STUDY ON DUBBING AND SUBTITLING NEEDS AND PRACTICES IN THE EUROPEAN AUDIOVISUAL INDUSTRY

Final Report

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Notice

This document is the final report of a study on dubbing and subtitling needs and practices in the European audiovisual industry. It contains the definitive results of the study. It also includes a technical report with quantitative and qualitative data analyzed as part of the study, a glossary of dubbing and subtitling terms, as well as summary profiles for each country included in the study.

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Executive Summary

Introduction

The purpose of the “Study on Dubbing and Subtitling needs and Practices in the European Audiovisual Industry”, initiated by the Information Society and Media Directorate-General and the Education and Culture Directorate-General, is to explore dubbing and subtitling practices in the 31 countries participating in the MEDIA 2007 program. The study is also intended to provide recommendations regarding measures to implement at European Community level in order to encourage linguistic diversity, whilst reducing obstacles to the circulation of audiovisual works on the international market.

This assessment of current dubbing and subtitling practices was carried out to reflect the goals of the Information Society and Media Directorate-General, and, more specifically, those of the MEDIA program:
- increase the circulation of European works;
- boost the competitiveness of the European audiovisual sector;
- promote cultural and linguistic diversity.

The study consists of three major parts:

The first part looks at the structure of the dubbing and subtitling market; the legal situation, as well as the structure of market supply and demand are analyzed.

The second part looks at issues regarding the circulation of audiovisual works and the competitiveness of the European audiovisual industry. In particular, this part looks at the policy of the MEDIA Plus program, and its impact on the circulation of audiovisual works. This part also addresses issues related to accessibility of works, multilinguism, and the recent impacts of digital technology on dubbing and subtitling.

The third and final part features a number of conclusions emerging from the analysis of the preceding parts, and gives recommendations which could be implemented at European community level.

Study Methodology

The study involved collecting data in order to assess the operation of a number of dubbing and subtitling activities.
As regards the gleaning of legal data, the study research was based on documentation collected and discussions, essentially with representatives of professional associations, trade unions, regulatory authorities, collective management societies and the European Film Agency Directors (EFAD). Information was collected for each country regarding the legal framework applying to dubbing and subtitling. The study also looked at regulations devised to facilitate access to audiovisual programs for special-needs audience (hearing and visually-impaired persons). All these legal aspects are of a nature to impact on the structure of the markets covered by the study.
The analysis itself of the markets’ structure was based on the scrupulous examination of replies to a number of questionnaires sent to technical industry players, broadcasters, distributors, video publishers and festivals. This information was then supplemented by qualitative discussions and case studies carried out with sector professionals. The various markets identified during the study can be characterized by:

- supply rendered by dubbing and/or subtitling technical specialists;
- demand coming from sales agents, distributors, broadcasters, video publishers, festivals.

Lastly, a workshop bringing together a number of European experts was set up in order to validate and further enrich the results obtained.

Results

Dubbing/subtitling/voiceover practices in Europe

Generally divided into two large sections (dubbing countries versus subtitling countries), the actual situation in Europe is far more complex.

As regards works distributed in cinemas: most European countries use subtitling. And even though some countries would traditionally be inclined to prefer dubbing (Italy, Spain, France, Germany, Austria, Hungary, Czech Republic), it was noted that most of them are clearly moving towards subtitling. In fact, only Italy and Spain, where films are generally dubbed, have resisted this trend.

As regards works broadcast on television: dubbing is the preferred option in 10 countries: Germany, Austria, Spain, France, Hungary, Italy, Czech Republic, Slovakia, Switzerland, and French-speaking Belgium. Voiceover is used in 4 countries: Bulgaria, Poland, Latvia and Lithuania. Voiceover is also present to a lesser extent in Estonia, where 33% of foreign language programs use voiceover, with the remainder subtitled.

The remaining European countries use subtitling, with Luxembourg and Malta a special case in that they broadcast foreign audiovisual works exclusively in the original version.

The European situation can also be explored using the criterion of “linguistic area”. If there are a number of countries speaking the same language, the practices of distributors and broadcasters in the smaller countries will depend on the purchasing policies of the leader country in that linguistic area.

For example:
- French-speaking countries: France (leader country), French-speaking Belgium, Luxembourg, French-speaking Switzerland.
- German-speaking countries: Germany (leader country), Austria, Liechtenstein and German-speaking part of Switzerland.
- English-speaking countries: United Kingdom (leader country), Ireland, Malta.
- Italian-speaking countries: Italy (leader country), Italian-speaking Switzerland.
- Greece (leader country) and Cyprus are also linked to each other.
In addition to these differences related to broadcasting media and linguistic areas, practices also vary depending on the genre of the work. For example, in almost all 31 countries in the study, children's films are dubbed, both in cinema and television. This practice is particularly expensive for Scandinavian countries, where all other audiovisual works, distributed or broadcasted, are subtitled. Norway, Sweden, Denmark, Finland and Holland are amongst the most expensive countries, with the dubbing of a film costing on average 52,000€, i.e., 66% more expensive than the European average.

Documentaries are a special case: very often, non-national documentary films are screened with voiceover, or a mixture of voiceover and subtitling. In general, TV fictions are treated in the same way as cinema films.

Wide variety of regulations in Europe

There are relatively few regulatory provisions regarding the dubbing and subtitling sector as a whole (with the exception of some countries like France, United Kingdom, Spain, Germany and Finland). And it was concluded that only French legislation acts as a genuine tool to support the dubbing and subtitling industry.

The Berne International Convention of 28 September 1979 for the protection of literary and artistic works, stipulates that translators should be recognized as authors. This means that their revenue will be linked to author’s royalties, depending on how the translated work is used.

Regarding dubbing actors, significant differences in their legal status and regimes were noted. A dubbing actor can be an “author” or a “performing artist” in France, Spain and Belgium, a “freelance arts worker” in France (governed by the “intermittent du spectacle” regime), an “actor” in Iceland, an “independent worker” in other countries, a “translator” in Scandinavian countries, a “reader” in Poland, and so on. The differences are based essentially in the application (or non-application) of intellectual property rules and on the existence (or non-existence) of related rights in the form of a right to additional remuneration generated by the exploitation of their work.

In general, significant differences between remuneration criteria used between member states were noted, as well as regards how the same service is considered from one member state to another.

The study concluded that, in those countries with a clearly defined legal framework (Germany and France for dubbing actors, for example), there are no reasons for producers and distributors to try to lower prices. By contrast, whenever the legislation is ambiguous (i.e., not governed by specific provisions), then the regulations regarding intellectual property generally apply to dubbing actors and/or translators in the audiovisual sectors. This gives rise to “grey” areas, where practices such as the “buying out” of rights and/or the imposition of fixed and final tariffs tend to predominate. In such cases, it is generally assumed, when signed the work contract, that the rights of the dubbing actors and audiovisual translators are transferred, without any other options available to them.
The practices of sector professionals at various links in the value chain

- A supply catered to by technical industries or service providers

The European dubbing and subtitling technical landscape reflects more or less the economic importance of each country within the 31 European countries studied.

In the larger countries, the supply of dubbing services is quite competitive. By contrast, the laser subtitling market is quite concentrated, with over 80% of sales returned by the 3 leading companies, and over 50% of sales returned by the 5 leading companies.

Most of the dubbing/subtitling companies in Western Europe are specialized in one of these activities, whereas in Eastern Europe, dubbing and/or subtitling is generally just one activity amongst others (generally part of a range of audiovisual post-production services).

There can be no doubt that the internationalization of the technical industries activity is the key factor conditioning the future development of sector businesses. This is mainly due to the development of international customers selling their programs in several countries. Based on discussions with surveyed companies, economies of scale, notably as regards subtitling, will only be possible if the volume of work handled is increased. This means staying with customers in the countries where they set up. This practice can also lead to the parallel development of a base of local customers.

The study estimated that 2006 turnover for the European dubbing and subtitling industries was between 372 million € (minimum estimate) and 465 million € (maximum estimate).

- A demand generated by market players

Sales agents

In most countries, sales agents have the “international version” of films (i.e., “Music & Effects” track separated from the “Voice” track of the original version). This is used to make it easier to sell to countries which prefer dubbing, or to TV channels which, in several countries, prefer to broadcast dubbed into the local language. Moreover, the films proposed are generally in the original version with English subtitles. This version is then adapted to the local language by the program buyer.

Sales agents can use a number of strategies to facilitate selling: subtitle the work into a second language (mandatory for festivals, and strategy to encourage sales on the second market); dubbing into English (for some animation films or genre films, or for territories where English is perfectly understood (e.g. Scandinavian countries and Southeast Asia); subtitling into Spanish (for the Latin American markets).

Once the film has been sold, it would seem that sales agents no longer really consider themselves concerned by language-transfer issues; they consider that the local distributor is the best informed party to arbitrate between subtitling and dubbing, depending on local practices. In order to facilitate translation of the original version, sales agents provide distributors with the dialog list, in the original version and in English, and the spotting list, which is used to position subtitles. Whenever the dialog is translated from English (and not from the original version), the quality of the final product is affected.
**Distributors**

Owners of the distribution rights to films in their countries, it is up to the distributors to choose between subtitling and dubbing for the films distribution to broadcasters and exhibitors.

In some countries, general market practices are such that the matter is already settled. In other countries however, the distributors will make a real choice. Generally speaking, this decision will be based on the following criteria:

- *The commercial potential of the film*: the higher the commercial potential of a film, the higher the likelihood of it being dubbed;
- *The film genre*;
- *The film budget*: in some countries where dubbing is practiced (Germany, Austria or France) small budget films and art house films will tend to be subtitled rather than dubbed. This is essentially for economic reasons;
- *Change in viewer preferences*;
- *The possibility to sell the film to a television station*: television broadcasters (especially in France and Germany) ask for dubbed versions. This means that a film brought out in the cinemas with subtitles might later be dubbed for sale to broadcasters.

Generally speaking, the cost of dubbing or subtitling a film (depending on the most common practice in the country in question) does not constitute an obstacle to purchasing the film. The only exception concerns dubbing children's films in subtitling countries. The costs vary significantly between countries. In total, 3 major country groups were identified:

- Countries with a large dubbing and subtitling market: France, Germany, Spain and Italy. This group can be characterized by the high costs of subtitling, almost double the European average.
- Nordic countries: Norway, Finland, Sweden, Denmark and Holland. This group can be characterized by its very high dubbing costs (66% more expensive than the European average).
- Central & Eastern European Countries (CEEC). Dubbing and subtitling costs in these countries are significantly below the European average (45% and 30% cheaper respectively, with the exception of Slovenia).

Iceland and Portugal are more difficult to classify: In Iceland, subtitling costs are similar to other Nordic countries (on average 3000€) but dubbing costs are amongst the lowest in Europe (7000€). Consequently, the tariffs generally observed in Iceland are more in line with those of CEEC countries, rather than Nordic countries.

In Portugal, dubbing and subtitling costs are strikingly similar to those in Slovenia (1400 and 35000€ respectively on average for a 90-minute film).

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1 For the purpose of the study, the costs have been considered in the light of the overall resources specific to each country. This approach made it possible to formalize differences noted between the various groups.
**Exhibitors**

It was noted that the language-transfer decision for films released in cinemas is essentially governed by the practices in the country in question.

From an exhibitor’s point of view, linguistic diversity is only an obstacle to the circulation of works in small countries. For example, exhibitors in countries such as Bulgaria and the Baltic states experience difficulties in screening non-American films. In this case, festivals and retrospectives provide opportunities to diversify the program.

**Television broadcasters**

For television broadcasters, the decision to dub or to subtitle is determined by 2 criteria, closely intertwined: general public preferences (usually already well-established and difficult to change because of competition), and the editorial choices of the television broadcaster.

If however the broadcaster does have a choice, then this will be based on the specific nature of the work and on general public preferences (bearing in mind that broadcasting a subtitled work in countries with a dubbing tradition can lead to audience drops of about 30%). Children's programs are generally dubbed (the threshold age can vary between 8 and 12 years) regardless of the broadcaster's general practices. This phenomenon also characterizes documentaries, for which voiceover can also be used.

As regards the program grid, it was noted that whenever the broadcaster has a choice, access primetime and primetime slots will tend to be dubbed (or voiceover will be used) in order to account for viewers’ floating attention span.

Some channels provide a multilingual version for some of their programs. In this case, viewers can choose between the dubbed version and a subtitled version. Note however that this practice characterizes satellites and cable channels, and is obviously only available if subtitled program versions have actually been prepared. It was also noted that the multilingual solution is also common in countries with very clearly established linguistic minorities.

The actual language-transfer work is generally subcontracted out to external companies. However, the broadcasters will check the work done to make sure that it is of a sufficiently high quality and compatible with their technical specifications. Not many broadcasters have an internal language-transfer service.
**DVD/Video publishers**

There are very significant differences between the majors and independent publishers in this respect:

- As regards the **majors**: the DVDs are published in several languages (on average 6 dubbed versions, and 10 subtitled versions);
- As regards independent publishers: on average 1 to 3 languages per DVD.

The number of language versions created on a DVD is restricted mainly by the territorial extent of rights, and media chronology. This characteristic also concerns Video-on-Demand platforms. This phenomenon is accentuated in the case of Central and Eastern European countries, due to the presence of significant transborder minorities. For example, a Hungarian publisher cannot provide products for Hungarian-speaking minorities in bordering countries such as Romania or the Ukraine.

In general, video publishers purchase dubbed and subtitled versions already available (from distributors and broadcasters). If the distributors have the rights to the video release of a film, then they generally use the subtitled/dubbed versions already prepared for the cinema release. Sometimes, for the purposes of a DVD release, sales agents try to retrieve the language versions prepared by their customers after the rights have expired (generally after 15 years). It should be said however, that the residual commercial potential is by then rather limited, especially if a film was shown extensively.

**Festivals**

In Europe, the issue of language versions is addressed differently from festival to festival. However, the following 2 comments hold for all festivals studied:

- Almost all non-English language original versions are screened with English subtitles, generally laser subtitles. In fact, this is an entry requirement for some festivals.
- Most festivals also include the translation of films into the official language of the country, at least for competing films.

The number of subsequent language versions made available by a festival depends essentially on national and local specific features. Generally speaking, films are translated into the official language of the festival country using electronic subtitling techniques. The cost of applying electronic subtitles to a 90-minute film varies greatly between countries, and can range from 120€ (Czech Republic) to 1800€ (France).
An estimation of the demand

As part of the study, a quantitative estimation of the language-transfer demand originating in cinema distributors was done. Note that this estimation concerned just initial-release films.

The total number of non-national European films in circulation in the 31 studied countries was 2,172, corresponding to about 3,793 hours (assuming that the average film lasts 90 minutes). This can be broken down into 750 hours for dubbing countries (the four majors: Germany, Spain, France, Italy) and 3,043 hours for subtitling countries.

It was estimated that the total volume of fiction works broadcast on television channels in Europe was 573,248 hours: 32.9% for dubbing countries, and 67.1% for subtitling countries.

Non-European fictions accounted for 73% of the total, of which 73.15% consisted in American programs (54% of the overall total). Non-European fictions represented 68.57% of hours in dubbing countries, compared with 79.55% in subtitling countries, which in fact corresponds to a clear predominance of English-speaking programs since most (i.e., 57%) of these works are coming from English-speaking countries (USA, Australia, New Zealand and Canada).

This estimation was based on a sample of 156 channels over 29 countries (data taken from the European Audiovisual Observatory for 2005). Extrapolating these results to the 596 channels of the 31 countries in the study would yield the following: 408,320 hours per year for dubbing and subtitling combined.

Working on the basis of all European channels likely to broadcast works, and taking the selected criteria into account (nature of the channel, re-broadcasts), the European dubbing/subtitling market was estimated at 122,500 hours.

Italy, France, United Kingdom and Germany accounted for 84.67% of the Europe 20 total. And within these 4 countries, dubbing countries accounted for 60.48% of turnover.

The quality of audiovisual translation

The quality of the subtitling/dubbing work varies significantly depending on the country and on the medium. Generally speaking, sector specialists considered that the quality of the subtitling work is getting better. However, this improvement does not concern all media. Traditionally, cinema dubbing has a good reputation, with television dubbing more contrasted.

