UNIC Annual Report 2011/2012

UNIC
Union Internationale des Cinémas
International Union of Cinemas


LE SAINT

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Title page: Rex, Benfeld, Photo ADRC Ph. Gras
opposite: Le Saint Germain des Prés, Paris, © Photo Marion

1. INTERVIEW WITH UNIC PRESIDENT AD J WESTSTRATE

UNIC's opening in Brussels, October 2011

From your perspective, what has been the most significant event for the European exhibition community in the past year?

Ad J. Weststrate: Although it happened with little fanfare, the point at which digital screens became a majority in the world – we passed 50% in January 2012 – undoubtedly represented a key tipping point for everyone. This is both exciting news and a reminder to those who have not yet taken action that time to do so is running out. Once we have overcome the financial and logistical difficulties of the roll-out, the cultural, social and economic legacy of digitisation will remain a key issue for our industry for years to come.

Would you therefore say that the glass is half-full and not half-empty?

By the time people read this interview, it will probably be three-quarters full – if not more! Cinema exhibition is going through an exciting phase of innovation and renewal. Digital technology offers audiences great new content and opens up to cinemas a myriad of business opportunities, if we get the digital roll-out right. However, cinemas are also reinventing themselves outside of the auditorium. Just think about the innovations we are seeing in relation to social media and smart phone apps, all helping exhibitors to further engage with their audiences. Many cinemas have enthusiastically embraced these new digital opportunities and some are now starting to reap the rewards of these investments.

Did the market's performance in 2011 reflect that investment?

The results are there to see in the annual report. In truth, the picture remained mixed, with 2011 seeing many positive but also some less positive results across all UNIC territories. The economic downturn certainly played a role in some places. But generally, European cinema exhibition remained the most stable and profitable version market of the film industry, reflecting the fact that we remain the most affordable entertainment outside the home.

Russian box office continued to grow

significantly as did the Turkish market. In the European Union, France did extraordinarily well – also thanks to its great local films. So did Norway – which, by the way, was the first European (and UNIC) territory to become 100 per cent digital in 2011. And the Netherlands, my home country, also had an extraordinary year, hopefully joining the exclusive club of those who are fully digital some time in 2012.

So, the future is rosy and there are no concerns about where things are going?

Not at all. It remains true of course that cinema exhibitors continue to face significant challenges. We must ensure that not just policy-makers and the general public, but also colleagues from other parts of the industry, understand that we all benefit from a healthy and sustainable theatrical exploitation window. That is not always easy given the sometimes skewed perceptions and un-evidenced discussions that exist in relation to the future of the film business. Theatrical exhibition on average creates 10–15 times more value per title than Video on Demand – including catch-up TV – but you would be forgiven for thinking the latter was the more important sector given the attention it receives! Moreover, the proliferation of so many diverse film theatres across Europe is a real cultural achievement. If we lose cinemas, we lose cultural hubs that provide their local communities with a significant creative resource for development. And artistically speaking, cinema remains the 'gold standard' environment for films. Most creative people behind a film set out wanting their work to be seen on the big screen, in front of an audience that enjoys the experience together. UNIC believes that it is worth fighting for the cinema as a unique place of entertainment that cannot be compared with other film platforms.

Other key concerns, such as film theft, rights payments to collecting societies, and of course digital roll-out or digital cinema standards also keep us alert. There has never been more of a need for those working in the cinema sector to stand together to defend our industry and to convince consumers and politicians of the cultural, economic and social benefits our sector contributes.

And where is UNIC in all of this?

I hope – and genuinely believe – that the answer to that is that UNIC is now standing at the forefront of those efforts. It remains early days, but I am confident that the ambitious programme of reform instigated by UNIC members in 2011, which saw our association headquarters relocating from Paris to Brussels, the hiring of a new chief executive supported by an executive team, and our getting much more involved in the political process at European level, is already bearing fruit. I think what is documented in this year's annual report certainly shows that we have stepped up to the challenges we face. UNIC is cementing its position as a respected player in the film industry, one that collaborates effectively with partners across the film value chain but is also not afraid to speak up for its members when required. We have strengthened our relations with film industry representatives and governments across Europe. We have also reached out further to North America where we are collaborating closely with our sister organisation the National Association of Theatre Owners and our partners at the US studios. UNIC is on an incredibly exciting upward trajectory and I would like to thank all my colleagues from UNIC for the tremendous support they have shown in enabling us to re-launch UNIC in 2011/2012.

