TECHNICAL UNIVERSITY | | | |
| Creative industries | Lithuanian | 8 | 0** |
| VYTAUTAS MAGNUS UNIVERSITY | | | |
| New media art | Lithuanian | 8 | 3145 |
| KAUNAS UNIVERSITY OF TECHNOLOGY | | | |
| Music technologies | Lithuanian | 8 | 0** |
| SIAULIAI UNIVERSITY (SIAULIAI) | | | |
| Audiovisual art | Lithuanian | 8 | 0** |
| Master level programmes | | | |
| VILNIUS ACADEMY OF ARTS (VILNIUS) | | | |
| Photography and media art | Lithuanian | 4 | 0** |
| THE LITHUANIAN ACADEMY OF MUSIC AND THEATRE | | | |
| Cinematography | Lithuanian | 4 | 0** |
| Film, theatre and music management | | | |
| Sound direction | | | |
| TV direction | | | |
| KAUNAS UNIVERSITY OF TECHNOLOGY | | | |
| Media philosophy | Lithuanian | 4 | 0** |

* Discounts to Belorussian citizens and permanent residents * Only state budget places

NOTE: Private higher educational establishments marked in blue

Sources:Baltic Film and Media School –
<http://www.bfm.ee/web>Estonian Academy of Arts –
http://www.artun.ee/index.php?main_id=127&lang=engLatvian Academy of Culture –
<http://www.lka.edu.lv/>Latvian Academy of Art –
<http://www.lma.lv/>Riga International School of Economics
and Business Administration –
<http://rsebaa.lv>International Higher School of
Practical Psychology –
<http://www.spaa.lv/lv/operators.html>Liepaja University Art Research
Laboratory – <http://www.mplab.lv/index.php?lapa=izglitiba>The Lithuanian Academy of Music and
Theatre – <http://www.lmta.lt/english/>Vilnius Academy of Art –
<http://www.vda.lt/index.php/pageid/810>Vilnius Gediminas Technical University
programme „Creative Industries“ - <http://www.creative-industries.lt/index.html>European Humanities University –
http://www.ehu.lt/education/undergraduate_studies/academic_programs/0013812<http://www.smartestonia.ee/index.php?page=89><http://www.aiknc.lv/lv>http://www.aikos.smm.lt/aikos/higher_education_programmes.htm

FULL LENGTH FILM PRODUCTION IN **ESTONIA**

| Production companies | Number of full length films (2005-2007) | Number of coproductions |
|-------------------------------|---|-------------------------|
| Exitfilm | 7 | 3 |
| Allfilm | 4 | 2 |
| Kuukulgur Film | 4 | 2 |
| Amrion | 3 | 1 |
| Ruut | 3 | |
| Taska Film | 3 | |
| Acuba Film | 2 | 1 |
| Homeless Bob Production | 2 | 1 |
| AdOculus Film | 1 | |
| Eero Talvistu* | 1 | |
| Eesti Joonisfilm | 1 | 1 |
| Eesti Kultuurfilm | 1 | |
| Estinfilm | 1 | 1 |
| Filmivabrik | 1 | |
| Film Line | 1 | |
| Film Tower Kuubis | 1 | 1 |
| F-Seitse | 1 | |
| InRuum | 1 | |
| Kaos World Studios | 1 | |
| Luxfilm | 1 | |
| Myth Film | 1 | |
| Northern Broadcasting Network | 1 | |
| Profilm | 1 | |
| Revolver Film | 1 | |
| Shop of Dreams | 1 | 1 |
| Vitamin K Film | 1 | |
| TOTAL: | 27 | 14 |

* Individually produced film

FULL LENGTH FILM PRODUCTION IN **LATVIA**

| Production companies | Number of full length films (2005-2007) | Number of coproductions |
|-----------------------------|---|-------------------------|
| Latsfilma | 3 | 1 |
| Kaupo Filma | 3 | 2 |
| Screen Vision | 3 | 2 |
| Platforma filma (Cinevilla) | 2 | |
| Ego Media | 2 | 1 |
| Vides filmu studija | 2 | 1 |
| ABOOM | 1 | 1 |
| Anša Epnera studija AVE | 1 | |
| AR Teta | 1 | |
| A Film Latvia | 1 | 1 |
| Studija Centurms | 1 | 1 |
| Fa Filma | 1 | |
| Film Angels Studio | 1 | |
| F.O.R.M.A. | 1 | 1 |
| Ģilde | 1 | |
| Jānis Rutmanis* | 1 | |
| Juris Podnieks Studio | 1 | 1 |
| Kompānija Hargla | 1 | |
| Labvakar | 1 | |
| Miks Ozoliņš* | 1 | |
| Red Cats Film Studio | 1 | |
| Riga Motion Pictures Studio | 1 | |
| Rija Films | 1 | 1 |
| Studija 2 | 1 | |
| Studija Trīs | 1 | |
| Vides projekti | 1 | |
| TOTAL: | 26 | 13 |

