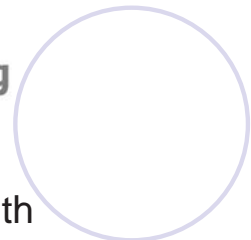
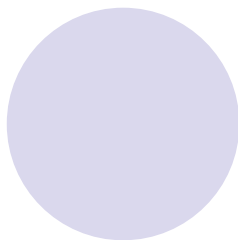
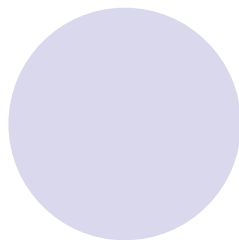


# Study on dubbing and subtitling needs and practices in the European audiovisual industry



in partnership with



**peacefulfish**  
consultancy for financing the content industry

Media Committee - 28 July 2008

# Purpose of the study

- **Assess** the current dubbing and subtitling needs and practices
  - in the 31 countries participating in the MEDIA 2007 Programme.
  - According to the MEDIA 2007 Programme objectives
- **Provide recommendations** regarding measures to implement at European Community level in order to:
  - Encourage linguistic diversity
  - Reduce obstacle to the circulation of AV works in the international market

## 3 key questions

- Who are the **market players** and **how is this market is structured?**
- What are the **problems and obstacles** influencing the circulation of European works, as part of European linguistic diversity?
- How can the **circulation of works be promoted**, an essential tenet in the European cultural diversity and in the competitiveness of the audiovisual industries?

## Part 1: The structure of the dubbing and subtitling market

- **631 dubbing and subtitling companies** in EU 31 of which 160 are leader in Europe.
- **Sector turnover:**
  - The 2006 turnover is estimated between **372 M euros and 465 M euros**.
  - Italy, France, the UK and Germany gather 84.64 % of this turnover
  - 30 % of this turnover is estimated to be realised on European audiovisual works

# Tarification

## Dubbing for TV broadcasting tarification

(voice and final mix included)

Less than 80€min: Eastern Europe

Between 80 and 200€min: Western Europe

More than 200€min: big markets (IT, FR, DE, UK, ES)

## Subtitling tarification

(adaptation included)

Less than 5 €min: Most of the Eastern European Countries

Between 5 and 10 €min: Southern Europe (ES, IT, PT) and NO, IS, FI + PL, SI

Between 10 and 15 €min: NL, DK, SE

Between 15 and 20 €min: FR, DE and « dependent » countries

## Average cost of a film : a 90' film with 900 subtitles, copy cost included

- Big market Countries (DE, ES, FR, IT):
  - 5.300€ for subtitling;
  - 34.900€ for dubbing
- North European Countries (NO, NL, FI, SE, DK):
  - 2.600€ for subtitling;
  - 52.000€ for dubbing
- Central and Eastern European Countries:
  - 1.900 € for subtitling;
  - 17.300 € for dubbing
- **Island** and **Portugal** do not fit in any category with costs respectively of 3.000 € and 1.400 € for subtitling and from 7.000 € to 35.000 € for dubbing.

# The Market demand

According to our estimations:

- Theatrical first releases:  
**2 172 ENN films** or **3 793 hours** of content (750 h for dubbing countries, 3 043 h for subtitling countries).
- European TV channels broadcast  
**408 320 h** of dubbed or subtitled content (**122 500 h** of which are European works).

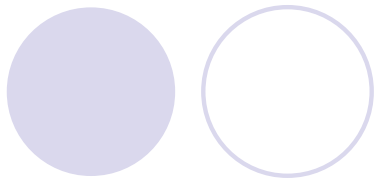
# Legal considerations

- **Not many regulatory provisions** exist for the dubbing/subtitling sector
  - with the exception of some countries like FR, the UK, ES, DE and FI
- the sector being essentially governed by **voluntary agreements between companies and professionals**
- Only specific **obligations for children's programmes** do exist
  - these have to be dubbed in all countries both in cinema and television
- the main motivations underpinning national legislations are as follows:
  - Defending and Promoting the national language
  - Addressing the Specific situation of linguistic minorities.
  - Addressing the Specific situation of people with impairments.



# International & EU legislation

- 2 professions take centre stage:
  - the dubbing actor
  - the audiovisual translator/adaptor
- At international level:
  - The Berne International Convention
  - The Rome Convention
- At European level:
  - Directive 92/100/EEC (19 November 1992) amended by Directive 2006/115/EC harmonizes provisions regarding rental rights and lending rights, and certain rights related to copyright in the field of intellectual property
  - Directive 93/98/EEC (29 October 1993) harmonizing the term of protection of copyright and certain related rights, amended and replaced by the directive 2006/226/EC
  - Directive 2001/29/EC (22 May 2001) on the harmonisation of certain aspects of copyright and related rights in the information society
- But legal regimes widely vary from one Member State to another



## Dubbing actors

- Significant differences in their legal status and regimes noted:
  - Application or non-application of IP rules and
  - the existence or non-existence of related rights in the form of a right to additional remuneration generated by the exploitation of their works.