2.
KEY FIGURES

Olympia, Dijon, © Photo Ava du Parc

2.1
Cinema-going in 2011

	Box-office 2011 (mio.)	Box-office change 2011/10 (%)	Admissions 2011 (mio.)	Admissions change 2011/10 (%)
Austria	127,3	-2,30	16,8	-2,89
Belgium	–	–	22,8	+7,5
Denmark	100,9	-6,1	12,4	-4,1
Finland	65,9	-0,15	7,2	-4,76
France	1362	+4,37	215,6	+4,51
Germany	958,1	+4,1	129,6	+2,3
Ireland	111,8	-3,87	16,3	-0,61
Italy	661,5	-9,98	101,3	-7,83
Luxembourg	9,4	+6,82	1,3	+8,33
Netherlands	239,9	+8,6	30,5	+7,5
Norway	138	+9	11,6	+5,8
Russia	872,8	+18,21	162	-2,11
Spain	630,1	-3,80	95,6	-4,40
Sweden	177,2	+7,59	16,4	+3,80
Switzerland	195,6	+0,77	15,2	+2,01
Turkey	170,2	-11,72	42,3	+0,66
UK	1250	+6,56	171,6	+1,1

Source: UNIC members

After a year of mixed results in 2010, box office results and cinema attendance in UNIC territories were mostly positive in 2011. Strong local films contributed to these results, as well as the added value that digital cinema brought to the cinema-going experience.

Gross box office increased in nine UNIC territories, a slightly higher number than in 2010. Russian box office grew by an impressive 18 per cent, with the second strongest box-office growth recorded in Norway (9 per cent).

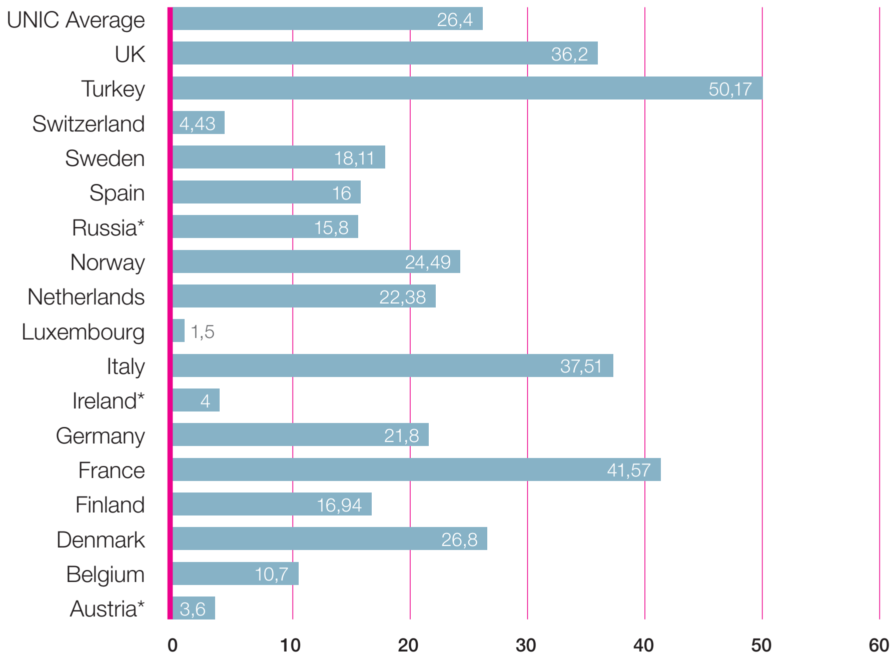
Germany, the Netherlands and Luxembourg registered significant admissions growth, closely followed by France, Norway and Sweden. French admissions reached their highest level since 1966 and Dutch admissions since 1978.

By contrast, Italy, Finland and Spain saw attendances fall. Italian box office fell despite strong local films, due to the impact of the economic and financial crisis.

By comparison, on the other side of the Atlantic, US box office fell to a 16-year low, revenues falling by 3,5 per cent. Chinese box office on the other hand rose by 29 per cent due mainly to the proliferation of new cinema screens.

2.2
Local Films' Market Share

Local films' market share 2011 (%)



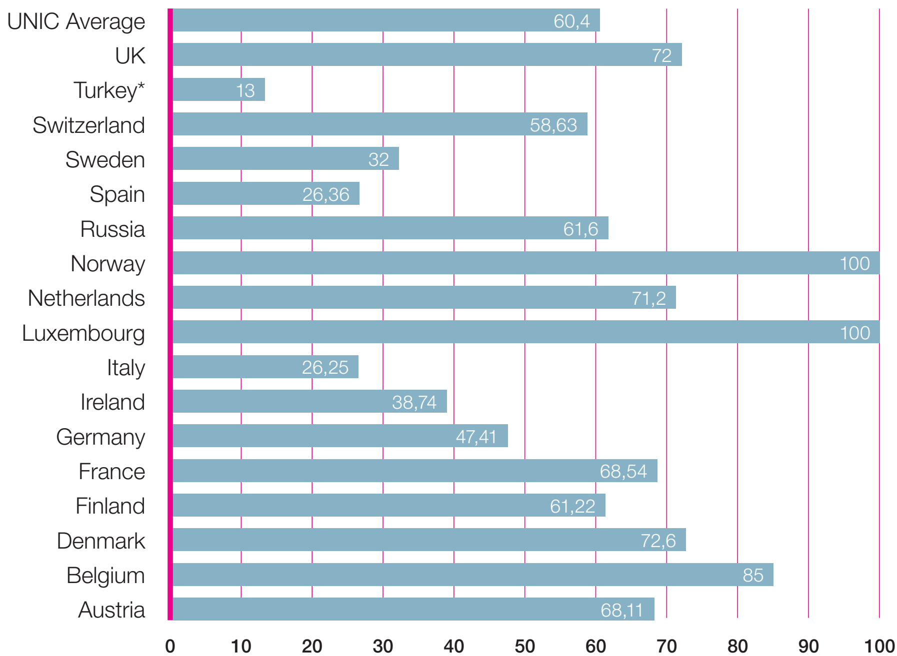
Source: UNIC members (*EAO Market Trends 2012)