* Individually produced film



FULL LENGHT FICTION FILM PRODUCTION
IN **LITHUANIA**

| Production companies | Number of full length films (2005-2007) | Number of coproductions |
|--------------------------|---|-------------------------|
| Uljanos Kim Studio | 3 | 2 |
| Tremora | 3 | 1 |
| Ketvirta versija | 2 | |
| Periferija | 2 | |
| Studija 2 | 2 | |
| Lieuvos kino studija | 1 | 1 |
| A Propos | 1 | |
| Artbox | 1 | |
| Baltijos filmu grupe | 1 | 1 |
| Kinema Group | 1 | 1 |
| Lieuvos televizija | 1 | |
| Mindoza Films Production | 1 | |
| Pavloff Entertainment | 1 | |
| Rain Studio | 1 | |
| Robertas Sarknickas* | 1 | |
| Seansas | 1 | 1 |
| TOTAL: | 16 | 7 |

* Individually produced film

BUSINESS MODELS AND VALUE CHAINS IN AUDIOVISUAL MEDIA



Sources:

Facts & Figures 2009/Baltic Films

Facts & Figures 2008/Baltic Films

Facts & Figures 2007/Baltic Films

<http://www.efsa.ee>

<http://www.nfc.lv/lmdb/index/>

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NOTE: Studios that have produced full length animation films are marked in red in all the charts

AUDIOVISUAL MEDIA COMPANIES IN THE BALTIC COUNTRIES

1. Audiovisual Media Companies in **Estonia**

| NAME | MAIN ACTIVITIES | INFO | | | |
|-----------------------------|--|--|----------------|---------------------------|-----------------------|
| | | ADDRESS | PHONE | E-MAIL | WEB |
| Production Companies | | | | | |
| AA VISIOON STUUDIO | Documentaries Services TV production | Gonsiori 27, Tallinn 10147, Estonia | +372 628 4170 | info@aavs.ee | www.aavs.ee |
| ACUBA FILM | Documentaries Feature films | Tartu mnt 80, Tallinn 10112, Estonia | +372 566 46725 | arko@acuba.ee | www.acuba.ee |
| AD OCULOS FILM | TV production Documentaries | Läänekaare 40-2, Tallinn 11611, Estonia | +372 677 0505 | peeter.brambat@neti.ee | www.filmestonia.ee |
| A FILM EESTI | Animation Services | Lootuse pst 62, Tallinn 11616, Estonia | +372 670 6485 | afilm@afilm.ee | www.afilm.ee |
| ALASTI KINO | Documentaries Services | Toom-Kooli 21b-9, Tallinn, Estonia | +372 527 7432 | info@alastikino.ee | www.alastikino.ee |
| ALLFILM | Documentaries Feature films Services | Saue 11, Tallinn 10612, Estonia | +372 672 9070 | allfilm@allfilm.ee | www.allfilm.ee |
| AMRION | Documenaries Feature films | Nurme 45, Tallinn 11616, Estonia | +372 677 6363 | info@amrion.ee | www.amrion.ee |
| AVERAGE MONKEY FILM | Documentaries Feature films Services | | +372 518 9854 | riin@averagemonkey.com | www.averagemonkey.com |
| BALTIC FILM PRODUCTION | Documentaries Feature films | P.O.Box 4752 13517 Tallinn, Estonia | +372 502 7509 | info@bfp.ee | www.bfp.ee |
| CUMULUS PROJEKT | Documentaries | Köleri 32-2, Tallinn 10150, Estonia | +372 601 5401 | iho@tpu.ee | www.efsa.ee |
| DOWNTOWN PICTURES | Feature films Services | Ahtri 12, Tallinn 10151, Estonia | +372 611 6669 | jaan@downtown.ee | www.downtown.ee |
| EESTI JOONISFILM | Animation | Roo 9, Tallinn 10611, Estonia | +372 6774 1228 | info@joonisfilm.ee | www.joonisfilm.ee |
| EESTI KULTUURFILM | Documentaries | Narva mnt 7a, Tallinn 10117, Estonia | +372 504 8748 | juhan.aare@mail.ee | www.kultuurfilm.ee |
| ESTINFILM | Documentaries Feature films | Gonsiori 27, Tallinn 10147, Estonia | +372 5558 3279 | mati.sepping@estinfilm.ee | www.estinfilm.ee |