On a related note, sector professionals (translators, adapters) expressed regret at the disappearance of “context” information. Generally provided by the production houses (usually the large American studios), context information improved the quality and accuracy of the translation.
As regards the quality of the translated work, the following 3 elements should be factored in:

- **The number of hours to translate**: significant hourly volumes, currently on the increase since the number of channels broadcasting works is increasing in each country, in particular with the move to digital transmission.

- **Tariffs**: in some countries, the tariffs are stagnating, or even dropping. Competition from smaller emerging channels, the ever present temptation to outsource, as well as intense competition from translators coming from alternative and sometimes non-official circuits, have tended to exerted downward pressure on prices.

- **Deadlines**: sector professionals have noted that translators are having to work under increasingly tight deadlines.

Taken together, the three parameters yield an equation which is difficult to resolve. All the more so since the sector is characterized by an absence of productivity gains and a financial structural rigidity (the companies are often family-run, with no equity, often having to wait quite long to be paid).

**Training requirements**

Training constitutes a fundamental consideration in all discussions regarding dubbing and subtitling. In spite of the diversity of their activity (distribution, television broadcasting, technical industry, university specialists), all professionals interviewed considered that future sector development will depend to a significant extent of the quality of adaptations and of the language-transfer work done.

However, their solutions in this respect do not necessarily reflect an increased demand for training. The study noted 2 conflicting positions: some professionals consider that there are already enough (or even too many) audiovisual translation courses available given market demand; others complained about the lack of specific training for dubbing actors (Germany and Luxembourg, for example) or for audiovisual translators (Austria, Italy, Ireland, Poland for example).

This apparent contradiction can be explained firstly by the diversity of the markets in the country in question (with different markets having different levels of specialization, and therefore different training requirements) and secondly, by the training courses for these professions, which are generally learned in-house. Specific training courses in subtitling/dubbing are still a recent development, and are generally part of language programs taught in universities or specialized institutions.

Moreover, and in a general manner, sector professionals referred to the increasing competition from young graduates coming from foreign-language courses. Thanks to their solid language skills, and knowledge of translation/subtitling software applications, these graduates are managing to penetrate the audiovisual translation markets. However, since they are not as good as audiovisual translation specialists, they are considered largely responsible for the poor level of some adaptations.

**Circulation of European works**

In general, language transfer is a necessary condition to enable the circulation within Europe of non-national audiovisual works. Necessary yes, but not sufficient; in fact, the circulation of audiovisual works is not just a question of linguistic diversity specific to the European Union, and involves more complex issues related to the structure of national markets, the interests of the main system players, legal questions (territorial scope of rights) and to the promotion and marketing strategy of works.
In this respect, one must take into account that in cinema, and especially television, the general public prefers the “comfort” of the national language. Therefore, foreign countries within the same linguistic area will lead to the development of natural business partners. This phenomenon goes a large way to explaining the low-level of circulation of European works on the various European Union television markets. Moreover, most European works which are broadcast are national works. This explains why the new “Audiovisual Medias Service” directive (recital 50), suggests that member states work to encourage national broadcasters to broadcast an appropriate share of non-European works, as per article 4.

Children’s programs are a special case: they are shown dubbed in all 31 countries in the study, both in cinema and on the television (except for exceptional circumstances). This turns out to be particularly expensive in the case of countries which subtitle other works. In these countries therefore, young viewers are not really exposed to European cultural diversity; rather, they will tend to watch Japanese or American mainstream works.

The impact of the MEDIA Plus program

The purpose of the MEDIA Plus program is to support subtitling and/or dubbing of works at the distribution phase\(^2\), as well as the promotion\(^3\) of works with the following professionals: distributors (selective and automatic support), sales agents, video publishers\(^4\), broadcasters, festivals, and even producers (access to the marketplace).

The grants given by MEDIA Plus for the dubbing and subtitling of European films underpin the changes noted on the main dubbing markets, which are progressively opening to original subtitled versions.

In value terms, the 4 dubbing countries (Italy, Spain, France, Germany) receive the lion’s share of MEDIA PLUS grants. However, the volume breakdown is well-balanced and films coming out in several countries are supported. Over the period 2001/2004, the five main countries received 39% of grants (362 projects of 928 projects supported), whereas for 2004, the grants to the main countries only represented 29% of total (79 projects out of 241).

Given how these grants are awarded, it is not possible to make a direct comparison with the prices charged on the market.

Multilingualism, illiteracy and audiovisual consumption

The various language-teaching modalities, and the number of languages spoken from country to country make for a European map quite different to that suggested by the dubbing/subtitling professions. Television plays a minor role in the learning of languages; in fact, the only situation in which television could be considered to really play a role is in the case of intralinguistic subtitling (not common in Europe) combined with total immersion in the foreign country.

\(^2\) For cinema, MEDIA co-finances the costs of publishing copies, including dubbing and subtitling costs. For television: additional points are allocated to projects with dubbed and subtitled versions.

\(^3\) The costs of dubbing/subtitling supported works are entitled to grant aid from MEDIA, and such applications are encouraged.

\(^4\) Only for the period 2003-2006.
Some university specialists suggest that subtitling can have a positive effect on reducing the level of illiteracy in a country. However, a comparative analysis of data did not lead to any empirical conclusion to this effect.

**Accessibility and rights to culture and the media**

The legal provisions regarding accessibility differ very significantly between member states. When such provisions do exist, they are often the result of concerted efforts of groups representing hearing/visually-impaired persons, sector professionals, television channels and governments. As regards accessibility to cinema venues, there are some legal provisions in existence, but they are general in nature, and do not have really any practical nor technical dimension. Moreover, provisions vary a great deal since there has been no cooperation between member states to harmonize the technical aspects of accessibility.

In the case of *cinema venues*, there are very few screenings adapted to hearing-impaired persons, and even fewer in the case of visually-impaired persons. Those which do exist are generally speaking isolated initiatives, sometimes supported ad hoc by associations active in this respect or from the State. The two main problems with cinema screening are first, the lack of financing to equip the cinemas, and secondly, there are very few films being screened with audiodescriptions or subtitles for hard-of-hearing or deaf persons.

As regards *television broadcasting*, it was noted that accessibility practices vary considerably between channels. At the current time, it is not possible to obtain accurate data regarding the hourly volume broadcast in a version accessible for special-needs persons. When such policies do exist, they are aimed essentially at hearing-impaired viewers. The only channel regularly using audiodescription is the BBC (8% of its grid).

**The recent contributions of digital technology to dubbing and subtitling**

As regards the *technical companies* in the larger countries such as Germany, Spain and France, changes originating in digital technology will concern mainly work techniques and procedures: bands, transfers, and safety keys. By contrast, the creative aspects (adaptation, dubbing actors and translation) will probably not change much (except perhaps for translation software, subject to their accuracy increasing). As regards dubbing, digitization will simplify the production process (in particular, the mandatory use of the “rythmo band” which could be replaced by software applications). The companies also considered that digitization will lead to productivity gains, in particular at the administration side of things.

There is general agreement amongst *distributors* that subtitling costs (in particular the costs of burning copies), will drop significantly thanks to digital technology. A further potential and positive development concerns the available supply of products, with digital technology making for increased flexibility in subtitling. Digital technology can be used to add different subtitles to film at practically zero cost, which is of potential interest to linguistic minorities.

*Exhibitors* see the advantages of digital technology as residing in increased programming flexibility: dubbed and subtitled versions of the same film; subtitles in different languages of the same film; special versions for hearing/visually-impaired persons. Digitization also represents an opportunity to distribute products in smaller countries, linguistically less represented, and in regions along the border, as well as in urban areas with strong linguistic
minorities. However, the business model which will be required to make this feasible is not yet very solid, especially given the current cost of language transfers.

The situation of television channels as regards digital technology varies significantly from country to country. In some cases, broadcasters are just beginning to roll out digital technology (Greece, Portugal, the Baltic countries, the Czech Republic), whereas digital channels are already available in other countries (such as France, Italy, and the United Kingdom). Digitization poses different problems depending on whether one is dealing with dubbing or subtitling. The question regarding the availability of different language versions remains salient, as does the issue of the availability, in retail outlets, of suitable receivers (audio description, sound subtitling, etc.).

- **Digital Broadcasting & Multilinguism**

In terms of supply to television viewers, digital technology could lead to the development of “double versions” and “multilingual versions”. With this, a channel could, for example, broadcast a film in both dubbed version and subtitled version, with viewers selecting the version they want (assuming naturally, that their televisions have this functionality). In other cases, viewers could choose between subtitled versions in different languages.

- **Digital broadcasting and Accessibility**

For many years now, broadcasters have been looking for ways to offer better service to minorities, in particular visually/hearing impaired viewers who represent quite a significant audience share; in fact, according to studies, this category accounts for between 10% (European estimation in 2002) and 25% of the European population in 2020 (including persons over the age of 60 and persons with real sensory impairments). Research in this domain has led to the identification of 4 techniques, potentially of interest to this specific part of the population (hearing/visually-impaired for example), depending on the nature of the program (stock or streamed, information and news).
## Conclusions

### Conclusions regarding the quality of the audiovisual translation

The quality of audiovisual translation will be a major issue in the evolution of subtitling and dubbing in Europe.

The quality of audiovisual translation (time spent on research, time spent on contextual analysis, verification) is being threatened by pressure on the structural variables of the market: price, volume, deadlines.

The problems of quality of the audiovisual translation are not always caused by an insufficiency of existing training courses.

### Conclusions regarding the circulation of works

A large majority of European audiovisual works do not circulate between countries, especially on television channels.

Language transfer (dubbing/subtitling) is a necessary but insufficient condition to enhance the circulation of European audiovisual works.

The circulation of European audiovisual works is faced with technical questions when going from one medium to another in certain European countries, notably when a film subtitled for cinema release then requires a dubbed version for TV broadcast.

Within linguistic areas, the choice of distributors and broadcasters for small countries is determined by the language choices made by the leader countries. For broadcasters, there are two constraints: a) subtitling films broadcast in dubbed version on channels of countries within the same linguistic area; and b) broadcasting films for which a dubbed version does not exist, and must be paid for by the channel itself.

In several countries, European films are underrepresented in children's films catalogs.

### Conclusions regarding the accessibility of European audiovisual works

In terms of accessibility, the volume of programs available to hearing/visually-impaired persons is generally speaking very low, and does not meet the demands of this population segment. Moreover, the level of accessibility does not meet the recommendations of article 3b of the future “Audiovisual Medias Services” directive to be adopted at the end of 2007. The current business model of this sector of activity is incompatible with the requirements which are related to the implementation of this article 3b.

The absence of harmonization between technical standards concerning versions available to hearing/visually-impaired persons constitutes an obstacle to the productivity and circulation of these versions within linguistic areas.
Conclusions regarding technological research and multilingualism

An absence of dialogue between research carried out on digital technologies, notably as part of the FP7, and financed research on multilingualism, is penalizing the perspectives of future technological innovation, whereas the two fields converge as regards audiovisual broadcasting.

Recommendations

Recommendations regarding the 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 and 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 regarding the circulation of works

1. Support the creation of “packages” of linguistic versions (dubbed version + 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, thereby offering European viewers a choice between the dubbed versions and the subtitled versions of a given work in their own language. 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, right from the post-production of a work (cinema or TV), an international version (Music & Effects band), whereby the purpose of this master version would be 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 (creation of a module n° 4 in which the “packages” referred to in §1 above could be acceptable).

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. For example: a dubbed Spanish version for Latin America; a dubbed English version for TV channels where English is widely spoken (Asia, Scandinavian countries).

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. The content of the stations’ guidelines will be determining factor as regards the feasibility of this proposal.

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. This aid could be assessed via the criteria already used in MEDIA Distribution.

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**Recommendations regarding the 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 audiodescription. 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.

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**Recommendations regarding 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 (further research into the field of teaching and training, best practices).
Introduction

Framework of the Study
The purpose of the “Study on dubbing and subtitling needs and practices in the European audiovisual industry” initiated by the Information Society Directorate-General and the Education and Culture Directorate-General, is to assess the current dubbing and subtitling practices in the 31 countries participating in the MEDIA 2007 program. The study is also intended to provide recommendations regarding measures to implement at European Community level in order to encourage linguistic diversity, whilst reducing obstacles to the circulation of audiovisual works on the international market.

The question of the language transfer of audiovisual works (of which dubbing and subtitling are the two most common and best-known techniques) embraces a number of domains from translation sciences to audiovisual translation to multilingualism. Therefore, it is only natural that the choice between dubbing and subtitling for the circulation of works has always been, and will always be, a subject of heated debate, generally determined by cultural, aesthetic, epistemological, literary, and even psychological factors.

This debate however is not within the scope of this study, whose purpose is not to cast judgment on the intrinsic value of the techniques themselves, but rather to position these techniques inside the national landscape, and to explore future perspectives as regards requirements expressed by the audiovisual and cinema industries.

In fact, the only question within the scope of the research areas mentioned above is as regards the quality of the adaptation/audiovisual translation (see Part II.E - “The Quality of Audiovisual Translation”), and partially the issue of training (see Part II.E – “Training: a Real Question?”). And indeed, the (often threatened) quality of the translation work will play a central role in the future developments of the European dubbing/subtitling sector, both in terms of its competitiveness and of its capacity to encourage the circulation of audiovisual works within a single market.

However, to quote from the work of Umberto Eco, it is the very concept of “translation” which poses problems. If one agrees that the verb “translate” can be interpreted as “saying almost the same thing”, bearing in mind that one never says exactly the same thing, then Eco posits that “the problem is not really this idea of the same thing, nor that of the same thing, but rather the idea of this almost the same thing. How extendable should this almost be?”6. Even though Eco’s extremely insightful work concerns essentially literary translations, it raises a number of interesting questions for audiovisual translation. In this study, the question of audiovisual translation is assessed in the light of the current market situation, and its future perspectives.

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5 These are the 27 EU member states, plus Norway, Iceland, Liechtenstein and Switzerland. Within the EU alone, the new arrivals over the past 3 years have doubled the number of spoken languages. There are now 23 official EU languages, and over 40 languages are spoken by regional or ethnic minorities.

The Goals of the Study

This assessment of current dubbing and subtitling practices was carried out to reflect the goals of the Information Society and Media DG and, more specifically, those of the MEDIA program:
- increase the circulation of European works;
- boost the competitiveness of the European audiovisual sector;
- promote cultural and linguistic diversity.

Therefore, this study opted for an economic approach (market mechanisms analysis), in order to explore a sector (the technical industries specialized in dubbing/subtitling) which had never been the subject of a specific study up to the present time, especially on a pan-European level, englobing the 31 countries.

This approach enabled us to collect detailed information on language-transfer practices, and to go beyond the generally (poor) level of knowledge in this respect which often makes no distinction between the cinema market and the television market (even though these markets can use different techniques within a given country) and which tends to reduce language transfer techniques to dubbing and subtitling only, even though some European countries prefer to use voiceover, and even though specialized techniques to enhance accessibility of works to hearing/visually-impaired persons (subtitling for the former, and audiodescription description for the latter) corresponds to a reality which should be taken into account. This pan-European analysis led to the creation of a complex and dynamic European map (see Part I.D).

The challenges posed by the specifications of this study can be expressed 3 key questions, which structured the analysis and research work:

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

Thus, the study was structured in order to reply to these 3 key questions.

Map of the Study

The study consists of three main parts.

The first part looks at the structure of the dubbing and subtitling market; the legal situation, as well as the structure of market supply and demand are analyzed.

The second part looks at issues regarding the circulation of audiovisual works and the competitiveness of the European audiovisual industry. In particular, the MEDIA Plus program, and its impact on the circulation of audiovisual works was explored. This part also addresses issues related to accessibility of works, multilinguism, and the recent impacts of digital technology on dubbing and subtitling.
The **third and final part** features a number of conclusions emerging from the analysis of the preceding parts, and gives recommendations which could be implemented at European community level.