Alongside strong local film shares, studio films continued to create significant revenues for exhibitors in 2011. 3D film revenue remained relatively constant.

In many territories, admissions growth was related to strong local films. This was particularly the case in Turkey, despite a slight decrease compared to 2011, followed by France, where the market share increased to 41,6 per cent. National market share increased in six further territories, led by Italy, the UK and Denmark.

2.3
54 Per Cent of European Screens Digitized by the End of 2011

Digital rollout 2011 (%)



Source: UNIC members (*EAO Market Trends 2012)

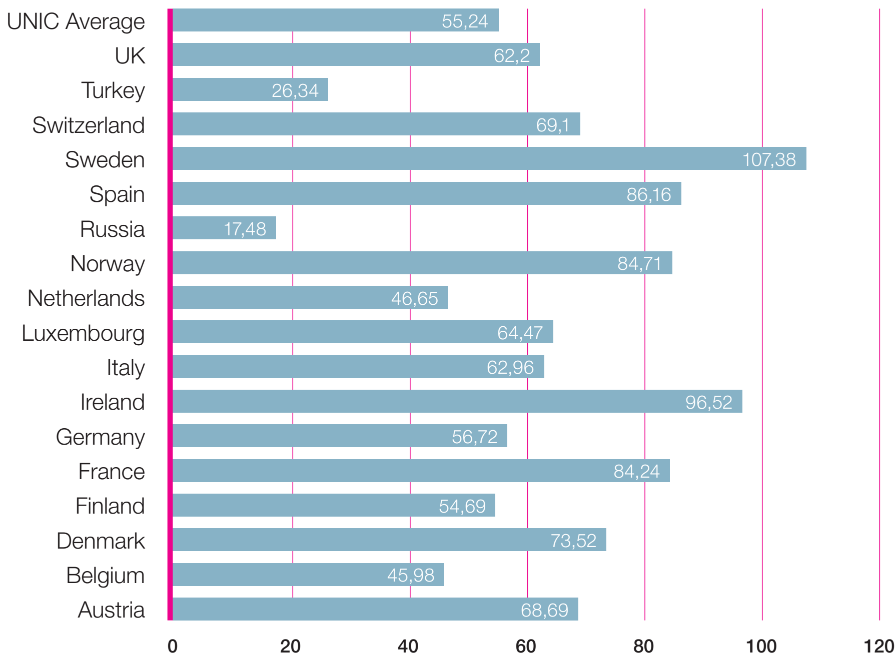
Digital roll-out accelerated in 2011, reaching 54 per cent of European (and 60,4 per cent of UNIC) screens. Norway was the first country to reach full digitisation, followed a few weeks later by Luxembourg.

Most of the larger cinema circuits have already converted their screens or are in the process of doing so. As a result, they are benefiting from the innovations in content, efficiencies, flexibilities and economies of scale that come with digital conversion.

Smaller exhibitors, especially single screen theatres, on the other hand, still struggle to fund conversion of their sites to digital cinema in many UNIC territories. If this situation continues, Europe risks losing many of these smaller operators. This would have severe social and cultural implications.

2.4
Cinema Screen Density

Nº of screens per million inhabitants



Source: UNIC members

Cinema screen density varies widely across UNIC territories. On average, there are about 55 screens for every million inhabitants. The screen landscape is particularly dense in Sweden with 107 screens, closely followed by Ireland (97).

At the other side of the spectrum, Russia only possesses 17 screens for every million, followed by Turkey with 26 screens. Within the EU, only the Netherlands and Belgium are below the UNIC average (NL: 47 screens, BE: 26 screens per million capita).

Empire Leicester Square, London, National Schools Film Week 2011

3. KEY ISSUES FOR EXHIBITION

Ciné Quai, Saint Dizier, © Photo ADRC Philippe Maillot

3.1 Putting Cinemas at the Centre of the Digital Entertainment Landscape

At a time when the international film industry faces accelerating technological and economic change, the key issue for any exhibitors' association is to safeguard and influence conditions so that theatre owners are supported in continuing to provide an unparalleled offer of films and alternative content to their audiences. Exhibitors have over recent years made significant investments to the benefit of cinema-going audiences. They require economic and regulatory stability to recoup these in the future.