BUSINESS MODELS AND VALUE CHAINS IN AUDIOVISUAL MEDIA

| NAME | MAIN ACTIVITIES | INFO | | | |
|---|---|--|----------------|----------------------------|-----------------------|
| | | ADDRESS | PHONE | E-MAIL | WEB |
| EETRIÜKSUS (RUUT) | Documentaries Feature films | Roopa 10-14, Tallinn 10136, Estonia | +372 502 1989 | artur@talvik.ee | www.ruut.com |
| ESTONIA FILM | Documentaries | Katleri 11-33, Tallinn 13915, Estonia | +372 633 8948 | igorruus@hotmail.ee | www.efsa.ee |
| EXITFILM | Documentaries Feature films Services | Madala 1, Tallinn 10313, Estonia | +372 661 1005 | exitfilm@exitfilm.ee | www.exitfilm.ee |
| FILMIMEES | TV production Documentaries Services | Kloostri tee 8, Tallinn 11911, Estonia | +372 605 5222 | filmimees@filmimees.ee | www.filmimees.ee |
| FILMISTUUDIO SEE | Documentaries Feature films | Uus 3, Tallinn 10111, Estonia | +372 655 6362 | filmistuudio@hotmail.ee | www.efsa.ee |
| FILMIVABRIK | Documentaries TV production | Kunderi 8, Tallinn 10121, Estonia | +372 642 6228 | filmivabrik@filmivabrik.ee | www.efsa.ee |
| FILM TOWER KUUBIS | Feature films Documentaries Services | Gonsiori 27, Tallinn 10147, Estonia | +372 628 4090 | margus@filmtower.ee | www.filmtower.ee |
| FREYJA FILM | Documentaries Feature films | Regati pst 8, Tallinn 11911, Estonia | +372 623 7116 | freyjafilm@hotmail.ee | www.freyjafilms.com |
| F-SEITSE | Documentaries Feature films Services | Koidu 17, Tallinn 10137 Estonia | +372 601 5983 | fseitse@fseitse.ee | www.fseitse.ee |
| GAVIAFILM | Documentaries | Koidu 80 Tallinn 10139, Estonia | +372 634 0221 | gaviafilm@hotmail.ee | www.gaviafilm.ee |
| IKOON | Documentaries TV production Services | Välja tee 9, Suurupi, Harku vald, 76906 Hrjumaa, Estonia | +372 50 72 656 | vahur.laiapea@eki.ee | www.efsa.ee |
| KAIRIIN | Documentaries | Sõpruse pst 175-53, Tallinn 13413, Estonia | +372 652 0182 | yyri.sillart@mail.ee | www.efsa.ee |
| KOPLI KINOKOMPANI | Documentaries Feature films TV production | Gonsiori 21, Tallinn, Estonia | +372 55664877 | kaspar@kinokompanii.ee | www.kinokompanii.ee |
| KUUKULGUR FILM | Documentaries Feature films Services | Niine 11, 10414 Tallinn, Estonia | +372 617 7060 | info@kuukulgur.ee | www.kuukulgur.ee |
| LEGE ARTIS FILM | Documentaries Feature films | Randvere tee 118, Tallinn 11913, Estonia | +372 623 7113 | enda.lehtmets@mail.ee | www.legeartisfilm.com |
| LUXFILM | Documentaries Feature films | Joa tn. 2, Tallinn 10127, Estonia | +372 5559 5847 | luxfilm@luxfilm.ee | www.luxfilm.ee |
| MAURUM | Documentaries Services | Pärna 3, Tallinn 10128, Estonia | +372 600 9939 | info@maurum.ee | www.maurum.ee |
| METEORIIT | Documentaries Feature films | Kapi 5-17, 10414 Tallinn, Estonia | +372 5825 8962 | aet@meteoriiit.ee | www.efsa.ee |
| MINOR FILM | Documentaries Services | Trummi 34B, Tallinn 12617, Estonia | +372 5648 8901 | dorian@infonet.ee | www.efsa.ee |
| MP DOC | Documentaries | Pärnaõie tee 3 11914 Tallinn, Estonia | +372 520 0874 | liivon@gmail.com | www.efsa.ee |
| MYTH FILM | Documentaries Services | Uus 3, Tallinn 10111, Estonia | +372 507 6234 | mythfilm@hotmail.ee | www.efsa.ee |
| NORTHERN BROADCASTING NETWORK / TESTFILM | Documentaries TV production Services | Pärnu mnt 139C, Tallinn 11317, Estonia | +372 650 9481 | nbn@nbn.ee | www.nbn.ee |

| NAME | MAIN ACTIVITIES | INFO | | | |
|------------------------------|---|--|----------------|--------------------------|-----------------------------|
| | | ADDRESS | PHONE | E-MAIL | WEB |
| NUKUFILM | Animation | Niine 11, Tallinn 10410, Estonia | +372 641 4307 | nukufilm@nukufilm.ee | www.nukufilm.ee |
| ORBITAL VOX STUDIOS | Sound facilities Commercials | Jakobsoni 14, 4. k., Tallinn 10128, Estonia | +372 5600 9958 | orbital@orbital.ee | www.orbital.ee |
| POLARFILM | Documentaries | Künkamaa 10, Tallinn 13516, Estonia | +372 609 9459 | polarfilm@gmail.com | www.efsa.ee |
| PROFILM | Documentaries | Pk 3181 Tallinn 10505, Estonia | +372 505 6691 | paasu@hot.ee | www.efsa.ee |
| RAAMAT FILM | Documentaries | Mutionu 14, Valkla, Kuusalu vald Harju mk 74604, Estonia | +372 525 6339 | raamath@online.ee | www.efsa.ee |
| RAO HEIDMETSATA FILMISTUUDIO | Documentaries Feature films | Müürivahe 31, Tallinn 10140, Estonia | +372 502 4906 | info@rhfilm.ee | www.rhfilm.ee |
| REEDE | Documentaries TV production | Weizenbergi 8/2, Tallinn 10150, Estonia | +372 507 7898 | info@reede.tv | www.efsa.ee |
| REVOLVER FILM | Documentaries Feature films Commercials Services | Kunderi 31-7, Tallinn 10121, Estonia | +372 631 4530 | revolver@revolver.ee | www.revolver.ee |
| REMSUFILM | Documentaries | Endla 17-26, 10122 Tallinn, Estonia | +372 646 0537 | oremsu@hot.ee | www.efsa.ee |
| RUDOLF KONIMOIS FILM | Commercials | Rävala 11-12, Tallinn, 10143, Estonia | +372 5627 2727 | kaido@rudolf.ee | www.rudolf.ee |
| RÜHM PLUS NULL | Documentaries Feature films | Gonsiori 21, Tallinn 10147, Estonia | +372 611 4265 | film@plussnull.ee | www.plussnull.ee |
| SILMVIBURLANEI | Documentaries | Ristiku 15-8, 10612 Tallinn, Estonia | +372 5648 4693 | ylo@joonisfilm.ee | www.efsa.ee |
| STUDIO TRISTAN | Documentaries | Gonsiori 27, Tallinn 10147, Estonia | +372 628 4766 | tristan@tristan.ee | www.tristan.ee |
| TASKA PRODUCTIONS | Feature films | Weizenbergi 2-10, Tallinn 10150, Estonia | +372 520 3000 | film@@taska.ee | www.taska.ee |
| TRAUMFABRIKI | Documentaries | | +372 565 1560 | kiur.aarma@neti.ee | www.efsa.ee |
| TUIISK FILM PRODUCTION | Feature films | Rävala 6, Tallinn 10143, Estonia | +372 681 4682 | tuisk@tuisk.ee | www.filmestonia.ee |
| WEIKO SAAWA FILM | Documentaries | Nikolai 15-4, Pärnu 80014, Estonia | +372 44 3077 | docfest@chaplin.ee | www.chaplin.ee |
| VESILIND | Documentaries | Tartu mnt. 51-17 Tallinn 10115, Estonia | +372 600 9972 | riho.vastrik@vesilind.ee | www.vesilind.ee |
| WELCOME ENTERTAINMENT | Services | Kristeni 1, Tallinn 13516, Estonia | +372 5690 8043 | welcome@quicksummer.com | www.welcome.quicksummer.com |