The **annex** consists of a glossary of dubbing and subtitling terms which will be of use to readers of the study. The annex also contains detailed country profile sheets with more information on the legal situation, training, technical industries, and sector professional practices in the country and on the practices of sector professionals in that country (distributors, broadcasters, video publishers, festivals).
Methodology

The “Study on dubbing and subtitling needs and practices in the European audiovisual industry” is the first study of its kind initiated by the European commission.

Documentary research and fieldwork (online questionnaires, qualitative discussions, case studies, participation in workgroups, and organization of a specific expert workshop on the themes of dubbing/subtitling) were the main methodological tools used to explore the structure and operation of this market, both from an economic and a judicial point of view.

The main participants in the research work, both for the cinema and the other visual markets were broadcasters, distributors, video publishers, exhibitors, festivals and technical service providers. Researchers were consulted, as were audiovisual translation and adaptation specialists.

The analysis of the legal framework entailed carrying out specific research drawing on existing documentation (professional agreements, regulatory texts, research, analysis), complemented by discussions with the professionals concerned and a number of sector organizations, active at both national and European levels.

Difficulties encountered during the economic research and how they were overcome

The study encountered 2 major difficulties as regards the economic research:

The first difficulty concerned the paucity of European statistics available in this field, and the difficulty in obtaining data sets homogenous from country to country, and from time period to time period. As an example, one need only consider the data collected by the European Audiovisual Observatory (EAO): the general table “Broadcasting Fiction” in the 2006 Directory, was drawn up for 13 countries on the basis of accurate declared information, and for a further 7 countries on the basis of estimated information, whereas this study covers the 31 member countries of the MEDIA program.

The MEDIA information itself could not be completely used due to the absence of encoding and processing by the Executive Agency of information pertaining to a number of Program lines. In fact, only the Distribution/Selective Support line could be used in an effective manner.

Lastly, in this domain, at a crossroads between language transfer and industry, the study noted the regretful absence of pan-European studies on the connections between language-transfer practices and multiculturalism, even though several university research centres are working on this question in a number of countries, but focusing almost exclusively on their own country, or even on the regional aspects (for example, in Nordic countries).

These statistics-related shortcomings made the analysis of contextual information and the creation of meaningful relationships, quite problematic.
The second difficulty originated in the sector itself and sector professionals, many of whom were unreceptive, or even entirely hostile, to the idea of divulging information. Unlike others, this particular sector has not yet really accepted the idea of transparency, and associated best practices. A number of European professionals did however participate, and the information collected is 100% reliable, even if not entirely exhaustive.

Given the above, it will be appreciated that some of the information required for this study was only possible thanks to good relationship with sector professionals.

For other contextual data, the study made a number of assumptions based on market information (European Audiovisual Observatory) checked against average professional practices (see estimation of the potential market for the number of hours - Part I C).

Moreover, since the sector evolves slowly (broadcasting of non-national European films, broadcaster grids, development of digital cinema), it was considered that results could be compared to each other over a short period.

This methodology gave us an approximate idea of the potential European market in terms of volume.

**Difficulties encountered during the legal research and how they were overcome**

In a sector so loosely structured, characterized by a myriad of very small structures, and subsidiaries inside large channels, and with a wide variety of professional practices, the general lack of knowledge regarding the legal framework, as well as the approximate nature of the framework itself, were 2 significant obstacles encountered during the research. And indeed, not many professionals questioned (associations, federations or union bodies) had accurate, detailed knowledge of their legal status, and the legislation governing their activity. Moreover, with the exception of performing artists, the various associations and federations of EU member states do not dialogue very much. Therefore, any knowledge of the legal situation was essentially limited to the given country.

In order to enable a comparative analysis, legal terms have been grouped into categories. Note however, that this classification is to be taken with caution, since the status of audiovisual translators (as well as dubbing actors) were not always readily comparable (see Part. I.A - “Legal considerations”)

Part I. The Structure of the Dubbing and Subtitling Market

A. Legal considerations

Legal diversity between countries

Not many regulatory provisions exist for the dubbing/subtitling sector taken in the broadest sense (with the exception of some countries such as France, the United Kingdom, Spain, Germany and Finland). It would however seem that, specifically in France (the only case of its kind in Europe), there is a body of legislation supporting the dubbing and subtitling industry. A more in-depth analysis of some regulations could reveal similar cases in other countries (technical services in Germany and the United Kingdom to access fiscal funds). In other words, the sector is essentially governed by voluntary agreements between businesses and professionals.

There are also specific obligations for children’s programs: these have to be dubbed in all countries studied, both in cinema and television.

From a more global point of view, it would seem that the main motivations underpinning national legislations are as follows:

1) Defending and Promoting the national language
2) Addressing the Specific situation of linguistic minorities.
3) Addressing the Specific situation of people with impairments.

Defending and Promoting the National Language

Several countries pursue linguistic policy with an audiovisual component whereby television programs must be translated into the local language, with some exceptions possible (original version screens for educational purposes, specific channel feature, foreign channels). For example, in Slovakia, the law regarding the utilization of the Slovak language no 270/1995, dated 15 November 1995 stipulates (section 5) that radio and television broadcasting must be in Slovakian or in some other language understandable to speakers of Slovakian (an implicit reference to the Czech language which is understood by the Slovaks; however, this is not a reciprocal agreement, and these broadcasters can broadcast foreign films dubbed in the Czech language).

Slovenia has a similar law (no 86/2004) regarding the public usage of the Slovenian language. This law stipulates that radio and television programs must be recorded in Slovenian inside the territory of Slovenia. Moreover, the law stipulates that any programs broadcast in another language by Slovenian broadcasters must be translated into Slovenian, without however stipulating the technique to use (dubbing or subtitling).

In Estonia, the Broadcasting Law (1994) states that public broadcasters have a duty to defend and promote the Estonian language. A specific law relating to language (1995) stipulates that films and programs broadcast in a foreign language must have an Estonian translation. The law does not state which technique should be used (dubbing or subtitling).
In Iceland, all foreign films must, at a minimum, either be subtitled into Icelandic or voiceover must be used (broadcasting law n° 53/2000 dated 17 May 2000, Chapter IV, article 8).

In Lithuania, article 34 of the law on public information measures (n°VIII - 1905) dated 2000 obligates public broadcasters to translate into Lithuanian, or to use subtitles, for radio and television programs broadcast in any language other than Lithuanian.

Bulgarian legislation obligates national Bulgarian television to broadcast in Bulgarian (radio and television law dated 1998).

In France, decree n°97/776 dated 2 September 1996 stipulates that any films dubbed outside the territory of the European Union cannot obtain a “visa d’exploitation” (commercial certificate) in France. However, since the French cinema funding system stipulates that funded projects must be shot in French to act entirely in the best interests of creation and production, most post-production operations are done in France.

The Spanish situation is somewhat unusual in that some autonomous communities have adopted audiovisual laws to encourage the cinema industry of the community in question, and the regional language via audiovisual and cinema works.

The relative importance of a given country within a given linguistic area impacts directly on the legislation and practices. Generally speaking, the legislation developed by a leader country within a given linguistic area will tend to prevail. This has led to development of a veritable technical industry aimed at the non-leading countries in a given linguistic sub-group.

Example:

French-speaking countries (France, Belgium, and parts of Switzerland and Luxembourg).

German-speaking countries (Germany, Switzerland and Liechtenstein).

Spanish-speaking countries (Spain and Latin American countries).

Portuguese speaking countries (Portugal and Brazil).

Exception: the United Kingdom with Ireland and Malta where no legislation, neither specific nor even supportive has been developed.

Case of linguistic minorities

Switzerland, Finland and Latvia have adapted specific measures to guarantee the proportional representation of various languages on their territory (double subtitling of programs). For example, the Swedish law n°143 dated 1999 stipulates that Swedish television channels must broadcast a certain minimum number of hours in minority languages.

Specific situation of persons with sensory impairments

This theme will be discussed in detail under “Accessibility Issues” below.

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7 Law 6/1999 of 1 September 1999 on supporting Galician cinema and the Galician language in audiovisual works.

Absence of a unified legal and professional status of sector workers

In terms of providers of services for dubbing and/or subtitling, two professions take centre stage: the dubbing actor and the audiovisual translator/adapter. They represent the first links in the schema of tasks and professions of audiovisual translation, and are at the heart of the creation of the language version of a work. Each of these two groups is covered by a legal regime which varies between countries.

At international level, 2 instruments exist. Firstly, the services rendered by audiovisual translators are governed by article 14bis of the Berne International Convention dated 28 September 1979 for the protection of literary and artistic works, as well as a number of Worlds Intellectual Property Organization (WIPO) treaties pertaining to author's rights and, secondly, article 2 of the Rome Convention dated 26 October 1961 regarding the protection of Performers, Producers of Phonograms and Broadcasting Organizations grants protection to performers.

At European level, the Directive 92/100/EEC of 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, the purpose of which is to give increased protection to literary and artistic property. The rights of performers are also addressed in the Directive 93/98/EEC of 29 October 1993 harmonizing the term of protection of copyright and certain related rights, amended and replaced by the directive 2006/226/EC, as well as the Directive 2001/29/EC of 22 May 2001 on the harmonisation of certain aspects of copyright and related rights in the information society. In addition, initiatives have been undertaken by the European Parliament to protect audiovisual sector artists with, for example, an adoption of a resolution to this effect on 15 May 2003.

In order to facilitate comparisons, a number of legal terms are grouped into categories, bearing in mind however that the frontiers between the categorized concepts vary significantly between countries, from being very loosely defined to having a highly detailed legal status.

To facilitate comprehension, the following professional categories have been defined:

- **Audiovisual translator and adapter**: Sometimes, these two activities can be done by the same person, or it can consist of 2 different activities. The study noted a certain degree of imprecision regarding the definition and breakdown of the tasks undertaken by an audiovisual translator, who often does the adaptation work also.

- **Concept of performing artist** (“artiste interprète”): This concept is a French exclusivity. Since directives 92/100/EEC, 93/98/EEC and 2001/29/EC, this concept is formalized at European level. In reality however, the degree of recognition of this profession varies significantly between countries.

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8 For detailed information on legal provisions on each country, refer to annex III.
between member countries. According to article 3a) of the Rome Convention dated 26 October 1961, performing artists are “actors, singers, musicians, dancers, and other persons who act, sing, deliver, declaim, play in, or otherwise perform literary or artistic works”. As interpreted by French and Belgium law, this service must have a certain importance for it to be valid since ancillary performers (example: extras under French law) do not have exactly the same level of protection as performing artists. Which is the case with dubbing actors assuming his/her participation is not entirely ancillary. In all legislations, performing artists enjoy a number of rights to the services they render.

Performing artists are defined more with respect to a given activity, or the rendering of a work or some other service, rather than on the basis of a professional qualification or an official job title. In French, English and Belgian law, the rights granted to performing artists are part of the related rights associated to authors’ rights (i.e., exclusive patrimonial right to their service, as well as a moral right, except in the United Kingdom).

The concepts of “Copyright” and “Authors rights”. The purpose of both concepts is to define the original owner of the rights. Author rights are rooted in a Romano Germanic tradition, and express the idea that a given work is intimately linked to the creator of that work. Author rights are inalienable, and are owned by the physical person who created the work. By contrast, the “Copyright” concept is rooted in Anglo-Saxon tradition, and posits that since authors have the ownership right to their creations, they are entitled to permanently assign this right to third parties on the basis of solely economic considerations.

The debates surrounding these two concepts are closely impacted by 2 theories which are at the heart of international conventions related to this question. The first of these theories establishes the concept of patrimonial rights. This theory states that authors must be remunerated for their unique creative talents. The second theory, by contrast, focuses on the bond between an author and his/her work, and stipulates that artists should have the moral rights to limit the modification and/or public performance of their work, even after transferring their patrimonial rights to a third party (a producer, for example). Thus, in a nutshell, authors under the Authors Rights regime have two types of protection: patrimonial rights and moral rights, whereas artists protected by Copyright have only patrimonial rights, without any integration the concept of moral rights.

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11 By “patrimonial rights” is understood the right to authorize, in exchange for remuneration, or the right to not authorize, the performance of a work or the reproduction of a work, by whatever means. Patrimonial rights concern: reproduction rights, radio and television broadcasting rights, cable broadcasting, public representation, adaptation, translation, public recitals, public presentation, distribution. These rights, which belong, at the outset, to the author, can be assigned in order to enable the exploitation of the work. In exchange for assigning these rights, the author will receive a financial compensation which must be proportional to the revenues generated by the exploitation of the work.

12 The purpose of “moral rights” is to protect the integrity of the work, by prohibiting any modification to the work without the author’s prior agreement. Moral rights are, in general, perpetual, inalienable, and linked to the author as a physical person, who is the only person entitled to exercise these rights. Moral rights grant the following to the original artist: respect of the artist’s name, respect of the artist’s status, integrity of the artist’s work, attribution of the ownership of the work to the author, the right to decide if the work should be made available to the general public.
Dubbing actors

Regarding dubbing actors, significant differences in their legal status and regimes were noted. A dubbing actor can be an “author” or a “performing artist” in France, Spain and Belgium, a “freelance arts worker” in France (governed by the “intermittent du spectacle” regime), an “actor” in Iceland, an “independent worker” in other countries, a “translator” in Scandinavian countries, a “reader” in Poland, and so on. The differences are based essentially in the application (or non-application) of intellectual property rules and on the existence (or non-existence) of related rights in the form of a right to additional remuneration generated by the exploitation of their works. Moreover, it should be noted that given the absence of explicit European provisions, some European Union member states do not acknowledge the moral rights of performers nor, a fortiori, those of dubbing actors. This includes countries such as Austria, Luxembourg, Germany, and Finland, where there is very little protection, as well as Switzerland (outside the EU).

Moreover, it is important to know which legal regime is used for dubbing actors. Since they sign separate contracts as freelance workers, they do not enjoy the same level of social protection as standard employees given that neither the labour law nor professional agreements (where such agreements exist) apply to them. For example, in Spain and Hungary, dubbing actors are de facto considered freelance workers.

Only Spain, France and Italy (i.e., countries with a well-established dubbing business and well-established legal framework) have prepared professional agreements with producers and dubbing actors unions. Moreover, the status of “salaried employee” is recognized only in Belgium, France, Spain, Germany, Austria and Italy. In Poland and Lithuania, only the reader (i.e. voiceover) has “salaried employee” status.

Audiovisual translators / Adapters

Firstly, the Berne International Convention dated 28 September 1979 for the protection of literary and artistic works stipulates that translators are to be considered authors. This means that their revenue is linked to author’s royalties. Even though all the countries in the study did sign the Convention, this concept (“translators considered authors”) 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. This is the case, for example, in Spain where translators of the dubbed version are considered authors, whilst translators of the subtitled version are not (and therefore do not receive any author’s royalties). The same distinction applies in Hungary where only the adapter is considered an author, and the translator is not protected by author rights.

Widely varying legislations

The study unearthed major differences as regards the remuneration criteria applied in various member states, as well as the manner in which the same service is handled. It appears that, in countries with a stable legal framework (Germany, France for dubbing, for example), there is no real reason for producers or distributors to exert downward pressure on

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13 Directive 2001/29/EC does not include the WIPO provisions, as can be seen from recital 19: “…Such moral rights remain outside the scope of this Directive…”
14 The moral rights of performing artists do not offer as much protection as the moral rights of authors.
prices. In these countries, audiovisual translators and dubbing actors enjoy a relatively favourable financial situation.

In other countries however, legislation is relatively ambiguous without any specific provisions. In practice however, regulations regarding intellectual property generally applied to dubbing actors and/or audiovisual translators. This has led 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, when signed the work contract, that the rights of the dubbing actors and audiovisual translators are transferred, without any other options available to them.

It is 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. As a result, the translators/dubbing actors are better paid even though the system is quite cumbersome to manage, entailing a significant degree of author/actor tracking.

Notwithstanding the above reservation, performing artists consider that the absence of such a system tends to lead to a situation with fixed and final payment amounts and the practically inevitable assignment of authors rights, without any other alternative.