In this context, UNIC's advocacy work – further outlined below – is based on the following principles:

- Creative content, its production, distribution and exhibition, are all essential to European cultural diversity, economic growth, employment, innovation and social cohesion;
- Entrepreneurship in the film industry needs to be rewarded and promoted;
- Cinemas constitute a crucial social and cultural hub for local and regional communities, enabling people to share experiences together;
- High-quality and diverse cinematographic arts and entertainment contribute meaningfully to cultural and social understanding and preserve diversity. They shape our identities and value systems and are an integral part of our cultural heritage;
- Exclusivity, contractual freedom, copyright (and the protection thereof) are fundamental principles on which our pluralistic and competitive European media sector is built.

3.2 Latest Developments Concerning Digital Cinema Roll-Out

Approximately 54 per cent of worldwide screens and 60,4 per cent of UNIC screens are now digital. In 2011, Norway was the first country to reach near to complete digitisation, shortly followed by Luxembourg. Other countries will follow in 2012, including Belgium (approx. 90 per cent in May 2012), the UK (end of 2011: 72 per cent), Denmark (72 per cent), France and the Netherlands (69 per cent).

Those operators that have achieved or are in the process of managing digital conversion will be able to offer audiences a much-enhanced cinema experience. However, those that are not considering going digital or struggling to find the resources to do so stand the risk of being marginalised by the economies of scope and scale provided by d-cinema and d-distribution. This may have severe social and cultural impacts in the medium and long term. Smaller cinemas, especially single screen sites and those that do not benefit from any financial support – market-based or not – will be threatened most.

Digital roll-out is in general financed either by market based-solutions or through government support. The most common

Disney 3D London, National Schools Film Week 2011

financing mechanism is a Virtual Print Fee (VPF) paid by content suppliers. As VPFs were originally designed for larger operators, their use to fund the wider roll-out presents a considerable challenge. UNIC calls upon distributors, integrators and exhibitors to ensure that the process is managed at all times so as to protect a diverse cinema offer. UNIC encourages collaboration between cinema operators of all sizes in that this has proven to be fruitful in terms of managing to secure the largest number of cinemas signed up to joint VPF deals. In Norway, Film & Kino, the national cinema organisation, has coordinated the digital conversion and signed agreements with all the distributors. All cinemas in Norway were digitised by July 2011. The actual installation of the digital equipment in the cinemas was done by third party subcontractors. In the UK, the Netherlands, Belgium, Luxembourg and France, for instance, third party integrators have successfully closed deals with groups of small and medium-sized cinemas.

Given the costs and risks that digital conversion represents for exhibitors, UNIC has set out the following conditions regarding transition to an all-digital exhibition environment:

- A strong commitment from distributors to financially support conversion costs for theatres;
- Inter-operability of all new technologies and services;
- Absolute and sole programming discretion for exhibitors (films, advertisements, trailers);
- Ensuring diversity of cinema theatres and film product; and
- Respecting territoriality and cultural and economic preferences within the internal market.

Within these conditions UNIC recognises each territory's specificity. Public authorities should remain free to support digital roll-out while preventing potential distortions of competition between theatres. For instance, regi-

Vue Hull 3D, MWPF

onal authorities in Belgium support small and art-house cinemas, whereas in Switzerland support is aimed at theatres with a diverse programming. In Sweden, digitisation of smaller operators is supported by a government fund, while in Finland the Finnish Film Foundation allocates lottery funds. In Denmark support comes from a mix of foundations, public shares and local councils. In Luxembourg, small cinemas have been supported by government in order to enable them to join a VPF scheme. By contrast the UK has managed to secure a market-driven deal for a collective of small and medium-sized cinemas from both the commercial and art-house sectors. Finally, in France, the Centre National du Cinéma et de l'Image Animée specifically supports cinemas with 1 to 3 screens.

UNIC also welcomes the European MEDIA support scheme, which in 2011 co-funded the digitisation of 100 screens across Europe. It calls upon the European Commission to continue its crucial support for this transition.

UNIC is aware that some cinema operators have demanded a lower standard for digital cinema in Europe in the belief that this could potentially help smaller cinemas to cope with digital conversion. UNIC however continues to support the globally-accepted DCI standard, which reflects the important place of European exhibitors in the worldwide market. The announcement of lower-cost but still DCI-compliant projectors from various manufacturers in April 2012 underlines that the DCI standard remains the appropriate standard for all cinemas.

Bergakungen Sweden

3.3
Film Theft

Recent developments in some EU Member States, in Brussels and also in the US illustrate that more needs to be done to promote and protect the interests of creative content sectors and of the film industry in particular. It is vital that cinema exhibitors become even more involved with this challenge.