## Audiovisual translators / Adapters

- The Berne International Convention stipulates that **translators are to be considered authors** meaning that their revenue is linked to author's royalties
- All the countries in the study did sign the Convention.
- Yet, this concept is contested in many countries in the sense that only the technical aspect of the activity is taken into account, without acknowledging the creative value of the translation service.

## Widely varying legislations

- In countries where the legislation is relatively ambiguous without any specific provisions, it leads to the creation of “*grey areas*” characterized by **fixed and final tariffs as well as the buying out of rights**.
- In such cases, it is generally assumed that the rights of the dubbing actors and audiovisual translators are transferred without any other options available to them.
- Important to note that **the presence of a collective management society** in the country for audiovisual translators and dubbing actors **guarantees the collection of a certain percentage from the utilization of the translation and/or the dubbed work**



# Accessibility Issues

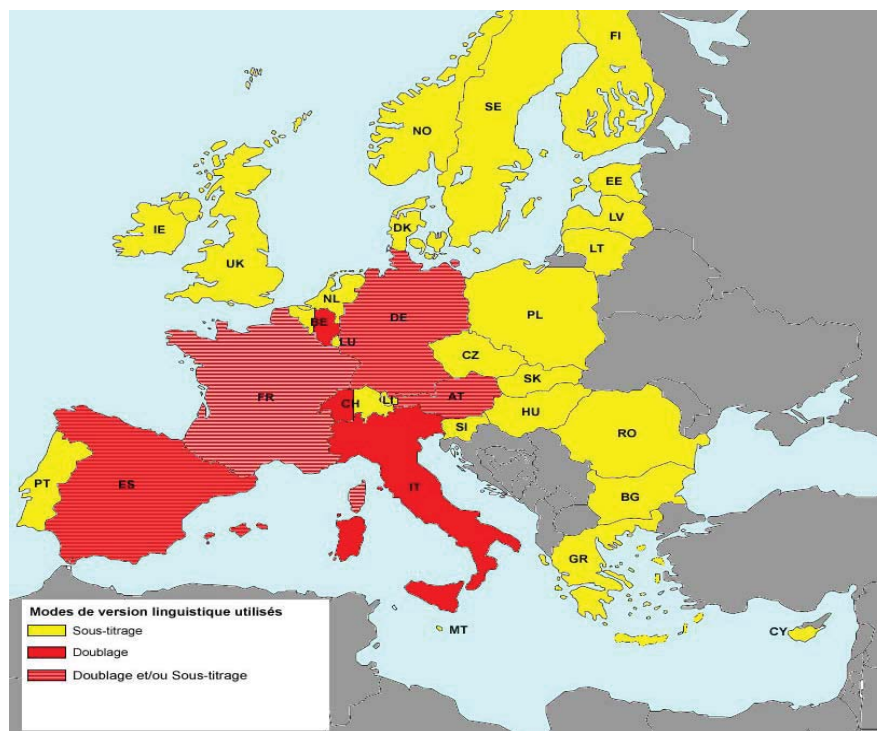
- The differences between MS should be reduced by the transposition of the “AMS” Directive and its article 3 b)
  - *“Member States shall encourage media service providers under their jurisdiction to ensure that their services are gradually made accessible to people with a visual or hearing disability”.*
  - not binding but enlarges the scope of the recommendation for some MS to visually-impaired or blind persons.
- In MS where **associations play an active role** in increasing accessibility to hearing/visually-impaired persons, the regulatory framework is more developed, and there are more measures to encourage accessibility to television programs and cinemas.