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**Conclusions regarding the legal framework**

The Berne International Convention of 28 September 1979 regarding the protection of literary and artistic works stipulates that translators should be recognized as authors. This means that their revenue will be linked to authors’ royalties.

Regarding dubbing actors, significant differences in their legal status and regimes are to be noticed. A dubbing actor can be an “author” or a “performing artist” in France, Spain and Belgium, a “freelance arts worker” in France (governed by the “intermittent du spectacle” regime), an “actor” in Iceland, an “independent worker” in other countries, a “translator” in Scandinavian countries, a “reader” in Poland, and so on. The differences are based essentially in the application (or non-application) of intellectual property rules and on the existence (or non-existence) of related rights in the form of a right to additional remuneration generated by exploitation of their works.

In other countries, legislation is relatively ambiguous without any specific provisions. In practice however, regulations regarding intellectual property generally applied to dubbing actors and/or audiovisual translators. This has led 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, when signed the work contract, that the rights of the dubbing actors and audiovisual translators are transferred, without any other options available to them.
Accessibility Issues

Notwithstanding the considerable differences between member states, it appears that, in general, the applicable regulations and mandatory requirements do obligate broadcasters to provide services accessible to deaf and hard-of-hearing persons, extended in some countries to include blind and visually-impaired persons. The differences between member states should be reduced by the transposition, into national legislation of the new “Audiovisual Medias Service” Directive (former “Télévision sans frontière” Directive), specifically article 3 b). However, this article is not binding on member states, and aims at simply getting them to encourage media service providers to gradually make their services accessible to visually/hearing impaired persons. This latter point enlarges the scope of the recommendation for a number of member states where regulations oblige broadcasters to make their services accessible only to deaf and hard-of-hearing persons (i.e. no mention of visually-impaired or blind persons).

The question of accessibility merits special attention in this study. As mentioned above, accessibility is first and foremost a political question, but it is also a financial and technical concern since solutions to enhance accessibility use subtitling for visually-impaired persons, but also audiodescription and other specific technologies, all of which have a specific cost. Therefore, as part of this study, it was decided to inventory existing provisions encouraging accessibility to hearing/visually-impaired persons.

At international level, the United Nations approved, on 13 December 2006, an international convention promoting the rights of persons with disabilities, article 30 of which stipulates that the signatories should implement the necessary laws and measures to improve the rights of handicapped persons, and abolishes laws, traditions or practices which could be considered discriminatory. This convention was circulated for signing on 30 March 2007, and will enter into effect when 20 countries have ratified it.

At European level, a number of texts should be mentioned. One of the most important ones is the Universal Service directive applicable to electronic communications. Another text of note is the “eAccessibility working paper of 13 September 2005 from the European commission, as well as the “eInclusion Union Council declaration, unanimously approved during the Riga Interministerial Conference on 13 June 2006, by member states ministers, as well as by EU applicant countries, and European Free Trade Association (EFTA) countries, which addresses the setting up of a European legal framework to promote accessibility.

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15 Article 3ba: “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”.
16 See country profile sheets with info on equal access (given in the annex).
17 Article 30 – Participation in cultural life, recreation, leisure and sport
1. States Parties recognize the right of persons with disabilities to take part on an equal basis with others in cultural life, and shall take all appropriate measures to ensure that persons with disabilities:
   (a) ...
   (b) Enjoy access to television programmes, films, theatre and other cultural activities, in accessible formats;
18 The directive 2002/22/EC on “universal service and users’ rights relating to electronic communications networks and services” of 7 March 2002 aims to encourage access of persons with disabilities to telecommunications services.
19 SEC (2005)1095/COM 2005 (425). The European Commission gives suppliers two years to make their products accessible, failing which, the Commission will pass legislation to this effect.
21 Norway, Lichtenstein, Iceland.
Moreover, as part of negotiations on the new “Audiovisual Media Services” Directive, the European Parliament insisted on the inclusion, in the text, of an article encouraging member states to enhance the accessibility of hearing/visually-impaired persons to audiovisual media services. This will be the subject of article 3 b) of the new Directive.

The study revealed a high level of disparity between member states as regards provisions governing accessibility. That such provisions exist can be attributed to the concerted efforts by groups representing people with visually/hearing impairments and other professionals, as well as TV channels and governments. It is important to underline that the degree of legislation in this domain is an entirely separate question, and does not depend on the geographic area of the countries concerned nor even on their audiovisual translation tradition (dubbing or subtitling).

As regards subtitling for deaf and hard-of-hearing persons: Belgium, Spain, France, Norway, the Czech Republic, the United Kingdom and Slovakia are quite advanced. The types of obligations currently existing can be described as follows:

- Laws on disabled persons and minorities (Germany, Belgium, Cyprus, Spain, France, United Kingdom).
- Laws on television and radio programs (Germany at Länder level, Spain, Greece, Gasparri law in Italy, law on the medias in Holland, Portugal, Czech Republic, United Kingdom, Slovakia).
- Public service contract (RTBF and VRT management contract in Belgium, DR and TV2 public television stations contract in Denmark, YLE station contract in Finland, RAI service contract in Italy, contract with the SVT station in Sweden).
- Internal regulations of TV channels (Latvia, Poland, United Kingdom).
- The cinema sector is different, and obligations in this respect originate in general provisions.

Regarding audio description for blind and visually-impaired persons: the United Kingdom is very advanced in this respect, and has introduced legal obligations aimed at broadcasters, with audience ratings and other targets to reach. In addition, there is a special fund intended for “vulnerable” persons set up by the English government in September 2005 to facilitate the purchasing and installation of digital television equipment for audiodescription.

The Czech Republic, Italy and Slovenia also have regulatory provisions in this respect, but these are much more general. Sweden, Belgium and Germany do not have provisions per se, but rather recommendations. In France, the idea of introducing such regulation for cinemas is currently being assessed, while in Spain, an audiovisual law with audiodescription targets is currently under development, and technical standards have already been developed and

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23 This fund is called the “Help Scheme”; for details, see http://www.digitaltelevision.gov.uk/sscheme/sscheme_home.html
accredited as good practices guides (example: technical standards for audiodescription UNE 153.020:2005).

Regarding accessibility to cinemas\textsuperscript{24}: the few provisions which do exist are very general, void of any practical or technical dimension. Moreover, these provisions vary considerably from country to country, and no attempt has been made to harmonize accessibility techniques. On a similar note, incentive schemes to complement the few regulatory measures which exist are few and far between, and vary significantly. Most of the measures which have been taken result from initiatives taken by associations and/or exhibitors in order to make up for legislative shortcomings.

Some countries, such as Denmark, have set up policies to increase accessibility in cinemas. The Danish Film Institute awards grants to cinemas who set up magnetic loops for hearing-impaired persons, and is also planning to set up a grant scheme to encourage the subtitling of Danish films for deaf and hard-of-hearing persons. The country most advanced in this domain is, once again, the United Kingdom; it is the only country which actively encourages the installation of subtitling and audiodescription systems and it is the only country where one notes real growth in the retailing of these subtitling and audiodescription systems. This has been made possible thanks to close collaboration between companies developing technical systems, distributors, exhibitors and the government.

Generally speaking, in those countries 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\textsuperscript{25}.

<table>
<thead>
<tr>
<th>Conclusions regarding questions of accessibility</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>For broadcasters</strong></td>
</tr>
<tr>
<td>Current obligations can be grouped into the following categories:</td>
</tr>
<tr>
<td>- Laws for minorities and disabled persons.</td>
</tr>
<tr>
<td>- Laws for broadcasting on television and radio.</td>
</tr>
<tr>
<td>- Public service contract.</td>
</tr>
<tr>
<td>- TV channels internal regulations.</td>
</tr>
</tbody>
</table>

| **For cinema**                              |
| As regards accessibility to cinemas, the few provisions which do exist are very general, void of any practical or technical dimension. Moreover, these provisions vary considerably from country to country, and no attempt has been made to harmonize accessibility techniques. Most of the measures which have been taken result from initiatives taken by associations and/or exhibitors in order to make up for legislative shortcomings. |

Generally speaking, in those countries 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.

\textsuperscript{24} Handicap et Cinéma en Europe, CNC Statistics Service – July 2003.

\textsuperscript{25} For an analysis of language-version practices for hearing/visually-impaired persons in cinema and television, refer to Part II.F.
B – Analysis of Market Supply

The dubbing/subtitling technical industries are at the heart of the language-transfer process. Responsible for the work right from the adaptation\textsuperscript{26} step, they handle the creation and supply of subtitled/dubbed movies for cinema release, television broadcasting, video/DVD publishing, festival screenings, and so on.

There are a number of configurations possible. Some companies are specialized in just a single language-transfer technique (dubbing or subtitling) while others do both. For some companies, dubbing/subtitling is their sole activity, whilst for others, it is just one activity in a more broad ranging audiovisual postproduction environment (generally the case in Eastern European countries)\textsuperscript{27}.

In the case of the cinema distribution, sales agents (for subtitling in English) and distributors (for subtitling or dubbing in the national language) are the main contact persons of the technical companies. If the film is to be screened in a festival, but has not yet been released in the country in question, the festival will get the work subtitled.

The television broadcasting situation is more complex: in some countries, and depending on the size of the TV channel, there will be a specific dubbing/subtitling service within the channel itself. Note however that the decision to do subtitling/dubbing internally (or to subcontract it out) depends to a significant extent on the size of the channel and its legal status (public channels for smaller countries).

If an internal dubbing/subtitling service does not exist, the channel will use an external technical company if the work to be translated has never been broadcast in the country (neither cinema release, nor on other channels). If the channel purchases a work which has already been screened in the country (for example, a non-national film already released in cinemas), a number of situations are possible:

- The station can use the subtitled/dubbed version which already exists. Any necessary technical adjustments (change from cinema screen to TV screen, with reduction in the number of characters available for each plan) are sometimes catered to by the distributor and sometimes by the channel. This option is favoured particularly when the broadcaster knows that it can trust the quality of the language transfer in the country, which in any case is always checked by the channel (for example, in Germany with ZDF, or in Estonia with public television). Other factors can reinforce this practice: in Hungary, for example, where the viewers are used to hearing the voices of the “traditional” dubbing artists, channels which air old movies, already dubbed, do not re-dub.
- Sometimes however, the channel will prefer to re-do the subtitling or dubbing, especially if the channel considers that the current version does not meet its standards, or when differences between technical standards make it easier to completely redo the subtitling, rather than use the existing subtitled version. This situation was cited by several professionals in countries such as Slovakia, Bulgaria and Romania. In the United Kingdom, channels such as the BBC have a long tradition of good-quality

\textsuperscript{26}This is the most common situation; however, there are some exceptions, notably Denmark, Finland, Norway and Sweden. In these countries, distributors work directly with audiovisual translators, leaving dubbing/subtitling companies just the “technical” part of the work.

\textsuperscript{27}For details on sources used when researching the technical industries, refer to Annex VI.
subtitling, which leads them to re-subtitle films that they purchase. This can be contrasted with other British channels with fewer financial resources, who will tend to use the version already subtitled.

The European technical industries landscape: a dual, atomized sector

The European dubbing/subtitling technical industries landscape varies more or less according to the economic weight of each country. The concentration of the national market for dubbing and subtitling is described using the following categories:

- Category 1 = market highly concentrated (over 80% of turnover generated by the 3 leading companies).
- Category 2 = market concentrated (over 50% of turnover generated by the 5 leading companies).
- Category 3: market not concentrated (less than 50% of turnover generated by the 5 leading companies).

The major audiovisual markets such as Germany, Great Britain, France, Italy, and Spain are characterized by a large number of companies active in the technical industries, and a relatively low concentration rate (less than 50% of the market turnover generated by the five leading companies). This analysis must however be somewhat qualified for the laser subtitling markets, the technique most frequently used for the distribution of films in cinemas; in this sector, either Category 1 (over 80% of turnover generated by three leading companies) or Category 2 (over 50% of turnover generated by the five leading companies) concentration level. This can be attributed mainly to the high cost of setting up the technology required for laser subtitling. The situation will almost definitely change due to the increasing penetration of digitization technology in cinemas; were the 35mm copy for cinema screening to be no longer used, this would lead to the disappearance of laser subtitling, which would in turn lead to profound upheavals for companies active in this market.

As regards the smaller European markets, there are fewer dubbing/subtitling companies. These countries can be divided into three groups: Western Europe countries, Eastern Europe countries and countries which, for reasons of linguistic, cultural and economic proximity, depend significantly on a country whose audiovisual market is more developed.

A handful of exceptions notwithstanding, Western European and Eastern European countries with a relatively independent audiovisual industry are characterized by a high concentration rate (Category 1 or Category 2) both for dubbing and subtitling. The difference between these two country groups is as regards the level of specialization: Western European companies are generally specialized in dubbing or subtitling, whereas most Eastern European companies offer dubbing and/or subtitling as one service amongst many others (often related to audiovisual postproduction).

Regarding those countries whose market depends significantly on another country with a more developed audiovisual market:

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28 Research revealed a total of 631 companies in Europe.
29 Leading companies were listed on the basis of general agreement amongst sector professionals. The number of leaders in each market was limited to 5 companies per activity (i.e., subtitling and dubbing).
• Liechtenstein, Austria, and German-speaking Switzerland depend significantly on Germany for dubbing. French-speaking Switzerland depends on France and Italian-speaking Switzerland sources products for “its market” from Italian distributors.
• French-speaking Belgium, Luxembourg, and French-speaking Switzerland depend significantly on France (especially for dubbing).
• Cyprus depends significantly on Greece.
• Ireland and Malta depend significantly on the United Kingdom.

In these countries, subtitling/dubbing activities are limited essentially to television broadcasting and the DVD. Average-size European audiovisual markets such as Austria, Switzerland, Belgium and Ireland have a relatively high number of companies active in this sector with a relatively low level of concentration (category 3). Small countries (Luxembourg, Liechtenstein, Cyprus and Malta) do not really have a national industry; at most, national TV channels have in-house dubbing/subtitling services, or else they use freelance translators.

In addition, some companies, via external acquisitions, or the creation of subsidiaries, have succeeded in developing a network in several countries.

In particular:
• Broadcast Text: Swedish company specialized in subtitling. Active in Sweden, the United Kingdom, the Netherlands, Belgium, Hungary, Denmark, Finland, Norway, and the Czech Republic.
• CMC/LVT: French company specialized in subtitling. Active in France, Germany, Bulgaria and Poland. CMC/LVT also invented a subtitling machine which is exported worldwide, especially in countries with automatic subtitling of specific languages (Japanese, Arabic, Chinese).
• Dubbing Brothers: French company specialized in dubbing. Active in France, Belgium, Italy, Germany, Spain, and the United States.
• Eurolab: Danish company specialized in subtitling. Active in Denmark, Sweden, Finland and Norway.
• SDI Media/Sun Studio: The world leader in audiovisual translation. Since 2004, SDI Media has been controlled by the American investment group Warburg Pincus LLC. The acquisition of the Danish company Sun Studio in September 2006 consolidated its presence in Europe, and the group now operates through one (or both) of its companies in the following European countries: the United Kingdom, Belgium, Czech Republic, Denmark, Estonia, Finland, Iceland, Latvia, Lithuania, Norway, the Netherlands, Poland, Slovenia, Sweden.
• Sub-ti: English company specialized in electronic subtitling for festivals. Active in Italy, Spain, France, Portugal, Germany and Austria.
• Technicolor: the American company Technicolor operates in the United Kingdom, Italy, Spain, and the Netherlands, providing dubbing and/or subtitling services depending on the country.
• Titra Film: French laser subtitling specialist. It operates in France and Belgium.
• Titra: an American company with a market positioning similar to its French homonym. Active in the United States, Greece, the Netherlands, Denmark, Switzerland, Austria, Portugal, England (Capital FX), Israel and Japan.
• VSI International: English Company Active in England, Germany, Italy, the Netherlands, France, Spain, and Sweden.
• Al Media Movers Inc: a case apart in that the company does not have its own operations in Europe; rather, it has a team of European partners, thanks to which a sizable portion of its turnover is generated in Europe. Its main revenue comes from Germany, Italy and
France, with Belgium, Hungary, Poland and Romania acting as secondary sources of revenue.