| NAME | MAIN ACTIVITIES | INFO | | | |
|-----------------------|---|--|----------------|-----------------|-----------------|
| | | ADDRESS | PHONE | E-MAIL | WEB |
| TV Channels | | | | | |
| ETV (PUBLIC TV) | News, current affairs, culture, sports and general entertainment, documentaries | Gonsiori 27, Tallinn, Estonia | +3726284100 | etv@etv.ee | www.err.ee |
| ETV 2 (PUBLIC TV) | General entertainment, sports and news | Gonsiori 27, Tallinn, Estonia | +372 628 4100 | etv2@err.ee | www.err.ee/etv2 |
| KANAL 2 (PRIVATE TV) | News, current affairs and general entertainment. | Maakri 23A 10145 Tallinn Estonia | +372 666 2450 | info@kanal2.ee | www.kanal2.ee |
| KANAL 11 (PRIVATE TV) | General entertainment | Maakri 23 a, 10145 Tallinn, Estonia | +372 666 2450 | info@kanal11.ee | www.kanal11.ee |
| TV3 (PRIVATE TV) | News, current affairs and general entertainment channel | Peterburi tee 81, 11415 Tallinn, Estonia | + 372 622 0200 | tv3@tv3.ee | www.tv3.ee |
| TV3+ (PRIVATE TV) | News, current affairs and general entertainment channel (in Russian) | Peterburi tee 81, 11415 Tallinn, Estonia | + 372 622 0200 | 3plus@tv3.ee | www.3plus.ee |
| TV6 (PRIVATE TV) | General entertainment channel | Peterburi tee 81, 11415 Tallinn, Estonia | + 372 622 0200 | Tv6@tv3.ee | www.tv6.e |



AUDIOVISUAL MEDIA COMPANIES IN THE BALTIC COUNTRIES

2. Audiovisual Media Companies in **Latvia**

| NAME | MAIN ACTIVITIES | INFO | | | |
|---------------------------------|---|--|----------------|----------------------|------------------------|
| | | ADDRESS | PHONE | E-MAIL | WEB |
| Production Companies | | | | | |
| AVANTIS PROMO | Documentaries Other Audiovisual Works&Events | Mēness 4, Rīga LV1013, Latvia | +371 6731 7464 | ilona@avantis.lv | www.avantis.lv |
| ANIMĀCIJAS BRIGĀDE | Animation | Šmerļa 3, Rīga LV1006, Latvia | +371 6752 0770 | ab.studija@apollo.lv | www.latfilma.lv |
| ANSIS EPNERS FILM STUDIO AVE | Documentaries | Miera 39-27, Rīga LV1001, Latvia | +371 6737 0087 | ave@deponet.lv | www.latfilma.lv/ave |
| ATOM ART | Animation Commercials | Tērbatas 49/51-12, Rīga LV1011, Latvia | +371 6761 2709 | sabine@atomart.lv | www.atomart.lv |
| BALTI | Documentaries | Skaistkalnes 1, Rīga LV1004, Latvia | +371 6780 4160 | info@balti.lv | www.balti.lv |
| BALTIC PINE FILMS | Commercials | Maskavas 4, Rīga LV1050, Latvia | +371 6788 8504 | info@balticfilms.com | www.balticfilms.com |
| A.BLEY FILM STUDIO | Animation Documentaries | Salaspils 12/2-9, Rīga LV1057, Latvia | +371 2204 0066 | aija@bley.lv | www.bley.lv |
| DD STUDIO | Multimedia Video Games | 11. novembra krastmala 35-306, Rīga LV1050, Latvia | +371 6720 5366 | dd@dd.lv | www.dd.lv |
| EGO MEDIA | Documentaries Features | Baznīcas 8-20, Rīga LV1010, Latvia | +371 6729 1720 | guntis@egomedia.lv | www.egomedia.lv |
| ELM MEDIA | Documentaries Other Audiovisual Products | Ganību dambis 15-47, Rīga LV1045, Latvia | +371 2836 6800 | elmmedia@elmmedia.lv | www.elmmedia.lv |
| FA FILMA | Features Documentaries | Brūņinieku 22-7, Rīga LV1001, Latvia | +371 2699 5300 | fafilma@fafilma.lv | www.fafilma.lv |
| FILM ANGELS STUDIO | Features Commercials Filming Facilities/ Locations | Kr. Valdemāra 33-10a, Rīga LV1010, Latvia | +371 6733 1921 | studio@angels.lv | www.angels.lv |
| FILM STUDIO DEVIŅI | Documentaries Features Filming&Editing Facilities | Šmerļa 3, Office 326, Rīga LV1006, Latvia | +371 6724 1688 | devini@parks.lv | www.latfilma.lv/devini |