Every year, the film industry suffers massive losses from films being recorded in cinemas, copied from legal content or shared online. Producing a film is an expensive and high-risk enterprise and piracy discourages investments in potentially successful film projects, threatening not only job opportunities but also cultural diversity in Europe. For the same reasons it also seriously limits the commercial attractiveness of, for example, VOD offers.

For cinemas that have made significant investments into providing high-quality entertainment to their audiences, it is impossible to compete against an illegal "free" offer of films online. If film theft continues at its current levels, the market dynamics on which the pluralistic and independent European media industries are based will simply no longer work and many jobs in the industry will be lost.

Preventing individuals from recording films in the theatre is a key priority of UNIC's members. In this context, UNIC circulates weekly European camcording reports to exhibitors, exhibitor federations and partners, making them aware of the ever-changing picture when it comes to local film theft 'hot spots'. Within the theatres, staff training has been upgraded and convictions of camcorders have continued across the continent. To give an example of the scope of incidents and the impact of increased efforts to tackle them, more than one camcording incident is prevented every week in the UK thanks to the theatres' commitment.

With regard to copyright enforcement at European and national levels, UNIC is actively striving to ensure more effective and efficient implementation of EU copyright rules as well as further harmonisation of the rules that apply in some Member States. Key amongst our demands are that intermediaries such as Internet Service Providers (ISPs) and telecommunications companies take more responsibility for protecting the creative content they distribute and profit from. Those that encourage or participate in film theft should be held responsible for the impacts of their behaviour. Finally, UNIC strongly supports moves to ensure that filmed content, which is illegally available on the Internet is taken down quickly and by all available means.

However, important though it is, these actions alone will not be sufficient to overcome the currently unacceptable levels of film theft. Furthermore, in some countries, public awareness campaigns have contributed to improving attitudes towards the value of film and cinemas. What is needed are more of these campaigns, aimed especially at children and young people, and emphasising the essential contributions that copyright makes to creativity and cultural content production. Similarly, the social, cultural and economic damage that film theft causes needs to be better articulated. UNIC offers its assistance and help to all those that seek to design and implement such campaigns.

This becomes all the more important at a time where the fight against film theft is increasingly subject to public debate. In Spain for instance, the government issued the country's first law against piracy last January and experienced high media coverage of the issue. In Denmark, during general elections in September, the Danish graduated response system was heavily debated. These debates were also preceded with some important case law. Finally, across several UNIC territories, lawsuits against illegal platforms such as the Pirate Bay are still pending.

To combat film theft, all creative content stakeholders, consumers, citizens and the public sector need to work together as well as collaborate with telecommunications and Internet companies, to tackle the problem, to explain its impacts and to draw attention to the wealth of legal content that is available not just in cinemas but on all other legitimate platforms. To this end, UNIC works closely with a variety of governmental and non-governmental organisations in Brussels, promoting a culturally diverse and economically competitive creative content sector.

3.4
Smart Release Strategies for Films

Releasing a film according to a sophisticated release schedule is vital for the film industry, as it allows the sector to maximise returns at each step of the value chain. It therefore encourages investment in potentially successful films and protects jobs and cultural diversity in Europe. For the industry, the goal is to increase the overall returns of films from all formats (cinemas, DVD and BluRay, VOD, pay-TV, free-TV, etc.).

Such maximisation of value is particularly important to film because cinema is a high-risk industry. Companies crucially depend on recouping significant investments on the basis of one successful film, while other films are unsuccessful (on average only 1 film in 10 makes a profit).

Cinema operators are of course interested in increasing their returns in the theatrical exhibition market, similarly to how other platform operators want to increase their own share of income. However, the success of a film in home entertainment often depends on its success in theatrical exhibition and the related marketing efforts made by distributors and exhibitors. Success in the cinema therefore has a positive knock-on effect on a film's performance in other markets. Moreover, given the small profit margins which they typically enjoy, a significant reduction of the theatrical release window would put at risk in particular small independent cinemas, depriving local economies and communities of an essential economic, social and cultural hub.

UNIC therefore strongly supports a distinct and significant release window in all UNIC territories at the beginning of the release schedule and opposes so-called Premium VOD, where the theatrical window is reduced, or day-and-date releases. The fact that an average film continues to make approximately 10–15 times more turnover in cinemas than on VOD underlines the vital importance of an exclusive period of exploitation in cinemas. This is not an argument against VOD – a number of key UNIC operator members are actively exploring VOD ventures – but rather an argument that such developments should utilize the optimum release strategy.

Release schedules vary from country to country and are shaped by cultural and linguistic preferences, market conditions and the development of national audiovisual policies over the past decades. The ability to launch national releases tactically on different dates, territory by territory, significantly increases a distributor's ability to maximize the box office return from any given title.

The increasing trend for the European Commission to comment on or even intervene in 'how films should be released' is becoming a matter of great concern to UNIC, which believes that such matters should almost always be decided by the market or – in some cases – national governments who best understand the prevailing conditions in each territory.