**Tarification: lacking in transparency**

The question of tarification is to be treated with caution. Each work is special, unlike no other: the duration of the work and the quantity of the dialog can vary significantly, which impacts on the cost of subtitling/dubbing. In addition, some languages are more commonly spoken: translating from and to common languages (English, Spanish or Italian) is less expensive than translating from and to rare languages (Slovakian, Hungarian or Bulgarian).

In particular, the study revealed that several companies quite simply refuse to divulge information which they consider within the realm of professional secrecy. Since no price catalogue is publicly available for number of reasons (negotiations with actors and translators, special tariffs for some customers, discounts indexed to volumes handled, etc.), this issue had to be approached with circumspection, with the findings based on professional trust placed in the consultant, and by cross-comparisons with companies issuing orders (distributors) and TV channels.

An analysis of prices charged for dubbing/subtitling services points to major differences between countries.

**As regards subtitling**, 4 major country groups were identified:
- The major audiovisual markets which are France (including Belgium, Luxembourg and Switzerland) and Germany (including Austria and Liechtenstein) where dubbing is predominant, and where prices paid for subtitling are relatively high (15 to 20€ per minute of subtitling for television broadcasting).
- The major North European audiovisual markets which are the Netherlands, Denmark and Sweden, where subtitling is predominant, and where prices are a little lower (10 to 15 € per minute of subtitling for television broadcasting).
- European Countries (Spain, Italy, Portugal); peripheral northern European markets (Norway, Iceland, Finland) and some East European countries (such as Poland and Slovenia) where prices are significantly lower (5 to 10 € per minute of subtitling for television broadcasting).
- The prices practiced in most Eastern European countries are amongst the lowest in Europe (less than 5 € per minute of subtitling for television broadcasting).

**As regards dubbing**, 3 major country groups were identified:
- Over 200€ per minute of dubbing for television broadcasting: the major European audiovisual markets.
- Between 80€ and 200€ per minute of dubbing for television broadcasting: most West European countries.
- Less than 80€ per minute of dubbing for television broadcasting: most East European countries (bearing in mind that in many of these countries, voiceover is the most common technique used for television broadcasting).

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Details of tariffs charged in each country are given in annex II.
In order to further research this sensitive aspect of the study, and get a clearer understanding of the issues at stake as regards audiovisual translation work for cinema, European distributors in the 31 countries covered by the study were contacted. Unfortunately, it was not possible to source any interesting information from the following countries: Austria, Belgium, Switzerland, Cyprus, Greece, Ireland, Liechtenstein, Lithuania, Luxembourg, Malta, Poland, Romania, and the United Kingdom. The observations made below therefore do not apply to these countries.

On the basis of those European distributors who did reply to the queries regarding dubbing/subtitling costs, the following 3 major country groups were established:

- **Countries with a significant dubbing/subtitling market:** France, Germany, Spain and Italy. This group is noteworthy in that its’ subtitling costs are almost double the European average. France has the highest subtitling costs in Europe (7500€ on average for a 90-minute movie\(^\text{31}\)). The dubbing costs for most countries in this group are somewhat above the European average (34,900€ compared to 31,300€; i.e., 11% more expensive). It was noted however that, at 24,500€, dubbing costs in Spain are below the European average.

<table>
<thead>
<tr>
<th></th>
<th>Average cost for the group</th>
<th>Average cost in Europe</th>
<th>Group/Europe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subtitling</td>
<td>5,300€</td>
<td>2,700€</td>
<td>196 %</td>
</tr>
<tr>
<td>Dubbing</td>
<td>34,900€</td>
<td>31,300€</td>
<td>111 %</td>
</tr>
</tbody>
</table>

Source: MCG – Results of a study carried out amongst distributors of the 31 European countries in the study

- **Nordic countries:** Norway, Finland, Sweden, Denmark and the Netherlands. This group is characterized by very high dubbing costs (66% more expensive than the European average). Norway has the highest dubbing costs in Europe (on average 75,000€ for a 90-minute movie). Subtitling costs in the group reflect the European average, ranging from 1750€ in Norway to 3150 € in Finland.

<table>
<thead>
<tr>
<th></th>
<th>Average cost for the group</th>
<th>Average cost in Europe</th>
<th>Group/Europe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subtitling</td>
<td>2,600€</td>
<td>2,700€</td>
<td>96 %</td>
</tr>
<tr>
<td>Dubbing</td>
<td>52,000€</td>
<td>31,300€</td>
<td>166 %</td>
</tr>
</tbody>
</table>

Source: MCG – Results of a study carried out amongst distributors of the 31 European countries in the study

- **Central & Eastern European Countries (CEEC):** In this country group, the costs of dubbing and subtitling are well below European averages (45% and 30% respectively). Slovenia is somewhat an exception though, where the average cost of dubbing and 90-minute movie is 35,000€.

\(^\text{31}\) The costs are a 90-minute film with about 900 subtitles and include the following costs: In the case of subtitled films => the copy; the translation of dialogs; technical costs. In the case of dubbed films => the copy, the translation of dialogs; the dubbing actors.
Comparison of average dubbing and subtitling average costs of this group compared to European averages, for a 90-minute movie (in €)

<table>
<thead>
<tr>
<th></th>
<th>Average cost for the group</th>
<th>Average cost in Europe</th>
<th>Group/Europe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subtitling</td>
<td>1,900€</td>
<td>2,700€</td>
<td>70 %</td>
</tr>
<tr>
<td>Dubbing</td>
<td>17,300€</td>
<td>31,300€</td>
<td>55 %</td>
</tr>
</tbody>
</table>

Source: MCG – Results of a study carried out amongst distributors of the 31 European countries in the study

Iceland and Portugal do not fit into any category if seen through the prism of cultural similarities/geographical proximity between countries.

In Iceland, subtitling costs are similar to other Nordic countries (on average 3000€) but dubbing costs are amongst the lowest in Europe (7000€). Consequently, the tariffs generally observed in Iceland are more in line with those of CEEC countries, rather than Nordic countries.

In Portugal, dubbing and subtitling costs are strikingly similar to those in Slovenia (1400 and 35 000€ respectively on average for a 90-minute movie).
Country mapping according to average dubbing and subtitling costs in cinemas for a 90’ film

Distributors’ statement

The size of circles depends on the number of dubbing/subtitling companies in the country
Sector turnover

The table below summarizes the turnover per country for dubbing/subtitling. It can be considered an estimation of the audiovisual transfer market in European countries. Estimates for 20 countries were prepared; however, Spain is missing from the list of dubbing countries, as are countries such as Poland and Portugal for subtitling.

For each country (whenever information was available), a minimum estimate and a maximum estimate were made on the basis of declarations made by sector players regarding their turnover and stated market shares, while taking into account well-established existing companies who were not willing to divulge any information. The total turnover for 2006 for the 31 countries surveyed varies between 372 million € (minimum estimate) and 465 million €uro (maximum estimate). More detailed research carried out on a number of the bigger countries (France, United Kingdom) were used to consolidate estimates.

<table>
<thead>
<tr>
<th>Country</th>
<th>Minimum estimate</th>
<th>Maximum estimate</th>
</tr>
</thead>
<tbody>
<tr>
<td>AT</td>
<td>0.5</td>
<td>0.8</td>
</tr>
<tr>
<td>BE</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>BG</td>
<td>3</td>
<td>5</td>
</tr>
<tr>
<td>CH</td>
<td>3.8</td>
<td>5</td>
</tr>
<tr>
<td>CZ</td>
<td>9.5</td>
<td>11</td>
</tr>
<tr>
<td>CY</td>
<td>0.1</td>
<td>x</td>
</tr>
<tr>
<td>DE</td>
<td>90</td>
<td>110</td>
</tr>
<tr>
<td>DK</td>
<td>15</td>
<td>20</td>
</tr>
<tr>
<td>EE</td>
<td>0.5</td>
<td>1</td>
</tr>
<tr>
<td>ES</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>FI</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>FR</td>
<td>80</td>
<td>85</td>
</tr>
<tr>
<td>GR</td>
<td>3</td>
<td>3.5</td>
</tr>
<tr>
<td>HU</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>IE</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>IS</td>
<td>1.8</td>
<td>2.5</td>
</tr>
<tr>
<td>IT</td>
<td>55</td>
<td>65</td>
</tr>
<tr>
<td>LI</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>LT</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>LU</td>
<td>1</td>
<td>1.5</td>
</tr>
<tr>
<td>LV</td>
<td>0.9</td>
<td>1.3</td>
</tr>
<tr>
<td>NL</td>
<td>8</td>
<td>11</td>
</tr>
<tr>
<td>NO</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>MT</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>PL</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>PT</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>RO</td>
<td>0.5</td>
<td>1</td>
</tr>
<tr>
<td>SE</td>
<td>9</td>
<td>11</td>
</tr>
<tr>
<td>SI</td>
<td>0.4</td>
<td>0.8</td>
</tr>
<tr>
<td>SK</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>UK</td>
<td>90</td>
<td>130</td>
</tr>
</tbody>
</table>

**TOTAL** 372 465.4 M€

32 The county-by-country details are given in Annexe II.
These figures can be analyzed in the light of the following:

- Turnover for European broadcasters in 2004 was 66,565 million € (Europe 25).
- Box office turnover for European cinemas in 2004 was 5724 million € (Europe 25).
- DVD/VHS (rental + retail) turnover in 2004 was 12,266 million € (Europe 25)\(^3\).

On the basis of currently available information, it is very difficult to establish a relationship between overall turnover for the dubbing/subtitling sector, and the turnover of clients for whom these language versions were prepared. The wide diversity of sectors, the difficulty of sourcing reliable databases, and the risk of over-estimating the financial contribution due to language versions as they move between media, all combine to make such an attempt relatively fruitless.

Notwithstanding the preceding, it is however possible to establish a general idea of size. Taking the average total market value of 400 million € as the starting point, then it can be calculated that the language-transfer sector represents:

- 0.6 % of broadcaster turnover (even though dubbed/subtitled works represent at least 50% of their program grid);
- above 7% of exhibiter turnover (from which must be subtracted, for each country, the turnover corresponding to national films or films whose original version comes from the same language group);
- 3.2% of turnover of video publishers.

As can be seen from above, providing audiovisual works in a language other than that of the country where the work is broadcast/screened/published corresponds in reality to a very small portion of the turnover, regardless of the medium, and without there being any rapport with its cultural or commercial importance.

The four major countries represent 84.67% of the total Europe 20 turnover. The United Kingdom is the main market, accounting for a significant portion of the overall dubbing/subtitling work, carried out on request from the American majors, as well as European companies. One notes here the impact of the previous version of the Sales & Leaseback law (financing of coproductions with the United Kingdom) which encouraged many European producers to have in-lab sound work carried out in the United Kingdom so as to enable the work to be considered an English work.

Within this group consisting of the major countries, the dubbing countries (Germany, France, Italy) represent 60.48% of turnover for Europe 20.

This turnover represents the entire dubbing and subtitling activity undertaken by the sector. Our analysis of the market demand (see §C - “Analysis of Market Demand”) reveals that 70% of works requiring a language transfer are non-European. Using this as a calculation basis, one can conclude that the share of sector turnover originating in European works stands at 30%, corresponding to an amount of between 111.6 million € (minimum estimate) and 139.62 million € (maximum estimate).

\(^3\) Source: European Audiovisual Observatory – Directory 2006.
Market evolution: internationalization and outsourcing

There can be no doubt that the internationalization of the technical industries activity is now the key factor conditioning development of sector businesses. This is mainly due to the development of international customers selling their programs in several countries. Based on discussions with surveyed companies, economies of scale, notably as regards subtitling, will only be possible if the volume of work handled is increased. This means staying with customers in the countries where they set up (such as Discovery Channel). This practice also enables the parallel development of a base of local customers.

The necessity to recoup investments by increasing volumes has led to price wars between companies, including an acceptance of reduced profit margins when working for prestigious clients such as the BBC. The bankruptcy of the Belgian dubbing company “Made in Europe” subsequent to the departure of its main customer is a significant case in point.

The nature and practices of the dubbing sector vary significantly between countries. Therefore, there is not really so much outsourcing. That said, a certain level of outsourcing was observed between France and Belgium, as well as in the case of Germany, essentially practiced by leading subtitling companies, established outside the country (Switzerland, France and Austria). The study identified some outsourcing in the United Kingdom, a consequence of the previous “Sales & Leaseback” scheme which encouraged coproducers to have work carried out in sound laboratories in the United Kingdom. The study also identified outsourcing in Hungary and the Czech Republic to companies in the vicinity of the border areas, thereby accessing the more competitive market tariffs practiced in Slovakia and Romania.  

Some dubbing companies reported a “bipolar” situation with, on the one hand, some orders for top-range work (hertzian TV channels), and others for bottom-range work (cable TV channels). In addition to this two-tiered demand, it was noted that the internationalization trend impacts mainly the bottom-range work. For example, in Baltic countries, the market consists essentially in large dynamic companies operating at an international level, co-existing with garage studios (students, freelancers, etc.).

The French situation is quite particular, in that translation professionals are heavily protected. Translators are well paid and no Belgian translator has managed to penetrate the French market even though Belgian tariffs are half those of France. Moreover, dubbed and subtitled works for the French cinema are considered “prestigious products” for which customers are prepared to pay a high price, and it would seem that there is a tacit agreement between sector companies not to start price wars.

The Hungarian situation is also quite peculiar. Its dubbing industry is currently in a critical phase. The prices paid by the TV channels have remained unchanged for 15 years, unlike taxes, social charges and electricity. The Actors Union is trying to secure an increase in the prices paid for dubbing work, and even recently went on strike. It can be assumed that

34 The study discovered that “Dubbing weekends” are organized; dubbing actors, paid a fixed and final amount, are taken over to the country for the weekend, along with their family, with board and food paid. As confirmed by case studies and discussions, the same weekend work practice exists between France and Spain.

35 In Lithuania, sector companies consider that the best way to resolve the costs issue would be to change from voice-over to subtitling for television broadcasting.
Hungary may well have to face a serious crisis of audiovisual content in the years to come if work conditions do not improve.

**Conclusions on the Analysis of Market Supply**

The European dubbing/subtitling technical industries landscape varies more or less according to the economic weight of each country within Europe. The study estimated the number of dubbing/subtitling companies to be 631.

In the large countries, the dubbing market is quite competitive, and the laser subtitling market (i.e., the most commonly used subtitling technique for cinema releases) is much more concentrated, corresponding to either Category 1 (over 80% of turnover generated by the 3 leading companies) or Category 2 (over 50% of turnover generated by the 5 leading companies).

Most Western European countries are specialized in either dubbing or subtitling, whereas most Eastern European countries offer dubbing and/or subtitling as one service amongst many others (often related to audiovisual postproduction).

There can be no doubt that the internationalization of the technical industries activity is now the key factor conditioning development of sector businesses. This is mainly due to the development of international customers selling their programs in several countries. Based on discussions with surveyed companies, economies of scale, notably as regards subtitling, will only be possible if the volume of work handled is increased. This means staying with customers in the countries where they set up (such as Discovery Channel). This practice also enables the parallel development of a base of local customers.

The tariffs charged for technical services vary significantly between countries. Three major country groups were identified:

- **Countries with a significant dubbing and subtitling market**: France, Germany, Spain and Italy. This group is characterized by subtitling costs almost double the European average.

- **Nordic countries**: Norway, Finland, Sweden, Denmark and the Netherlands. This group is characterized by very high dubbing costs (66% more expensive than the European average).

- **Central & Eastern European Countries (CEEC)**: in this country group, the costs of dubbing and subtitling are well below European averages (45% and 30% respectively). Slovenia is however an exception.

- **Iceland and Portugal do not fit into any category** if seen through the prism of cultural similarities/geographical proximity between countries.
C – Analysis of Market Demand

The cinema market

Sales agents

Responsible for selling a work on the international markets, sales agents are companies which sell the distribution rights of audiovisual works outside the territories in which the work was produced.