BUSINESS MODELS AND VALUE CHAINS IN AUDIOVISUAL MEDIA

| NAME | MAIN ACTIVITIES | INFO | | | |
|--------------------------|--|--|----------------|--|--------------------------|
| | | ADDRESS | PHONE | E-MAIL | WEB |
| FILM STUDIO ĢILDE | Documentaries | Amatu 5, Rīga LV1941, Latvia | +371 6721 0022 | pipars@mailbox.riga.lv | www.gilde.lv |
| FILM STUDIO TANKA | Features | Stabu 94-11, Rīga LV1009, Latvia | +371 2615 6356 | alise@tanka.lv | www.latfilma |
| HANSA MEDIA | Documentaries TV programs Other Audiovisual Works | Lāčplēša 36-1, Rīga LV1011, Latvia | +371 6721 7092 | info@hansamedia.lv | www.hansamedia.lv |
| HARGLA COMPANY | Features Documentaries | Valtaiku 19, Rīga LV1029, Latvia | +371 2923 5618 | laila.pakalnina@inbox.lv | www.latfilma.lv |
| HERZ FRANK FILM STUDIO | Documentaries | Kr.Valdemāra 18-1, Rīga LV1010, Latvia | +371 6724 2611 | herzfrank@yahoo.com | www.latfilma.lv/c/frank/ |
| JET MEDIA | Animation | Deglava 40-1, Rīga LV1035, Latvia | +371 2649 5024 | info@jetmedia.lv | www.jetmedia.lv |
| JURA PODNIEKA STUDIJA | Documentaries Animation Features Filming/Post Production Facilities | Citadeles 2, Rīga LV1010, Latvia | +371 67216967 | jps@jps.lv | www.jps.lv |
| KAUPO FILMA | Features Documentaries Location scouting | Elizabetes 49, Rīga LV1010, Latvia | +371 6721 7722 | kaupo@inbox.lv | www.latfilma.lv/kaupo |
| KINOLATS | Documentaries Other Audiovisual Activities | Kapseļu 38, Rīga LV1046, Latvia | +371 2644 0907 | art.is@apollo.lv | www.ilonabruvere.com |
| KLIPI FILMU DARBNĪCA | Documentaries Commercials Other Audiovisual Activities | Eduarda Smilģa 52-11, Rīga LV1002, Latvia | +371 2648 0909 | kfd@kfd.lv | www.nfc.lv |
| KRUKFILMS | Features | Kalnciema 1a-11, Rīga LV1048, Latvia | +371 220 51060 | info@krukfilms.com | www.krukfilms.com |
| LATSFILMA, FENIXFILM | Documentaries Features | A.Čaka 33-43, Rīga LV1011, Latvia | +371 2947 5390 | latsfilma@one.lv | www.kurpazudiselvis.lv |
| LOCOMOTIVE PRODUCTIONS | Documentaries Features Filming Facilities | Bruņinieku 28-57, Rīga LV1011, Latvia | +371 2929 8667 | office@locomotive.lv | www.locomotive.lv |
| LUNOHOD ANIMATION STUDIO | Animation | Šmerļa 3, Rīga LV1006, Latvia | +371 6743 6013 | vl@lunohod.lv | www.lunohod.lv |
| MISTRUS MEDIA | Documentaries | Blaumaņa 11/13-12, Rīga LV1011, Latvia | +371 6731 3314 | birojs@mistrusmedia.lv | www.mistrusmedia.lv |
| N2/VILKS | Commercials | Šmerļa 3, Rīga LV1006, Latvia | +3716721 4141 | info@vilks.com | www.vilks.com |
| NIDA FILMA | Feature Films | Vidus 3-10a, Rīga LV1050, Latvia | +371 2929 6914 | office@nidafilma.lv | www.nidafilma.lv |
| NOMADI | Documentaries Other Audiovisual Works | Lapu 6-46, Ogre LV5001, Latvia | +371 2963 7192 | kristaburane@inbox.lv | |
| PLATFORMA | Features | Dzintaru pr. 19, Jūrmala LV2015, Latvia | +371 2722 2009 | alina.sikstule-talarova@ platforma.lv | www.cinevilla.lv |
| RĪGAS KINOSTUDIJA | Production & Stages | Šmerļa 3, Rīga LV1006, Latvia | +371 6779 0303 | office@studio.lv | www.studio.lv |
| RIJA FILMS | Animation Distribution Sound facilities | Mēness 4, Rīga LV1013, Latvia | +371 6736 2656 | info@rijafilms.lv | www.rijafilms.lv |