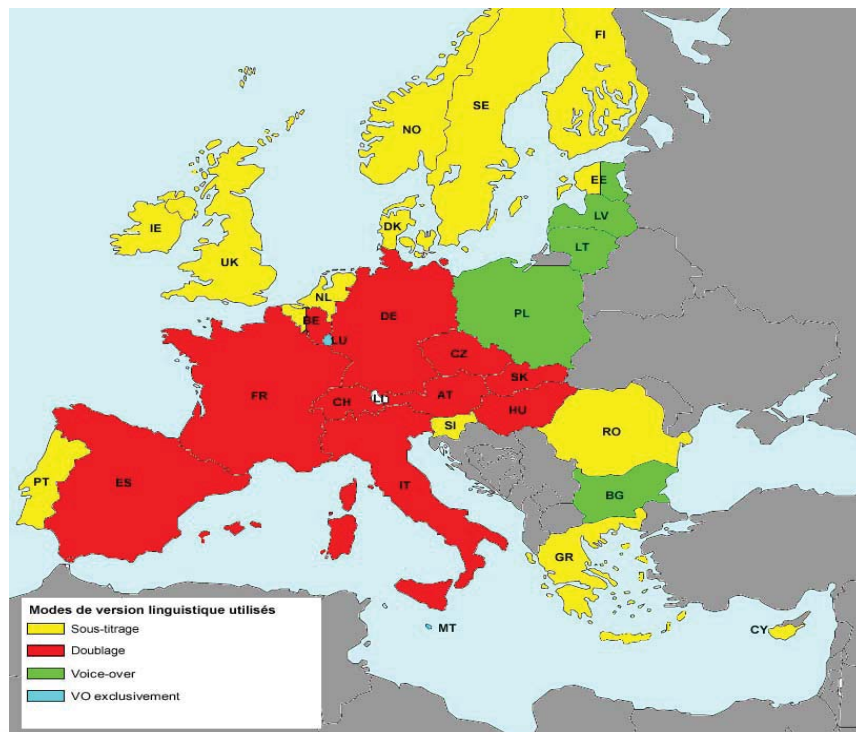
# Accessibility Issues

- *For broadcasters*, current obligations can be grouped into the following categories:
  - Laws for minorities and disabled persons.
  - Laws for broadcasting on television and radio.
  - Public service contract.
  - TV channels internal regulations.
- *For cinema*, the few existing provisions are very general:
  - Void of any practical or technical dimension.
  - They vary considerably from country to country, no harmonization of accessibility techniques.
  - Most of the measures result from initiatives taken by associations and/or exhibitors in order to make up for legislative shortcomings.

# Map of language-transfer practices for cinema works screened in Europe



# Map of language-transfer practices for television works broadcast in Europe





## Part II. Problems and obstacles influencing the circulation of EU works

- The quality of audiovisual translation
  - Problems are often the result of deadlines, budget and volume or of non-professionals and no quality control through re-reading.
- An unsolvable equation: volume/deadlines/price
  - The *volume in hours* to be translated is increasingly high and continue to grow as with the number of channels broadcasting
  - Unregulated workers competition and delocalisation contribute to the downward *pressure on budgets*
  - Shortening of deadlines proposed by clients.
- Training: a real question?
  - Number of training courses available are sufficient for some companies and not for others.

- Problems relating to the circulation of children's programmes and animation
  - Expensive practice for countries using subtitles for all other kinds of films
- Linguistic transfer is necessary for the circulation of non-national AV works but is not enough
  - Depends on the vested interests of the main players in the system.
  - Territoriality of rights often slow the intra-European circulation of works.
- Linguistic areas are to be considered
  - Foreign countries belonging to the same linguistic area are privileged territories in commercial relations contributing to the fact that most non-national works do not circulate on TV.

# The impact of the MEDIA Plus policy on dubbing and subtitling

- The results of the MEDIA Plus support confirms the tendencies observed in the principal dubbing markets, which are gradually opening up to distribution of original subtitled versions of films
- 4 dubbing territories (DE, IT, ES, FR) concentrate most of MEDIA Plus support in financial terms while, in terms of projects, the sharing is more balanced and many territories benefit from the release campaigns of supported films
- During the period 2001-2004, the 5 big countries represented 39% of projects aided (362 projects out of a total of 928 supported) while in the year 2004 the support to the big countries projects represented only 29% of the total (79 projects out of 241).
- The impact of MEDIA Plus is significant in terms of supported national release campaigns, particularly in the smaller countries and the new Member States.

# Problems relating to accessibility

- *In the Cinema*
  - Isolated initiatives supported by concerned organisations and the state.
  - lack of funding to equip the cinemas and the limited supply of films using special subtitles and audio-description.
- *In TV broadcasting*
  - Accessibility policies vary enormously between channels.
  - Impossible to have accurate statistics on the volume of hours made accessible for handicapped audiences.
  - Accessibility policy, where it exists, is aimed especially at hearing-impaired audiences.
  - The only channel that regularly provides programming with audio-description is the BBC (8%)
  - European countries do not have the same technical norms when producing versions for the hearing- and visually-impaired.

# Problems relating to multilingualism

- Illiteracy and audiovisual consumption
  - No correlation whatever the indicators used.
- Multilingualism, cinema and television
  - TV does not play an important role in learning languages, apart through intra-linguistic subtitles.
  - The profile of the average multilingual is not the same as the profile of the average TV viewer, who is older, more female and more socially isolated.
  - Living in a country that favours TV dubbing does not correspond with a lower level of linguistic proficiency

# Recent digital contributions to dubbing and subtitling

- According to the *technical companies* surveyed in the bigger countries (DE, ES, FR)
  - Technical aspects and work methods will change the most
  - Creative aspects (adaptation, translation and dubbing actors) will remain the same except maybe for translation software.
  - Digitisation will bring productivity gains at administration levels
- Digital cinema will give *distributors* and *exhibitors* interesting new opportunities, both in terms of choice for audiences and in terms of cost reduction.
  - Digitisation above all means equipping cinemas which implies investment that is prohibitively expensive for smaller exhibitors.
- The situation for *TV channels* varies a lot depending on the country.
  - Some broadcasters believe it will have an impact sooner on subtitling than on dubbing where the “human” factor of the actors will remain.
  - Technical procedures will be affected by digital developments.
- *Advantages in accessibility* to programmes for visually- and hearing-impaired viewers
- In terms of *supply and choice*, possibilities of “double versions” and “multilingual versions”.