In order to sell their films, they use original versions subtitled in English. In general, they handle the subtitling into English, as this increases the chances of distributors taking up their film.

In most countries, sales agents will have the “international version”. Seen from a technical perspective, this term designates a copy of film with the Music & Effects track (M&E). This consists in one track with all sound effects and another track with the music, thus keeping them separate from the voice track. Thanks to this separation of tracks, it is possible to sell the work in countries which prefer dubbing, or to TV channels, most of which prefer to broadcast a version dubbed into the national language.

In some cases, the sales agent can envisage a second subtitling. For example, in the case of internationally well-known festivals, the sales agent might be obligated to get another subtitling done on the work (in addition to a subtitling into English), this time into the language of the festival country. When this occurs, the subtitling will be carried out in partnership with the local distributor of the film (if one has already been signed up for the film when the festival starts) or else the subtitling can be handled by the festival (for example, the “Panorama” section in the Berlin film Festival).

Subtitling into a second language can be considered a move to enhance the chances of selling the film, since it has a significant impact on less well-known films and serves to boost the business of smaller distributors. It can also increase the penetration potential of the work in the second market (TV, DVD, Internet). And subtitles make it easier to sell the work to TV channels, especially theme channels, as well as satellite and cable channels.

In other cases, the sales agent might have the work dubbed into English. This can also facilitate sales, and is not unusual when selling animation and genre films. Celluloid Dreams

36 In some countries, the M&E version is not done during the final post-production of the film, even though the cost of preparing such a version at this stage is very low (limited extra time in the laboratory and cost of the medium). Therefore, the vendors in these countries do not have a sales version for dubbing countries where an M&E version is required in order to prepare the local dubbed version. Under these circumstances, re-doing an M&E following the post-production stage can be a lot more expensive (about 10,000 €). In fact, these prices correspond to prices on the French and Italian markets for heritage films (generally speaking prior to 1980) which did not have an IV, and had therefore to be sent back to the laboratory.

37 For example, the Cannes International Film Festival stipulates that all participating films must be subtitled in French, and the Berlin film Festival requires German-language subtitling for all films competing and in the Panorama section.

38 In other festivals, the subtitling into the local language is always handled by the Festival (see the Festivals section below).
describes the recent case of *Persepolis*[^39], an animation film originally made in French, but for which a dubbed version in English was supplied by the sales agent, which enhanced the sales of the film, notably in the Middle East and Asia.

Last, but not least, dubbing into Spanish can be a way to increase sales in Spanish-speaking countries in Latin America.

In a nutshell therefore, one can say that, for the purposes of this study, the most common sales agent activity concerns subtitling their films in English. They will however get a second subtitled version done when presenting their films at major festivals such as Cannes or Berlin. Lastly, in some rare and very specific situations (animation films, genre films), sales agents will provide a dubbed version.

Once the film has been sold, sales agents no longer really consider themselves concerned by language-transfer issues; they consider that the local distributor is the best informed party to arbitrate between subtitling and dubbing, depending on local practices. In order to facilitate translation of the original version, sales agents provide distributors with the dialog list, in the original version and in English, and the spotting list, which is used to position subtitles.

The quality of the adaptation work in the languages of the various countries where the film is sold does not directly concern sales agents. However, on some occasions, they have remarked the quality of the adaptation work could be better. In fact, it is important to know whether the translation is done from the original film language or from the English version; if the latter option, then the work is a translation of a translation, which could explain the poor quality of some adaptations.

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### Sales Agents

Responsible for selling a work on the international markets, sales agents use original version copies, subtitled in English.

In most countries, the sales agents will have the “international version” of the work (i.e., Music & Effects track separated from the voice track) which means that the work can be sold to countries where the language-transfer preferences are for dubbing rather than subtitling, or to TV stations which generally speaking prefer to broadcast the work dubbed into the national language.

**Strategies to facilitate sales:**
- Creation of a subtitled version in another language (mandatory for festivals + strategy to boost sales into the second market).
- Dubbing into English (for some animation or genre films).
- Subtitling into Spanish (for the Latin American markets).

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**Distributors**

Owners of the distribution rights of films in their countries, distributors handle the subtitling for the local distribution of their films. Therefore, distributors work directly, and closely, with dubbing/subtitling companies.

Also, it is the distributor who decides (assuming there is a choice to make in the first place) if the work is to be released in the original version with subtitles or as a dubbed version.

In some countries however, there is no choice to be made: the dubbing or subtitling tradition is so strong that the language transfer always takes place in the same way. For example, in Scandinavian countries, subtitling predominates, the only exception being children’s films.

In some countries, a number of changes currently in train mean that the distributor really can make a choice. Note however that this concerns only countries with a predominantly dubbing tradition and the study did not point to any countries abandoning a subtitling tradition to the benefit of dubbing.

The decision to dub or subtitle will be made on the basis of the following considerations:

- **Commercial potential of the film**: the more mainstream the film, the more likely it is to be dubbed. Whenever a film aims to bring in as many people as possible, and must therefore be viewed nationwide and not just in those venues which use subtitling (university areas, town centres, etc.), then exhibitors will ask for a dubbed version. This is the approach taken by the US majors. For example, of the 900 copies of the *Harry Potter* film released in France in 2006, 850 were dubbed and 50 were subtitled.

- **Film genre**: Children’s films are generally dubbed, even in countries with a subtitling tradition. With documentaries, voice-overs are frequently used. In traditional dubbing countries, art house films as well as genre films (for example, horror films) are generally subtitled. This decision is generally just a question of economic reasoning: given the potential number of viewers for films of this type, dubbing is not worth the investment.

- **Film budget**: in some dubbing countries such as Germany, Austria and France, small budget films will be subtitled rather than dubbed; once again, for economic reasons. In these countries, sector professionals will use the subtitled internegative version to make copies, rather than copy-by-copy burning which is more expensive. Using this internegative, the laboratory can reproduce a higher number of copies for the distributor.

- **Changes in general public preferences**: in traditional dubbing countries such as Germany, France, Hungary and the Czech Republic, more and more people, especially in major urban centres, are keen on a subtitled version.

- **Possibility to sell the film to a TV channel**: In France, as well as Germany, TV channels will want the dubbed version. This means that a film released with subtitles in cinemas can be later dubbed, in order to trigger a sale to the channels.

Sometimes, distributors will distribute films in both forms (i.e., dubbed copies as well as subtitled copies). In this case, the idea is to reach different viewer segments (especially in larger cities). This is a common practice in Germany. German distributors informed us that they prepare a small number of subtitled copies for practically every dubbed film. This is

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40 Sometimes, children’s films are distributed both in dubbed and subtitled version. This is the case in Denmark, Portugal and Romania (see annex V).
because in Germany (as in Austria), there are a certain number of art-house specialist venues which want the subtitled versions.

In France, on the contrary, films originally released in a subtitled version, might be re-released dubbed due to unexpected success. In doing this, the distributors hope to reach out to people outside the major urban centres. In Greece, animation films can be released in both versions: a dubbed version intended for children, and a subtitled version intended for adults. This was the case, for example, with films such as *Shrek*, *The incredibles* and *Ice Age II*. In this case, the purpose is more “social” than economic, the idea being to reach out to different viewer segments.

The above begets a question: should all types of films be released in both dubbed and subtitled versions? The answer would seem to be in the negative for Arthouse films where there is no real demand for dubbed copies.

However, it was not possible to obtain further information in this respect (as regards, for example, the number of copies to prepare); distributors informed us that they based their decisions quite simply on “gut feeling”.

In Germany, dubbed versions continue to bring in more viewers. A film clearly earmarked “Art-house” such as the Czech film *Something like happiness*, released in 2005 on 43 copies (2 subtitled and 41 dubbed), generated more ticket office revenue via the dubbed version. When *Broken Flowers* was released, the director Jim Jarmusch wanted 30% of film copies to be subtitled. Once the film had been distributed, it was noted that the dubbed versions were much more successful than the subtitled ones. However, one should not make any rash assumptions here since the success of the dubbed version could well have been caused by Bill Murray’s presence in the film, catapulted into the general public spotlight after the success of *Lost in translation*.

In France, the case of Lars von Trier’s films highlights a different situation. After the success of *Breaking the Waves* and *Dancer in the Dark*, the distributor (Les films du Losange) released *Dogville* both dubbed and subtitled. And such was the success of the subtitled version (rather than the dubbed version) that the distributor decided to release *Manderlay*, Lars von Trier’s following film, almost exclusively in subtitled version. Likewise, the dubbed version of Woody Allen’s *Scoop* released by TFM Distribution was not successful whereas the subtitled version was.

In Hungary, examples of distribution in both versions are rare, and distributors can only afford to go down this route in the case of major films, and even then, the vast majority of copies will be dubbed. Recent examples include *Die Hard 4* with 34 dubbed copies and just a single subtitled copy. In Hungry, the financial risk of dubbing a film can only be taken if it is expected that the film will generate significant box office takings.

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41 For example, *The Lives of Others* by Florian Henckel von Donnersmarck, still showing in Paris cinemas after six months. Initially, only a subtitled version was released. But, given the success of the film, a dubbed version was also released in order to target cinemagoers in smaller urban areas. According to distributors however, dubbing a work does not always generate enough extra custom (small number of copies for a small number of cinemas) to make it worthwhile.

42 *Shrek I* by Andrew Adamson and Vicky Jenson, USA 2001, OV in English; *Shrek II* by Andrew Adamson and Kelly Asbury, USA 2004, OV in English; *The incredibles* (*The Fantastics*) by Brad Bird, USA 2004, OV in English; *Ice Age II - The Meltdown* by Carlos Saldanha, USA 2006, OV in English.

43 *Stesti* (*Something like happiness*) by Bohdan Sláma, Czech Republic 2005, OV in Czech.

44 Caused certainly by the greater number of dubbed copies (with respect to subtitled copies) but also by viewer preferences for dubbing.

45 *Broken Flowers* by Jim Jarmusch, USA/France 2005, OV in English.

46 *Lost in translation* by Sofia Coppola, USA/Japan 2003, OV in English.

47 *Manderlay* by Lars von Trier, Denmark 2005, OV in English.

48 *Scoop* by Woody Allen, UK/USA 2006, OV in English.

49 *Die Hard 4* by Len Wiseman, UK/USA 2007, OV in English.
Double version and double advertising campaigns

In the case of a release in double version, the distributor does not always need to organize two different advertising campaigns. In Germany for example, distributors will generally advertise just the dubbed version, leaving exhibitors the task of advertising their subtitled copies locally. As regards animation films released in both versions however, a more significant advertising investment is sometimes required (see section on animation films released in Greece, discussed above). In France, opinions diverged: some considered that a double release (i.e. dubbed and subtitled) does not necessitate a double advertising campaign, while others opined that releasing a double version is more complicated, since the original subtitled version and the French dubbed version aim at different viewer segments. In Austria, distributors liaise with multiplex exhibitors to advertise dubbed films, as well as with art-house exhibitors for subtitled versions.

Impact of language-transfer costs on advertising budgets

The portion represented by language-transfer costs (dubbing or subtitling) in distributors advertising budgets varies significantly.

In subtitling countries, the budget share allocated to language transfer represents between 5% to 30% of the total budget. Romania is an exception however, where the portion can rise up to 70%. Several factors explain this: the quasi-monopoly practiced by a major subtitling laboratory in the country, but also the specific profile of the Romanian cinema industry, which has only 55 cinemas, and where box office returns are still relatively low.

In France, the subtitling/dubbing budget represents between 10% to 20% of the total budget.

In Austria it varies between 30 to 70%.

Generally speaking, it was noted that the cost of dubbing or subtitling a film (depending on the tradition in each country) does not constitute an obstacle to the purchasing of the work, with the exception of dubbing costs for children's films in subtitling countries. In Denmark for example, dubbing costs account for 25% of the total distribution budget of a film and, given the relative smallness of the market, this cost naturally exerts downward pressure on profitability (and thus the purchase) of small animation films. In this specific case, the financial help of the MEDIA program is considered essential.

Distributors

In some countries however, there is no real decision to make since the dubbing or subtitling tradition is so much a part of the landscape that the language transfer always takes place in the same way. In other countries, however, distributors do have a genuine choice.

In this case, they will base their decision on the following criteria:
- Commercial potential of the film;
- Film genre;
- Film budget;
- Changes in general public preferences;
- Possibility to sell the film to a TV channel.

50 In France, the cost of the subtitling of the first copy is on average 7500 €uro. The average cost of dubbing a film is 45,000 €uro.

51 Denmark is one of the most expensive dubbing countries in Europe. The average cost of dubbing is 52,000 €uro (average for the Nordic countries group: see Part B "Analysis of Market Supply" above).
Sometimes, distributors will release the film in double version (i.e., dubbed and subtitled) in order to reach different viewer segments. It was not possible to obtain in-depth information regarding the “success”, measured in terms of box office takings, for such releases.

The portion of the overall distributors advertising budgets which have to be spent on language transfers (dubbing or subtitling) varies a great deal between countries. Generally speaking, the cost of dubbing or subtitling a film (depending on the tradition in each country) does not constitute an obstacle to purchasing the work, with the exception of dubbing costs for children's films in subtitling countries.

**Exhibitors**

The practices of European exhibitors are impacted by the specific cultural practices of each country. Questions related to general public habits and different genres have already been discussed in the section on Distribution in this part of the report, which is recommended for a general overview.

From an exhibitor’s point of view, linguistic diversity is only an obstacle to the circulation of works in small countries. Moreover, a body such as Europa Cinemas', a federation of 480 European cinemas, as well as the International Confederation of Art Cinemas (CICAE - about 3000 screens) shares this opinion. The CICAE emphasizes the extreme difficulties experienced by exhibitors in some countries (Baltic countries and Bulgaria, for example) to show non-American films. In this case, program diversity is catered to by events such as festivals and retrospectives, with films provided by the Embassies in the country, or other promotional body such as UniFrance or German Films.

An interesting opportunity to federate costs might be to create a database listing the availability of all subtitled films. At the moment, notably in France, some industrial electronic subtitling companies are creating a database featuring all copies subtitled electronically. With this initiative, interested parties can obtain a subtitled copy from a laboratory at a price far below that of a new subtitling. This practice is used especially for festivals, where savings of up to 30% can be made by using the subtitles file already created. At the same time, in order to respect authors rights, the first festival (i.e., the festival which owns the subtitles) get a discount of 35%, thereby enabling it to reduce costs.

The exhibitors who participated in the study also underlined the importance of having an appropriate marketing strategy for European works, since original versions can constitute an obstacle for general public screening, especially in countries with a dubbing tradition.
Exhibitors

The language versions of films distributed in cinemas are strongly impacted by the cultural practices of each country. From an exhibitor’s point of view, linguistic diversity is only an obstacle to the circulation of works in small countries. Sometimes, it is practically impossible for operators in these countries to screen non-American films, in which case program diversity is catered to by events such as festivals and retrospectives.

An estimation of the demand for dubbing/subtitling services in the cinema market

In order to access the potential demand for dubbing and subtitling services, a quantitative estimation of the demand coming from cinema distributors was undertaken. Note that this concerns initial releases.

Comments regarding methodology

Distributor requirements for dubbing/subtitling were estimated on the basis of the number of non-national European films in circulation in each European country. The information used was provided by the European Audiovisual Observatory for 2005 (the only year for which such statistics are currently available).

Data for following countries are not available: Cyprus, Ireland, Liechtenstein, Luxembourg, Malta, Slovenia.

Linguistic areas

On the basis of currently available data, it was not possible to identify, from the total number of non-European films in circulation in each country, the number of films coming from a country within the same linguistic area) (thus, already dubbed/subtitled). Therefore, the estimates of the number of films given below should be considered as a maximum estimation.