European law stipulates that issues around the release schedule are a matter of contractual negotiation between the different operators in the market. Additionally, in some countries, governments become involved based on specific national cultural policy rationales. Given the fragmented nature of Europe's creative content markets and the fact that cultural policy-making rests within the remit of EU member states, UNIC believes that there is no justifiable reason for Brussels to get involved in debates about release windows. EU policy-makers would be well advised to trust rights holders as well as their colleagues at national level to do what is right for each market and for the development of the industry.

3.5
Towards more Transparency among Collecting Societies

All exhibitors operating in UNIC territories currently make music-rights payments to collecting societies. These payments are typically intended to reward songwriters, composers and musicians for the use of their music in film soundtracks, and in providing background music in auditoriums, lobbies and other public areas. UNIC absolutely supports the entitlement of all creative people to a fair reward for their work.

The level of payments varies from territory to territory and is generally set by national legislation or by collecting societies themselves. It is typically calculated at around 1 per cent of box office, but in some countries it is significantly higher. Often, it is unclear how fee levels are determined and what factors are taken into consideration in this process. It is furthermore generally difficult and costly to challenge the collecting societies before national courts or relevant copyright tribunals.

For example, any measure based on a percentage of box office intake – as exists in most UNIC member countries – ignores the fact that the amount or quality of music is rarely what essentially drives cinema admissions. Another example is 3D films, where the significant increase in box office has been driven by each exhibitor's willingness to invest in digital cinema and 3D equipment. The success of 3D is not related to music, yet collecting societies continue to receive a significant 'windfall' profit from the box-office returns related to 3D films.

UNIC strongly believes that the level of payments required of exhibitors in some member countries is both unfair and potentially damaging to the livelihoods of cinema operators and those who rely on them for employment.

Additionally, UNIC believes that there is a lack of transparency in how the revenues flowing to collecting societies are managed. It is unclear how the return to individual musicians, songwriters, etc. is calculated, and how much money is retained centrally to fund the administration of a collecting society. UNIC therefore welcomes and supports the European Commission and the European Parliament's decision to investigate this further in 2012. In this context, UNIC submitted in early 2012 collated evidence from all UNIC territories on the rights payments that cinema operators make to collecting societies and related issues of concern.

4.
THE YEAR AT UNIC

Le Navire, Valence

In the past 12 months, UNIC re-confirmed itself as the key voice for international exhibition in the European Union and beyond. The association moved from Paris to new offices at the heart of the European quarter in Brussels, a stone's-throw away from the European Commission. It re-registered as an international association under Belgian law and hired a new Chief Executive supported by a small executive team. This was all made possible through the support of UNIC members, who increased their contributions to UNIC, as well as by widening the membership base, in 2010 and 2011. Most recently, UNIC was joined by Cinema City International, the largest exhibition company operating in central Europe, thus increasing its reach in this dynamic region.

4.1
Outreach and Partnership Development

Since these changes, UNIC has re-introduced itself to all relevant European policy-makers and departments relevant to exhibition and the film industry in general. It has explained its main positions, agreed at the Cannes General Assembly in 2011, and has since maintained a close working relationship with decision makers ranging from the European Commission, to the European Parliament and all film-industry related trade associations (further listed below). It also collaborated closely with the European Audiovisual Observatory and Media Salles.

4.2
UNIC Policy Positions

UNIC's work mainly concentrated on the following policy issues, which are further outlined in our position papers and which are available on our website (www.unic-cinemas.org):

- The social, cultural and economic contribution(s) of cinemas;
- The value of exclusive and sustainable theatrical release windows for the film industry;
- Digital roll-out and 3D;
- Film theft;
- Transparency of collecting societies; and
- Disability and access.

In this context, several consultation submissions and letters that outline key UNIC positions were prepared:

- UNIC position on the EC Green paper on the digital distribution of audiovisual works in the EU;
- UNIC position on the review of the EC Cinema communication;
- Open Letter to US studios regarding digital roll-out;
- Open Letter to Commissioner Vassiliou regarding the EC's VOD strategy; and
- Briefing document on cinemas' rights payments to collecting societies.

4.3
Other Activities of Relevance

ADVOCACY

- Submitted positions in relation to the EP reports on European cinema in the digital era (MEP Borys) and Digital distribution of audiovisual work in Europe (MEP Cavada);
- Participation in EC expert group on digital cinema; and
- Participation in EC expert group on digital distribution.