| NAME | MAIN ACTIVITIES | INFO | | | |
|----------------------|---|---|----------------|-------------------------------------|------------------------|
| | | ADDRESS | PHONE | E-MAIL | WEB |
| SCREEN VISION | Documentaries Features | Antonijas 15-29, Riga LV1010, Latvia | +371 2929 3688 | laima@screenvision.lv | www.screenvision.lv |
| STYLE MASTERS STUDIO | Commercials | Citadeles12, Riga LV1010, Latvia | +371 6781 4241 | sms@stylemasters.lv | www.stylemasters.lv |
| STUDIJA CENTRUMS | Documentaries Features Other Audiovisual Projects | Alberta 7-8, Riga LV1010, Latvia | +371 2945 7957 | bruno.ascuks@ studijacentrums.lv | www.studijacentrums.lv |
| SIBĪRIJAS BĒRNI | Documentaries | Graudu 41A, Riga LV1058, Latvia | +371 6762 9960 | dzintrag@inbox.lv | www.sibirijasberni.lv |
| STUDIJA 2 | Documentaries | K.Barona 10-7, Riga LV1050, Latvia | +371 2911 1007 | zelma.vidina@adverbun.lv | www.latfilma.lv |
| STUDIO F.O.R.M.A. | Features | Avotu 8-29, Riga LV1011, Latvia | +371 6728 7300 | s.forma@studioforma.lv | www.studioforma.lv |
| SUBJEKTIV FILMA | Documentaries Features | M.Nometņu 12, Riga LV 1002, Latvia | +371 2929 9564 | subjektivfilma@inbox.lv | www.35mm.lv |
| URGA | Animation | Annas 2, Riga LV1001, Latvia | +371 2910 7124 | vieturs@2annas.lv | www.2annas.lv |
| VIDES FILMU STUDIJA | Documentaries TV programmes Filming&Editing Facilities | Lapu 17, Riga LV1002, Latvia | +371 6750 3588 | vfs@vfs.lv | www.vfs.lv |

TV Channels

| | | | | | |
|-------------------|---|---|----------------|-------------|------------|
| LTV 1 (Public TV) | News, current affairs, culture, sports and general entertainment, documentaries | Zaķusalas krastmala 3, Riga LV1509, Latvia | +371 6720 0314 | info@ltv.lv | www.ltv.lv |
| LTV 7 (Public TV) | Sports, general entertainment | Zaķusalas krastmala 3, Riga LV1050, Latvia | +371 6720 0824 | info@ltv.lv | www.ltv.lv |
| LNT (Private TV) | News, current affairs, culture, sports and general entertainment, rarely documentaries | Elijas 17-3.st., Riga LV1050, Latvia | +371 6707 0200 | lnt@lnt.lv | www.lnt.lv |
| TV3 (Private TV) | News, current affairs, culture, sports and general entertainment, documentaries | Dzelzavas 120g-3.st., Riga LV1021, Latvia | +371 6747 9100 | tv3@tv3.lv | www.tv3.lv |
| TV5 (Private TV) | News, current affairs, culture general entertainment, | Elijas 17-3, Riga LV1050, Latvia | +371 6707 0200 | tv5@yv5.lv | www.tv5.lv |