<table>
<thead>
<tr>
<th>Country</th>
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</thead>
<tbody>
<tr>
<td>AT</td>
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<tr>
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</tr>
<tr>
<td>ES</td>
<td>181</td>
</tr>
<tr>
<td>FI</td>
<td>58</td>
</tr>
</tbody>
</table>
An analysis of the above table

The total number of non-national European films circulating in Europe 31 was 2172, which represents about 3793 hours (realistic assumption of 90 minutes per film on average). This hourly total can be broken into 750 hours for dubbing countries (the four majors: Germany, Spain, France, Italy) and 3043 hours for subtitling countries.
The broadcasting market

Broadcasters

Dubbing, subtitling, or voice-over? The decision as to which language-transfer technique should be used is taken by European broadcasters on the basis of the general practices in their country. As with cinema screening, documentaries and children's programs are the two genres which can diverge from the general practices in each country: generally speaking, children's programs are dubbed even in countries where the other programs are subtitled\(^{52}\), and generally speaking, voice-over is the preferred solution for documentaries.

Voice-over

Voice-over, a technique not used in cinemas, consists in reducing the sound level of the language on the original work, and superposing another language. Note however, that even though the sound is reduced, the original language will remain nevertheless audible even if very low. This technique is preferred in television programming in countries such as Bulgaria, Latvia, Lithuania, Poland, and to a lesser extent, Estonia (66% of foreign programs are subtitled; 33% have voice-over). It is worth noting that voice-over such as this technique is practiced in Bulgaria is in reality a type of semi-dubbing, since between 5 to 7 different voices are used.

Notwithstanding the preceding, voice-over is frequently implemented using just a single voice (or, at most, 2 voices, male and female) even in the case of mainstream broadcasters in the major countries.

In-house/out of house? A question of quality

Generally speaking, most broadcasters interact with dubbing/subtitling companies via a specific in-house language-transfer service. In spite of the diversity of situations observed, the following broad comments are valid:

- There are very few broadcasters handling the entire language-transfer process in-house. And when such situations do exist, they are exceptions to the rule: in the case of the Bulgarian public TV channel BNT, the in-house tradition is a long-standing one, enabling the channel to exert total control over the quality of the translations and, apparently, keep costs under control, while running a service with about 30 people. In the case of the public operator NPS in the Netherlands, all language-transfer work is handled by a special internal service, which provides material for 3 public channels. This department, with about 80 permanent staff, provides quality, accurate translations aimed at a public with a high degree of appreciation for good-quality subtitling work.

- Most broadcasters call on the services of external companies to meet their language-transfer requirements. The degree of quality control and monitoring of the subcontracted subtitling/dubbing work can vary, and depends, especially in the case of public channels, on whether or not a special unit has been set up to monitor work done.

  - The decision to set up a special in-house service will be based on economic and technical considerations (the necessity to respect the technical

\(^{52}\) In Estonia, children's programs are broadcast using voice-over rather than dubbed. In Denmark, even some children's films are broadcast in subtitled version.
specifications of each TV channel). Being able to count on good-quality work is also an essential consideration, especially for public television channels. In countries such as Slovenia and Estonia, the desire to have a top level translation in the national language plays a determining role. In the United Kingdom, a long-standing tradition of producing top-notch work has led to the BBC re-subtitling foreign programs even if a subtitled version already exists. Moreover, the BBC Purchases department will check the quality of the translated work for technical compatibility. Likewise, in Germany, ZDF has created a specialized subsidiary (ZDF Enterprises), reporting to the Programming department, whose only task is to monitor the quality of dubbing work done by external studios. The same can be said for ARTE, with however a dispatching of roles for each antenna: ARTE Paris checks the quality of fiction dubbing, and inter-linguistic subtitling in French, whilst the Strasburg antenna has a major multilingual unit specialized in the translation into the second broadcasting language as well as the language transfer of flow programs, trailers, and visual elements (inserts, etc.).

TV5, the French-speaking public station channel is a case apart in that the works that are broadcast over all networks are in French, subtitled into a language understood in the country of reception. The phonorecord library service, based in the headquarters of the station, monitors the quality and nature of the subtitling done by external companies, assessed in the light of TV5’s specific mission, namely, facilitate learning of the French language.

- Even broadcasters which do not have a specific unit in charge of language transfer will carry out checks on the dubbing/subtitling work returned by external studios. These checks will however be carried out in a decentralized manner, either by the Programming department (with executive producers in charge of “their” programs) or by the Purchases departments.

- Economic and technical criteria impact significantly on the choice of external company, even though flexibility is also an important consideration. Some channels informed us that they get all their work done with the same external companies, familiar with the broadcaster’s technical specifications, whilst others prefer to work with several companies in turn. In the case of works where the language element is particularly important, the channels prefer to work with an external company based in the country since, even though they may be more expensive, the station wants the right dubbing accents (case with, for example, Télévision Suisse Romande) or subtitled expressions (in Flanders, for example).

- It is also of note that this delicate question of quality is often a source of conflict between broadcasters and external companies. And “retakes” demanded by broadcasters to improve the quality are often interpreted as an indirect way of delaying payment for services rendered by out-of-house companies, especially when such demands take place several weeks after the work was initially delivered.

53 Each national pole supplies ARTE Strasbourg with programs in both the national version and the original version, and ARTE Strasbourg takes care of the language transfer (French to German and German to French).
Multilingual versions and program grids

Some TV channels provide some of their programs in multilingual version, giving viewers a choice between the original version subtitled and the dubbed version. This is a common feature with satellites and cable channels, for example. This possibility is now available with digital cable television in Europe, assuming that the television station channel procures pre-existing language versions. Viewers can then check, via their remote control, if the program has been subtitled in their language, and can select the version they want. For example, Euronews has been providing (for several years already) their content in four different languages. Note that the viewer must have the necessary reception technology.

The Skycap Italia and CanalSat France cinema channels provide subtitled content. Likewise, Télévision Suisse Romande uses dual-channel technology to provide multilingual broadcasting, and some ARTE programs give viewers a choice between the dubbed version and the subtitled original version. To simplify, digital technology may well usher in new developments in this domain characterized by a wider selection of linguistic choices.

In a country such as Finland, with two official languages (Finnish, Swedish), the public television TV station channel YLE addresses the language question in quite a specific manner: about 50% of YLE’s programs consists of foreign language programs subtitled in Finnish. Only programs for young children are dubbed\(^{54}\). The YLE Import service handles most of the subtitling of foreign programs, and dubbing is subcontracted out to external companies.

YLE’s bylaws oblige the station channel to cater to the requirements of national minorities. And so, on Monday and Tuesday evenings, YLE 1 and YLE 2 broadcast in Swedish with Finnish subtitles under the label FST (Finlands Svenska Television) which is actually a separate department within the channel. This will however change with the transition to completely digital transmission counting from September 2007. Following this date, YLE 1 and YLE 2 will no longer broadcast in Swedish, and viewers looking for Swedish programs can go to the FST5 Digital Terrestrial Television TV channel, which will be 100% Swedish.

YLE has set up a department to handle the production of Swedish language programs broadcast on FST. About 80% of these programs are subtitled in Finnish by the YLE Import service, in the same way as foreign programs. The exact extent to which FST5 programs will be subtitled in Finnish from September 2007 has not yet been decided. FST also provides foreign-language programs with Swedish subtitling. Finish-language subtitling is also available for these programs via teletext.

No program is subtitled in sami and such programs on YLE consist only in a 10-minute news bulletin (TV-uddasat), broadcast once a day from Monday to Friday in the Lapland region to the north of Rovaniemi. This news bulletin is created in Karasjoki in Norway, and is also broadcast in the Lapland areas of Norway and Sweden. It is not subtitled in Finnish.

The question of linguistic minorities is also salient in Spain, even if Spanish is the only official language. Euskal Telebista, a Basque group, broadcasts two channels via satellite, one in Spanish and one in Basque. Foreign-language programs are dubbed, in Spanish for one

\(^{54}\) Programmers consider that children can shift from dubbing to subtitling between the ages of 7 to 10.
channel, and in Basque for the other. Since, even in the Basque country, only 20% of the population actually speak Basque, the programmers have to choose carefully: whilst children’s programs or sports programs can be dubbed into Basque without this causing any problems, since these programs target a market segment who almost definitely speak Basque, more complex films are dubbed in Spanish for the Spanish channel, to make sure that all people in the region can understand.

In Flemish-speaking Belgium, foreign programs are always subtitled, except those for children. A recent development consists in subtitling Flemish programs more and more, to take account of the wide variety of dialects spoken. On a similar note, subtitles in touch of programs originating in the Netherlands must also be verified because Belgian viewers have sometimes reported difficulties in understanding some words and expressions. Thus it would seem that a decision has been made to accept linguistic diversity, even focusing on this diversity once it is considered the dialects are preventing comprehension, thus warranting subtitling.

In Baltic countries, Russian is very widely spoken. Thus, TV channels broadcast some programs in Russian. On a related note, the Estonian public television operator plans to launch a second channel in 2008 with a much higher portion of programs either subtitled in Russian or with Russian voice-over.

**Television broadcasters**

The language-transfer decision made by broadcasters is based on two closely linked criteria: viewer preferences (generally already established for many years) and the broadcaster’s editorial choices. If there is a real choice as regards the language-transfer decision, the broadcaster will arbitrate between the specific features of the work and viewer preferences, bearing in mind that in dubbing countries, broadcasting a work with subtitles can lead to an audience drop of about 30%.

Regarding program genres, regardless of the broadcaster’s general practices, children's programs are generally dubbed (with the threshold age going from 8 to 12 years) as are documentaries (where voice-over is also a common solution). As regards the program grid, and assuming that the broadcaster can actually choose, access primetime and primetime slots will be generally dubbed (or with voice-over) in order to take viewers’ somewhat drifting attention at that time into account.

The language-transfer of works is generally entrusted to external companies, with the returned work checked by broadcasters both for quality and compliancy with the technical specifications of each station.

Some stations broadcast some of the programs in multilingual version, in which case the viewers can choose between an original subtitled version, and the dubbed version. This approach is used by satellite and cable channels, for example. Multilingual versions are especially common in countries with well-established language minorities.
An estimation of the demand for language-transfer services in the broadcasting market

In order to estimate the potential demand for dubbing/subtitling services in the broadcasting market, a quantitative estimation of TV channels demands in this field was undertaken. The demand refers to all audiovisual works (films, TV fictions, animation films, documentaries).

Remarks on the study methodology

The following table was created using European Audiovisual Observatory data for the year 2005, and corresponds to an overall estimation of the number of hours of fiction works (films, television films, television series, sitcoms, short films, animation films) broadcast on television in Europe.

A number of comments should be made regarding the methodology used before making any analysis or reaching any conclusions.

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<td>573 246</td>
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<td>161 137</td>
<td>196 297</td>
<td>75 825</td>
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</table>

Source: MCG according to OEA 2006

B  Number of hours of fiction NNE (Feature Films/telefilms/series & soap operas/CM/animation)
C  Number of hours of national fiction (Feature Films/telefilms/séries et feuilletons/CM/animation)
D  Number of non-European hours (USA/CAN/AUST/others)
G  Numbers of hours of National feature films
H  Numbers of hours of NNE feature films
I  Numbers of hours of NON EU (USA/CAN/AUST/AUS/Can/Other) Films
J  TOTAL
K  Of which animation

55 European Audiovisual Observatory - Directory 2006.
A representative sample?

The above table is a collection of declared data (Europe 13\textsuperscript{56}) and estimations for 7 other countries\textsuperscript{57}. For some countries however, no information at all was available, whilst in other case, the information is partial (not all channels replied) or approximate (no information regarding national production, for example). In total, 156 channels in 29 countries replied to the request for information. This has to be extrapolated to the 549 channels and publishing groups in the MCG database, prepared for the study. It should be remembered that the database inventories all broadcasters who could broadcast works of fiction and therefore excludes specialist broadcasting channels (news, games, sports, teleshopping, etc.).

New productions and re-broadcasts

On a further cautionary note, it should be pointed out that the above table does not make any distinction between the broadcasting of new works (never previously broadcast) and re-broadcasts. Given the relative similarity between program grids of broadcasters from one season to another, it seems reasonable to assume that the ratio between the volume of hours re-broadcast (i.e., already dubbed and/or subtitled) and the volume of new hours does not vary very much from year to year. What was dubbed or subtitled during the year n-1 will be part of the re-broadcasts of year n, and the new hours dubbed for broadcasting during year n (new purchases, new productions,) will represent the year n dubbing market (or subtitling market), but will be part of the re-broadcasts of year n+1).

Linguistic areas

Linguistic areas must be taken into account (France, French-speaking Belgium, French-speaking Switzerland; Germany + Austria; Italy + Italian-speaking Switzerland) where non-national works originating in a country within the same linguistic area do not need to be dubbed/subtitled. However, not enough information was available to calculate this phenomenon.

Number of language versions per work

We considered that works are dubbed or subtitled just once (notwithstanding exceptions). Thus, whenever a film is purchased by a distributor for the local market, the national language version will generally be used both for cinema release and for the TV channels, as well as DVDs and VoD. However, in some cases, films can be re-subtitled (or re-dubbed) when changing from one medium to another, especially when the monitor of the medium is not compatible with the cinema subtitling or dubbing technical characteristics (number of characters per line, for example).

Re-broadcasts

For the purpose of the study, it was assumed that works are re-broadcast on average 7 times a year on cable and satellite channels which are not initial-release channels. And indeed, program vendors confirmed that in general, they sell 3 multi-broadcasts to cable and satellite channels (whereby one multi-broadcast generally represents 7 re-broadcasts in the course of

\textsuperscript{56} Austria, Flemish-speaking Belgium, French-speaking Belgium, Germany, Denmark, Finland, France, the United Kingdom, Ireland, Italy, the Netherlands, Norway, Sweden.
\textsuperscript{57} Switzerland, Czech Republic, Spain, Greece, Hungary, Poland, Portugal. No information was available for the following countries: Bulgaria, Cyprus, Estonia, Iceland, Liechtenstein, Lithuania, Latvia, Luxembourg, Malta, Romania, Slovenia, Slovakia.
the week). Since rights-assignment contracts are generally for a duration of three years, the three multi-broadcasts are spread out over these three years. Therefore, the study took one single multi-broadcast per year as the working hypothesis. As regards mainstream, commercial or public channels, the assumed assignment was 3 to 4 broadcasts over 3 years, i.e. one rebroadcast per year.

Our analysis
The 573,248 hours broadcast by the surveyed channels can be broken down into 32.9% for dubbing countries, and 67.1% for subtitling countries.

Of this total number of hours broadcast yearly, non-European fictions represent 73% of the total, with 73.15% made up for by American programs (54% of the general total).

Non-European fictions represent 68.57% of hours in dubbing countries, compared with 79.55% in subtitling countries. This gives a good idea of the massive predominance of the English language since a clear majority (57%) of these works from English-speaking countries (USA, Australia, New Zealand and Canada).

Non-national European fictions represent 10.93% in dubbing countries compared with 16.97% in subtitling countries.

Lastly, if one considers program genre within the fiction category, cinema films represent 37.5% of volumes broadcast in dubbing countries compared to 16.97% for subtitling countries.

Animation represents 4.65% and 26.88% respectively.

To get the best idea possible of the actual European market, a distinction was made between fiction broadcast on cable/satellite channels and fiction broadcast on mainstream channels (represented in the table below):
The annual volume for the cable/satellite group represents 213,446 hours, with 101,992 hours in 2 dubbing countries: France and Germany (unable to get information regarding Italy) and 78,023 hours in subtitling countries.

The annual volume for mainstream channels corresponds to 359,802 hours, with 82,393 hours accounted for by the 4 major dubbing countries, and 273,160 hours for the subtitling countries group.

Lastly, the following assumptions were made when calculating the approximate number of hours of dubbing/subtitling in the European market:
• Of the European Audiovisual Observatory sample, the annual volume of the dubbing/subtitling market was 30,229 hours for cable and satellite, and 118,517 hours for mainstream channels.

• By cross-referencing practices and regions, the European annual dubbing market can be estimated to be 42,000 hours and the subtitling market to be 106,712 hours.

• This corresponds to about 20% of the annual volumes broadcast over the 19 countries.

If one assumes that these 156 channels broadcast 24/24, and 365 days a year, these 573,248 hours (excluding documentaries and television magazines) represent 41.6% of annual broadcasting. Therefore, extrapolating to the 596 channels of the 31 countries of the study yields the following approximate results: **408,320 hours of dubbed or subtitled content is broadcast each year** (especially subtitling since the dubbing country channels are well represented in the European Audiovisual Observatory sample, except for Italy and some of Germany).