OUTREACH AND COMMUNICATIONS

- Liaison and closer cooperation with the international art-house cinema federation CICAE and the EC-funded cinema network Europa Cinemas;
- Close relationships with FERA (directors), FIAPF (producers), FIAD (distributors), IVF (video & VOD) and the MPA (studios);
- Strong relationship with NATO, UNIC's sister organisation in North America;
- Outreach to digital cinema heads of all major studios to discuss UNIC's concerns in relation to the digital roll out in Europe;
- Represented UNIC at cinema conventions in Lyon, Baden-Baden, Las Vegas and presented its work at board meetings of member associations in the UK, the Netherlands, Germany and Sweden;
- Relaunched UNIC-website and launched Facebook and Twitter accounts; and
- UNIC in the media: articles in Screen International, Screen Trade, Côté Ciné, Filmecho, others.

4.4
CineEurope 2012

CineEurope is UNIC's Official Annual Convention, and is organised in collaboration with the owners of the show, Prometheus Global Media. From 18–21 June 2012 CineEurope will be held in Barcelona, marking a strategic relocation of the convention which was to a significant degree initiated by UNIC. There are many indications that the 2012 edition of CineEurope will be a great success and that the new location and programme will attract more participants than ever before. The tradefloor was sold out by April 2012 and will host twice as many companies as in 2011.

UNIC has in recent years increased its engagement with CineEurope in the strong belief that a dynamic European exhibition landscape has to stage a truly international cinema convention which reflects the importance of the territory in order to raise its profile with international partners. Since 2011, UNIC has been instrumental in planning the conference strand of CineEurope, thereby ensuring that visitors get offered a programme that caters effectively to the needs of a European audience.

UNIC looks towards further increasing its engagement with and for CineEurope in the future and is excited about realising further the untapped potential of the show, all to the benefit of European exhibition.

5. LOOKING AHEAD

National Schools Film Week 2011

As this report shows, UNIC has evolved rapidly in the past 12 months. A key issue for the association in the coming year will therefore be to continue on this positive development path. At the same time, we wish to ensure a degree of stability and continuity – both in relation to the issues that we deal with as well as in an organisational and financial context.

Looking at the EU policy agenda, debates about release windows and rights licensing will continue to emerge from time to time. UNIC will stand ready to defend the views expressed in this report. In addition to this, the association will become even more involved in the policy discourse concerning piracy and specifically film theft. Of course, we will also continue to carefully monitor developments in relation to the digital roll-out and ensure that our views are heard when it comes to regulating collecting societies.

In order to extend our reach, the association will actively seek to recruit new members. A key region where we wish to expand is Central and Eastern Europe.

Last but not least, UNIC will celebrate its 60th birthday in November 2012 and the 12 months thereafter. Cinema exhibitors will be able to celebrate the fact that they continue to touch the lives of billions of people across the continent. They will also look back at decades of extraordinary entertainment and growth. A key issue for UNIC will be to ensure that exhibition's future is as positive as its past.

6.
PARTNERS

Partners from EU institutions, civil society and industry include, but are not limited to:

6.1
Representing the sector

CICAE – International Confederation of Art Cinemas
Europa Cinemas
EDCF – European Digital Cinema Forum
NATO – National Association of Theatre Owners
FERA – European Federation of Film Directors
UNI-MEI – International Arts and Entertainment Alliance
SAA – Society of Audiovisual Authors
FIAD – International Federation of Film Distributors' Associations
Europa Distribution – European Independent Distributors
FIAPF – International Federation of Film Producers' Associations
CEPI – European Independent TV and Film Producers
IVF – International Video and Video on Demand Federation
MPA – Motion Picture Association

6.2
Institutional partners

European Parliament
European Commission

6.3
Others

European Audiovisual Observatory
Media Salles

7.
MEMBERS

In 2011, UNIC welcomed up two new members: Cineworld Cinemas Ltd, and Cinema City International, the latter of which significantly widens its Central European footprint.