Filming in Latvia, Baltic Pine Films



AUDIOVISUAL MEDIA COMPANIES IN THE BALTIC COUNTRIES

3. Audiovisual Media Companies in **Lithuania**

| NAME | MAIN ACTIVITIES | INFO | | | |
|-----------------------------|---|--|-----------------------------------|-------------------------------------|-----------------|
| | | ADDRESS | PHONE | E-MAIL | WEB |
| Production Companies | | | | | |
| ANIMACIJOS STUDIJA | Animation | Kalvariju 196-58, Vilnius LT-2057, Lithuania | +370 5231 5105 | aselenis@takas.lt | www.lfc.lt |
| A PROPOS | Documentaries Features | Nugalėtojų g. 3D-2, LT-2016 Vilnius, Lithuania | +370 5233 0688 | apropos@takas.lt lvytas@takas.lt | www.lfc.lt |
| ALGIRDAS TARVYDAS STUDIO | Documentaries | Apkasy g. 35-29, LT-2042 Vilnius, Lithuania | +370 698 82544 +370 5272 13 98 | atarvydas@takas.lt | www.lfc.lt |
| ART BOX | Features Shorts TV Commercials | Nemencines pl. 4 LT-10102 Vilnius, Lithuania | +370 5264 3054 | info@artbox.lt | www.artbox.lt |
| ARTETA | Features TV Series Services | Tarandės g. 34, 14013 Vilnius, Lithuania | +370 5240 3263 | projects@arteta.lt | www.arteta.lt |
| BALTIC FILM GROUP | Features | V. Grubo g. 38, LT-10318, Vilnius, Lithuania | +370 5210 1500 | info@bfg.lt | www.bfg.lt |
| BALTIC FILM SERVICES | Filming Services for Film and TV production | Naugarduko g. 3, LT-01141 Vilnius, Lithuania | +370 5276 2335 | info@bfs.eu.com | www.bfs.eu.com |
| CINEVERA | Lease of professional shooting and lighting equipment | Paupio g. 33a, LT-2014 Vilnius, Lithuania | +370 5264 3645 | cinevera@cinevera.lt | www.cinevera.lt |
| CINEMARK | | S. Konarskio g. 49, LT-08117 Vilnius, Lithuania | +370 5212 3802 | cinemark@cinemark.lt | www.cinemark.lt |
| CONCEPT EVENTS & MEDIA | Documentaries Features TV Production Commercials Other Audiovisual Works | Smolensko 10, LT-03201 Vilnius, Lithuania | +370 5233 3930 | t.zibliene@concept.lt | www.concept.lt |
| DAGETA | Audio and Video Facilities Blu Ray | Apkasy g. 31-25, LT-2042 Vilnius, Lithuania | +370 5272 1475 | | www.lfc.lt |
| DIDŽIŲJŲ MOTINŲ STUDIJA | | Mykolo Marcinkevičiaus g. 29-14, Vilnius, Lithuania | +370 6996 4808 | juzenas@takas.lt | www.lfc.lt |
| DOKUMENTIKA | | Apkasy g. 35-29., Vilnius, Lithuania | | | www.lfc.lt |

BUSINESS MODELS AND VALUE CHAINS IN AUDIOVISUAL MEDIA

| NAME | MAIN ACTIVITIES | INFO | | | |
|-----------------------|--|--|-----------------|--|------------------------------|
| | | ADDRESS | PHONE | E-MAIL | WEB |
| ERA FILM | Documentaries | K.Ladygos 1-119 LT-09001, Vilnius, Lithuania | +370 5278 8187 | info@erafilm.lt | info@erafilm.lt |
| FILM FOCUS | | S. Konarskio g. 28-10, LT-2674 Vilnius, Lithuania | +370 5213 1886 | arvid@takas.lt | www.lfc.lt |
| GAUMINA | Multimedia | Goštauto 40B, Vilnius, LT01112, Lithuania | +370 5269 1655 | info@gaumina.lt | www.gaumina.lt |
| KOPA | Documentaries | A/d 2581, LT-2009 Vilnius, Lithuania | +370 523 1317 | berkopa@hotmail.co | www.lfc.lt |
| FLUXUS LINEA | Documentaries | Antakalnio g. 92-28, LT-2040 Vilnius, Lithuania | +370 5216 1846 | flux@one.lt | www.lfc.lt |
| FRALITA FILMS | Documentaries Features TV Production | Šv. Ignoto g. 5, LT-01120 Vilnius, Lithuania | +370 6433 0022 | zivile.gallego@fralita.com | www.fralitafilms.com |
| JUST A MOMENT | | Švyturio g. 23-25, Vilnius, Lithuania | +370 6868 8980 | dagne@justamoment. | www.justamoment.lt |
| IDEE FIXE | Commercials | T. Švečenkos g. 16A, LT-03111 Vilnius, Lithuania | +370 5233 3336 | studio@ideefixe.lt | www.ideefixe.lt |
| KETVIRTA VERSIJA | Documentaries | Vytauto 32/15, LT-08122 Vilnius, Lithuania | +370 6874 7634 | versija4@yahoo.com | www.lfc.lt |
| KINO KOMANDA | Facilities Commercials Features | Liubarto g. 23, LT-08117 Vilnius, Lithuania | +370 526 3728 | komanda@kinokomanda.lt | www.kinokomanda.lt |
| KINO ALJANSAS | | Ozo g. 4, LT-08200 Vilnius, Lithuania | +370 6164 5643 | info@kino.lt | www.kino.lt |
| KINO KONTORA | | A. Goštauto g. 2 / A. Jakšto g. 15, Vilnius, LT-01105, Lithuania | +370 5212 3113 | kinoprojektai@inbox.lt | www.lfc.lt |
| KINEMA | Documentaries Features | Grybautojų g. 30, LT-2000 Vilnius, Lithuania | +370 5277 0148 | kinema2000@takas.lt | www.lfc.lt |
| KIVIS | Commercials Features | Vytenio g. 50-801, 03229 Vilnius, Lithuania | +370 5233 1533 | mailto:lola@kivis.com | www.kivis.com |
| LELIUMA | Documentaries | Ateities g. 15, LT-2057 Vilnius, Lithuania | +370 5 2763 680 | karusele@takas.lt | www.lfc.lt |
| LIETUVOS KINO STUDIJA | Services Features Commercials | Nemenčinės pl. 4, LT-2016 Vilnius, Lithuania | +370 5276 3444 | info@lfs.lt | www.lfs.lt |
| MA NO FILMS | Features | Medeinos g. 1-36, LT-06142, Vilnius, Lithuania | +370 6983 9383 | giedriuszubavicius@ yahoo.com | www.manofilms.lt |
| MONOKLIS | Documentaries Feature Short Films | Kęstučio 55-7, LT-08124 Vilnius, Lithuania | +370 687 90681 | info@monoklis.lt | www.monoklis.lt |
| MULTIMEDIA MARK | Multimedia | Maciulevičiaus 51, Vilnius, LT04310, Lithuania | +370 5245 8859 | info@multimediamark.lt | www.multimediamark.lt |
| PERIFERIJA | Documentaries | Žirmūnų g. 12-8, LT-2051 Vilnius, Lithuania | +370 5261 4816 | | |
| PAVLOFF ENTERTAINMENT | | J. Basanavičiaus g. 7, LT-01118 Vilnius, Lithuania | +370 5212 7737 | lithuania@ pavloffentertainment.com | www.pavloffentertainment.com |
| SEANSAS | Documentaries | Technikos g. 9, LT-3031 Kaunas, Lithuania | +370 3735 0393 | seansas@takas.lt, | www.lfc.lt |