## Part III. Conclusions and recommendations

- **Conclusions regarding the quality of the audiovisual translation**
  - Threatened by pressure on the structural variables of the market: price, volume, deadlines.
- **Conclusions regarding the circulation of works**
  - **Language transfer is a necessary but insufficient condition**
  - Technical issues when going from one medium to another in some EU countries (i.e.: film subtitled for cinema release that requires a dubbed version for TV broadcast)
  - Within linguistic areas, the choice of distributors and broadcasters is determined by the language choices made by the leader countries. In several countries, European films are underrepresented in children's films library.

- **Conclusions regarding the accessibility of European audiovisual works**

- Volume of programs available to hearing/visually-impaired persons is very low.
- Level of accessibility does not meet the recommendations of the “AMS” Directive to be adopted at the end of 2007.
- Current business model incompatible with the requirements which are related to the implementation of this Directive.
- Absence of harmonization between technical standards is an obstacle to the productivity and circulation of these versions within linguistic areas.

- **Conclusions regarding technological research and multilingualism**

- Absence of dialogue between research on digital technologies, notably as part of the FP7, and on multilingualism, which penalizes the perspectives of future technological innovation, whereas the two fields converge as regards audiovisual broadcasting.





# Recommendations

- **Quality of audiovisual translations**

1. Encourage the setting-up of a European reference (normalization of professional practices, standardization, quality labelling).
2. Provide more information on professions related to translating, and on available resources. In particular, encourage dialogue between all concerned parties from the various European countries in order to define “European” standards pertaining to training for audiovisual translation.
3. Provide more information on innovative technologies such as automatic audiovisual translation which will make it possible to federate the three determining variables (volume of hours, tariffs, deadlines) by enabling translators/adapters to once again play a central role in the quality of the finished text.
4. Provide more information on the language versions already available by supporting, for example, the development of databases inventorying the availability of rights to subtitled versions for programs.



# Recommendations

- **Circulation of works**

1. Support the **creation of “packages” of linguistic versions** (dubbed + subtitled versions in national language or main languages of the country) produced from the post-production phase in order to optimize the potentialities of digital broadcasting. This support could be granted to sales agents and/or film distributors as well as to vendors of audiovisual programs for fictions and youth programs.
2. Systematically **create an international version** (Music & Effects band) in order to facilitate sales to broadcasters in countries where the dubbed version is expected, thereby enlarging the perspectives of international circulation of European works, especially those of smaller countries.
3. Consider a **modification of the MEDIA guidelines**, by authorizing independent distributors already receiving support for subtitling of a given work to re-invest the MEDIA aid in the dubbing of the same work for subsequent television broadcasting



## Recommendations

4. **Expand the scope of the MEDIA Distribution/Sales agents support** to include language versions tailored to specific regions in order to encourage the selling of European programs, in particular to broadcasters since they guarantee, de facto, purchases made by distributors.
5. Set up inside MEDIA, **an automatic mechanism encouraging** cable and satellite TV channels of the main countries, and encouraging the large TV channels of smaller countries, **to invest in the creation of dubbed or subtitled versions of non-national European works**. This could also include the promotion and broadcasting of these programs at times of high viewership.
6. Set up a **special support mechanism for the distribution of European animation and youth programs**, or else create a special module in the automatic distribution, notably a special grant for the dubbing of such works.



# Recommendations

- **Accessibility of European audiovisual works**
  1. Encourage the **harmonization of technical standards** (signs, colours, positions) in the creation of subtitled works for deaf and hearing-impaired persons, as well as in audio-description. A common utilization code could be created, thereby meeting the requirements of distributors and viewers alike. This harmonization should also take place at legal and regulatory levels (including the Application of intellectual property rules which would vary depending on the types of access service) and via constructive dialogue with other groups of sector players.
  2. **Expand European research programs** to include questions of accessibility of audiovisual works in order to encourage the development of suitable software applications.



# Recommendations

- **Technological research and multilingualism**
  1. **Encourage synergies and convergence** between European research programs and developments in the digital sector.
  2. Carry out **research into potential co-relations between subtitling and the development of multilingualism.**