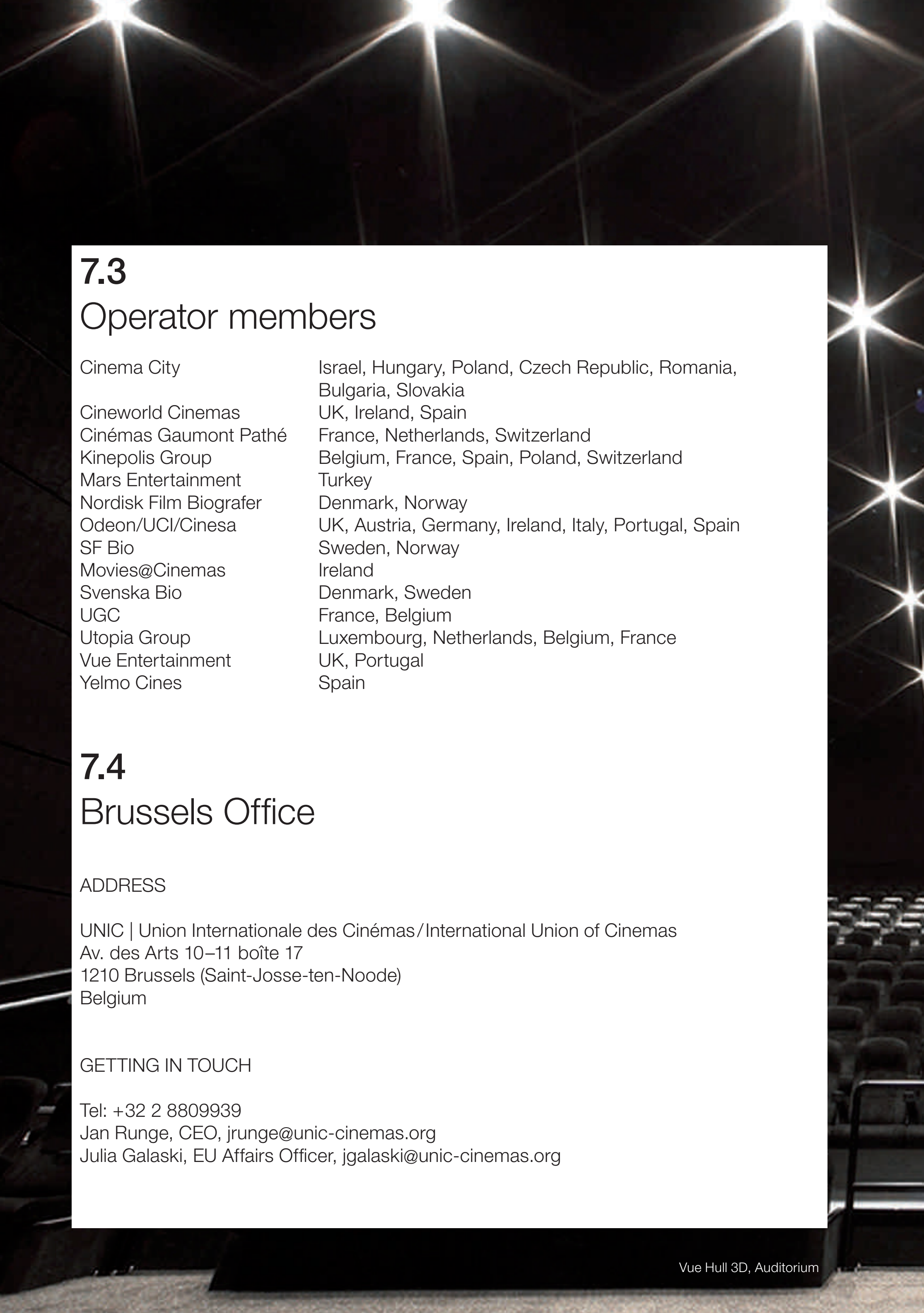
7.1
Board of Directors (from May 2011)

President	Ad Weststrate (Netherlands)
Senior Vice President	Phil Clapp (UK)
Vice Presidents	Jean Labé (France)
	Lene Løken (Norway)
	Kim Pedersen (Denmark)
	Mario Mazzetti (Italy)
Treasurer	Andreas Kramer (Germany)

7.2
Members of UNIC

Association members and affiliated members (*)

Austria	Fachverband der Kino-, Kultur- und Vergnügungsbetriebe
Belgium	Fédération des Cinémas de Belgique (FCB)
Denmark	Danske Biografer
Finland	Finnish Cinema Exhibitors' Association
France	Fédération Nationale des Cinémas Français (FNCF)
Germany	Hauptverband Deutscher Filmtheater Kino e.V.
Greece	Federation of Greek Cinematographers*
Hungary	Mozisok Orszagos Szovetsege*
Israel	Cinema Industry Association in Israel
Italy	Associazione Nazionale Esercenti Cinema
Italy	Associazione Nazionale Esercenti Multiplex
Netherlands	Nederlandse Vereniging van Bioscoopexploitanten (NVB)
Norway	Film & Kino
Russia	Kino Alliance
Spain	Federación de Cines de España
Sweden	Sveriges Biografägareförbund
Switzerland	Association Cinématographique Suisse
Turkey	Turkish Cinema Operators' Association (SSID)*
UK	Cinema Exhibitors' Association (CEA)



7.3
Operator members

Cinema City	Israel, Hungary, Poland, Czech Republic, Romania, Bulgaria, Slovakia
Cineworld Cinemas	UK, Ireland, Spain
Cinémas Gaumont Pathé	France, Netherlands, Switzerland
Kinepolis Group	Belgium, France, Spain, Poland, Switzerland
Mars Entertainment	Turkey
Nordisk Film Biografer	Denmark, Norway
Odeon/UCI/Cinesa	UK, Austria, Germany, Ireland, Italy, Portugal, Spain
SF Bio	Sweden, Norway
Movies@Cinemas	Ireland
Svenska Bio	Denmark, Sweden
UGC	France, Belgium
Utopia Group	Luxembourg, Netherlands, Belgium, France
Vue Entertainment	UK, Portugal
Yelmo Cines	Spain

7.4
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