| NAME | MAIN ACTIVITIES | INFO | | | |
|---|---|---|----------------------------------|-------------------------|-------------------|
| | | ADDRESS | PHONE | E-MAIL | WEB |
| SPATIUM | | Vokiečių g. 28/17-21, LT-2001 Vilnius, Lithuania | +370 5212 1866 | marius@vinita.lt | www.lfc.lt |
| STUDIO NOMINUM | Documentaries Features Other Audiovisual Works | A.Gostauto 2/15, Vilnius LT 01104, Lithuania | +370 5212 3113 | grupe1@nominum.lt | www.nominum.lt |
| STUDIO 2 | Features | S. Konarskio g. 49, LT-03123 Vilnius, Lithuania | +370 5205 6055 | studija2000@takas.lt | www.lfc.lt |
| STUDIO 2000 | Documentaries Short Films Features | Nemecines pl 4, LT-10102, Vilnius, Lithuania | +370 5276 8909 | studija2000@takas.lt | www.lfc.lt |
| STUDIO DAUMANTAS | | Nemenčinės pl. 4-202, LT-2057 Vilnius, Lithuania | +370 5276 8909 | | www.lfc.lt |
| STUDIO JU | Features Dokumentaries TV Programmes Commercials | Verkių g. 32, LT-08221, Vilnius, Lithuania | +370 6822 3949 | info@studijaju.com | www.studijaju.com |
| TELEDOKUMENTIKA | Documentaries | Taikos g. 13-21, LT-2017 Vilnius, Lithuania | +370 5242 6395 | tedo@post.5ci.lt | www.lfc.lt |
| TOMAS DONELA STUDIO | Short fiction | Viršuliškių g. 87-24, LT-2056 Vilnius, Lithuania | +370 6139 9280 | tomasdonela@hotmail.com | www.lfc.lt |
| TREMORA | Features Commercials Distribution | Pakalnės 13-2, LT-01112, Vilnius, Lithuania | +370 6869 7584 | ieva@tremora.com | www.tremora.lt |
| ULJANA KIM STUDIO | Features Documentaries Distribution | Antakalnio g. 94-25, LT-2040 Vilnius, Lithuania | +370 5234 7060 +370 6992 6552 | kim@lfc.lt | www.lfc.lt |
| VAIZDO PRODUKCIJOS NAMAI FREAKY PRODUCTION HOUSE | | Filaretų g. 73a, LT-2007 Vilnius, Lithuania | +370 6565 4910 | bruno@freaky.lt | www.lfc.lt |
| VIDEOIDĖJA | Films Facilities | S. Konarskio g. 49, LT-03123 Vilnius, Lithuania | +370 5233 4366 | algirdastv@centras.lt | www.lfc.lt |

TV Channels

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|--------------------------------------|---|--|------------------|----------------|---------------|
| LIETUVOS TELEVIZIJA (PUBLIC TV) | News, current affairs, culture, sports and general entertainment, documentaries | S.Konarskio 49 LT-03123 Vilnius, Lithuania | +370 5236 3209 | lrt@lrt.lt | www.lrt.lt |
| LIETUVOS TELEVIZIJA 2 (PUBLIC TV) | General entertainment, | S.Konarskio 49 LT-03123 Vilnius, Lithuania | +370 5236 3209 | lrt@lrt.lt | www.lrt.lt |
| TV1 (PRIVATE) | News, current affairs, culture, sports and general entertainment, | Kalvarijų g. 143, LT-08221 Vilnius, Lithuania | +370 85 243 1058 | info@tv1.lt | www.tv1.lt |
| TV3 (PRIVATE) | News, current affairs, culture, sports and general entertainment, | Kalvarijų g. 143, LT-08221 Vilnius, Lithuania | +370 85 203 0101 | info@tv3.lt | www.tv3.lt |
| LNK (PRIVATE) | News, current affairs, culture, sports and general entertainment, | Šeškinės g. 20, LT-07156 Vilnius, Lithuania | +370 5243 1058 | info@lnk.lt | www.lnk.lt |
| BALTIJOS TELEVIZIJA (PRIVATE) | News, current affairs, culture, sports and general entertainment, | Laisvės pr. 60 LT-05120 Vilnius, Lithuania | +370 5278 0844 | info@btv.lt | www.btv.lt |
| LIETUVOS RYTAS TV (PRIVATE) | News, current affairs, culture, sports and general entertainment, | Gedimino 12A, LT-01103 Vilnius, Lithuania | | news@lrytas.lt | www.lrytas.lt |

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