In order to get an idea of the potential interest in introducing a European Union grant scheme to support the circulation of works outside their national frontiers, with particular emphasis on grants to support dubbing and subtitling, one must deduct non-European dubbed and/or subtitled works from the above. It was considered that this represents about 70% of the total amount. Therefore, the dubbing/subtitling volume, in terms of hours, potentially entitled to grant support is the remaining 30%, i.e., **122,500 hours** for Europe 31.

A more in-depth analysis would consist in distinguishing between films and television works, and between dubbing and subtitling. However, given the non-availability of some information, and the limits of the working assumptions, it was not possible to reach this level of detail.
The video publishing market

The research into the video/DVD publishing market revealed two distinct realities, one concerning the majors, and the other concerning the European independent publishers.

The approach favoured by the majors consists in publishing films in several languages, with each DVD containing, on average, 6 dubbed versions and 10 subtitled versions. Therefore, with three DVDs, the publishers can serve the entire European market.

This policy is specific to the majors, who can control all rights in all countries by means of their local subsidiaries.

The above contrasts strongly with European independent publishers who see no clear benefit in providing multilingual products. An internal study (to which the study did not have access) carried out by the France Télévisions Distribution marketing service shows that, on average, viewers watch the foreign language versions on their DVDs less than one time. Bonus content is watched on average one time in the language of the country (or in English). In other words, the potential rich functionalities of the DVD do not generate a desire to actually watch the product in other languages (except for English viewers). Only a few “collector” versions are capable of creating niche markets, where language is part of the marketing plan.

Given the above, it will come as no surprise to learn that independent publishers offer, on average, between one to three languages maximum. Dubbed versions are provided in countries where dubbing predominates. As regards Scandinavian countries, the study carried out amongst video publishers shows that adults prefer to watch films in their subtitled versions, and that only children's films are dubbed.

In Finland, several distribution companies have distribution rights for the Finnish and Swedish markets, and produce a single version of the DVD, containing both Finnish and Swedish subtitles. For example, Nordisk Film has centralized the translation of films which it distributes for all countries where it operates (Denmark, Estonia, Finland, Latvia, Norway and Sweden). Moreover, the Finnish Film Foundation obligates companies to subtitle, into Finnish and Swedish, their catalogue of foreign films intended for DVD distribution. The Foundation awards grants to fund this operation.

In Hungary, the differences between content published on DVDs and cinema releases is striking. As regards the latter, distributors are moving more and more towards subtitling, whereas with DVD, dubbing is often combined with subtitling, failing which the product might fail commercially. Moreover, there are different tariffs for “cinema” dubbing and “video” dubbing, with the former 1.5 to 7 times more expensive. This difference clearly illustrates the far more exacting cinema standards in terms of voice casting, and the extra cost generated by using 5.1 Dolby Digital technology.

Value of the catalogue and linguistic diversity

Moreover, DVD publishers are not really interested in preserving the patrimonial value of a film by means of multilingualism, all the more so since providing a product in several

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58 According to some Hungarian professionals, the "cinema" dubbing tariff is 30 € per minute, whereas the "DVD" dubbing tariff is 23 € per minute.
languages can generate problems as regards the territorial scope of rights. This problem also exists for Video-on-Demand platforms, with rights owners insisting that the contents of a platform not be available outside the country of that platform (geo-localization). This is a significant problem in the case of Central and Eastern Europe, where there are many examples of linguistic minorities along border areas. For example, a Hungarian publisher cannot provide content to Hungarian minorities in neighbouring countries such as Romania and the Ukraine.

As regards online film distribution, no real demand for original language versions was noticed (except for English in France).

In general, video publishers purchased dubbed and subtitled versions already available (from distributors and broadcasters). In the case where the video publishing rights are held by distributors, video publishers generally use the same subtitled/dubbed versions as for the cinema release. Sometimes, sales agents, preparing a DVD release, try to retrieve the language versions prepared by their customers after the rights have expired (15 years in general). It has to be said however, that the residual commercial potential of a film will be relatively low after such a long period, especially if the film has been frequently shown. Even though the distributors and publishers questioned maintained that the DVD release uses the same subtitled/dubbed version as the cinema release, some sector professionals believe that the quality of the DVD subtitling/dubbing is not as good.

And indeed, generally speaking, language-transfer work done exclusively for a DVD release is less expensive than for the cinema release. For example, a French video publisher gave the average cost of a dubbed DVD release as between 18,000€ to 20,000€, which is 50% less expensive than a dubbed cinema release.

*Equal access*

Subtitling for deaf and hard-of-hearing persons is available only for small percent of works published on DVDs/videos.

**DVD/Video publishers**

Fundamental difference between the *majors* and independent publishers:
- Majors: DVD published in several languages (6 dubbed versions, 10 subtitled versions on average).
- Independent publishers: 1 to 3 languages per DVD on average.

It is not easy to provide content in several languages due to issues of the territorial scope of rights.

Very few DVD/video works are subtitled to the intention of deaf and hard-of-hearing persons.
Festivals

In Europe, the question of language versions is addressed differently from festival to festival; however, it is safe to assert that all festivals surveyed share two aspects:

1. Practically all films, whose original version is not English, are screened with English subtitles. Generally speaking, the copies are compatible with the technology used to do the laser subtitling in English. Some festivals will only accept films with laser subtitling in English.

2. Most festivals will organize the translation of festival films into the official language of the country, at least for officially selected competing films.

The subtitling of films is generally accepted for festivals, even in those countries where dubbing is the most frequently used technique for cinema-screened films. This is because festivals are considered to be special occasions, where it is reasonable to expect viewers to make the “effort” to read subtitles.

Festivals and Linguistic diversity

The number of language versions subsequently made available by the festival depends significantly on national and local specific features. Sometimes, the local situation will entail the subtitling into a large number of languages (for example, Berlin Film Festival, and the Festroia in Portugal); sometimes, on the contrary, the English version alone suffices (for example the Copenhagen International Festival in Denmark, or the Uppsala International Short Film Festival in Sweden).

Electronic subtitling

Generally speaking, electronic subtitling is the preferred technique to support the film’s translation into the official language of the festival country. Some European companies have specialized in this service, and have developed “language kits” which are installed in the projection room, and project the additional language version (i.e. of the festival country) on the screen. Voice-over and simultaneous interpretation are not only less frequently encountered; they are also generally reserved for children’s films.

The subtitling budgets of festivals

Regardless of the technique used to support the translations of films (excluding laser subtitling), the costs are generally covered by the festival. The budget available for the electronic subtitling of a 90-minute film varies significantly between countries, ranging from a minimum value of 120€ in the Czech Republic to a maximum of 1800€ in France. In those countries where subtitling is most expensive, several professionals surveyed expressed the difficulty they experience in supporting this financial onus: in France (1,400 to 1,800€) some festivals try to share the costs of electronic subtitling, but this solution is sometimes

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59 For more information on European festival dubbing and subtitling practices, refer to study results in annex V.
60 This includes the costs of adaptation, synchronization, equipment rental and technical medium.
complicated to implement; in Germany (1000 to 1500€) festivals subtitle only competing films\textsuperscript{61}.

<table>
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<td>1. Practically all films, whose original version is not English, are screened with English subtitles. Generally speaking, the copies used are compatible with the technology used for the laser subtitling in English. Some festivals will only accept films with laser subtitling in English.</td>
</tr>
<tr>
<td>2. Most festivals will organize the translation of festival films into the official language of the country, at least for officially selected competing films.</td>
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<tr>
<td>The number of language versions subsequently made available by the festival depends significantly on national and local specific features. Generally speaking, electronic subtitling is the preferred technique to support the film translation into the official language of the festival country.</td>
</tr>
<tr>
<td>The budget available for the electronic subtitling of a 90-minute film varies significantly between countries, ranging from a minimum value of 120€ in the Czech Republic to a maximum of 1800€ in France.</td>
</tr>
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\textsuperscript{61} For detailed budgets per country, see Annex V - Festivals.
D – Practices according to media and genre of work

Generally divided into two major categories (dubbing countries versus subtitling countries, the study revealed that the actual situation on the ground is far more complex. For example, the language-transfer modes can vary, within the same country, according to the broadcast media (cinema, television, DVD) and the target viewers (general public, art-house public, children, hearing-impaired, deaf, visually-impaired and blind). Moreover, even though dubbing and subtitling do constitute the main techniques used to translate the original language of an audiovisual work, voice over is also well represented in some Eastern European countries and is highly appreciated by viewers, as was revealed in Poland when the public television TV station channel wanted to switch to dubbing, and for some types of works (for example, time-honoured tradition of voice-over with documentaries on television TV channels).

Moreover, in some countries where a language-transfer tradition is firmly in place for many years for historical reasons related to the economy, politics or culture of the country, new translation modes are emerging, sometimes obtaining market niches.

The European situation can also be explored on the basis of linguistic areas. If there are a number of countries speaking the same language, the practices of distributors and broadcasters in the smaller countries will depend on the purchasing policies of the leader country in that language region.

Some examples of linguistic areas:
- French-speaking countries: France (leader country), French-speaking Belgium, Luxembourg, French-speaking part of Switzerland.
- German-speaking countries: Germany (leader country), Austria, Liechtenstein and German-speaking part of Switzerland.
- English speaking countries: the United Kingdom (leader country), Ireland, Malta.
- Italian speaking countries: Italy (leader country), Italian speaking part of Switzerland.
- Greece (leader country) and Cyprus are also linked to each other.

Cinema distribution practices

As regards cinema-distribution practices, the two countries where dubbing really remains firmly rooted in the audiovisual landscape are Italy and Spain.

In Italy, most films released in cinemas during 2006 were screened only in the dubbed version. Very few cinemas screened a subtitled version. In fact, subtitling is limited practically exclusively to art-house cinemas and some city centre cinemas (often members of the Europa Cinemas network).

In Spain also, dubbing is by far the preferred screening choice, with only 2% to 5% of cinemas screening a subtitled original version. Nevertheless, the situation has changed over recent years, and according to data provided by the Instituto de Cinematografía y las Artes Audiovisuales (EFAD), the share of films screened only in original version with subtitles stands at 15%. Moreover, in large cities such as Madrid, Barcelona or Valencia, viewers can choose between the dubbed version and a subtitled version.

In addition, it would seem that Spanish viewers are beginning to consider subtitling in a new light, no longer reserved for a small “elite” of art-house film fans. Some viewers are
beginning to acknowledge the educational value of subtitles in learning foreign languages as well as the potential of subtitles to inject new life into regional languages such as Catalan and Basque, neglected under Franco.

In all other traditional dubbing countries, the practices of cinema distribution are beginning to change more rapidly and in a more striking fashion.

In **Germany**, the penetration rate of subtitling is higher. In many cases, distributors will release both a subtitled version and a dubbed version in order to satisfy the requirements of some viewers, especially in large cities, in particular in West Germany. In the case of small budget films, there will be a natural preference from the outset to opt for subtitling, since it is less expensive. Also, the increase in the number of small budget films in circulation has led to a significant increase in the number of subtitled works being screened in Germany.

In **Austria**, the practices are similar to those in Germany. Less than 10% of Austrian cinemas screen subtitled versions.

**France** is traditionally considered a dubbing country. However, practices have changed in recent years and now, practically all films distributed in France are available both in a subtitled version and in a dubbed version (even though the ratio of the former to the latter is between 10% to 90% and 20% to 80%). This proportion increases for American films, as opposed to European films, which is attributable to the target audience. More and more cinemas are screening mainstream films, and in particular European films, in the original version with subtitles.

**Hungary**, traditionally a dubbing country, has changed, and subtitling is now the preferred technique for cinema-screened works. Historically, well-known international actors had “their” Hungarian voice and the dubbing was so good that 25 years ago, when a film was released in the cinemas, there were actually two reviews, one for the film and one for dubbing. The leading theatre actors dubbed foreign actors. Now however, the situation has changed entirely, and most cinema releases are subtitled, with dubbing the preferred choice for television broadcasting.

Our study also indicated that the **Czech Republic** is in the process of switching from dubbing to subtitling for cinema releases. Even though viewers still prefer dubbing in the smaller urban regions, a gradual increase in the number of subtitled releases in the major urban areas can be noted.

It will be remembered that, in other countries listed above, dubbing remains the preferred language-transfer mode for television broadcasting.

As can be seen from the above country inventory, the European language-transfer situation as regards cinema screening is constantly evolving, and should not be considered static.

Moreover, so-called “subtitling countries” do not actually constitutes a uniform block. In some of these countries, bilingual subtitling is common. For example, this is the case in Belgium (French and Flemish), Finland (Finnish and Swedish), Luxembourg (French, Dutch and German) and Switzerland, for subtitled versions in the French-speaking part and German-speaking part of Switzerland (French and German). In fact, Switzerland is the case apart since, generally speaking, French and Italian-speaking Switzerland prefers dubbing, whereas
German-speaking Switzerland prefers subtitling. Moreover, some films are distributed in their original version, with broadcasting limited to a certain language region (French films in Romandie, German and Austrian films in the German-speaking part, and Italian films in Tessin.

**Television broadcasting practices**

As regards television broadcasting, dubbing predominates in 10 countries: Germany, Austria, Spain, France, Hungary, Italy, the Czech Republic, Slovakia, Switzerland, and French-speaking Belgium.

In Italy, public and private national TV channels broadcast foreign works only in the dubbed version, as do the Sky satellite channels (even if the subscriber can sometimes access the original version with subtitles).

In Spain, the vast majority of TV channels broadcast in Spanish, or in one of the regional languages.

Voice-over is practiced in 4 countries: Bulgaria, Poland, Latvia, and Lithuania. There is also some voice-over in Estonia (33% of programs broadcast with voice-over, and 66% subtitled).

Subtitling is practiced in 14 countries: Flemish-speaking Belgium, Cyprus, Denmark, Estonia, Finland, Greece, Ireland, Iceland, Norway, the Netherlands, Portugal, Romania, the United Kingdom, Slovenia, Sweden.

Particular reference should be made to two countries:

In Luxembourg, only RTL Letzeuberg sometimes broadcasts Luxembourg films or Luxembourg co-productions in their original version.

In Malta, works are broadcast in Maltese; foreign films are broadcast directly in English (or, in some cases, in Italian on Italian channels).

As regards television broadcasting, no major evolutions were perceived. Surveyed professionals noted that viewers remain strongly attached to the traditional forms of language transfer. In the words of one Slovakian broadcaster, “Slovaks speak Slovak and they want to hear their language spoken”, or “the television broadcasting situation remains unchanged” according to one Hungarian broadcaster. Even in countries such as Slovenia where more and more people are defending Slovenian, clearly stating their wish to see programs dubbed, broadcasting policies have not changed, since most viewers prefer subtitling.

<table>
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<tr>
<th>Conclusions regarding practices according to media</th>
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<tr>
<td>Generally divided into two major categories (dubbing countries versus subtitling countries), the study revealed that the actual situation on the ground is far more complex.</td>
</tr>
<tr>
<td>As regards cinema-distribution practices, Italy and Spain remain the two countries where dubbing is firmly rooted in the audiovisual landscape. In all other countries with a dubbing tradition, cinema-distribution practices are changing quicker and in a more striking manner.</td>
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Subtitling is practiced in 14 countries: Flemish speaking Belgium, Cyprus, Denmark, Estonia, Finland, Greece, Ireland, Iceland, Norway, the Netherlands, Portugal, Romania, the United Kingdom, Slovenia, Sweden.

Luxembourg and Malta are both special cases.

Practices according to the genre of the work

The preferred language-transfer practices are not impacted only according to the media used; the genre of the work also determines the choice made.

The best example is as regards *children's films*: practically all 31 countries in the study show children's films in the dubbed version, both in cinema and television. In order to enable preschool age children to have access to audiovisual works (at least those programs intended specifically for them), European distributors and broadcasters provide dubbed versions of non-national works.

*Documentaries* are a special case. Very often, non-national documentaries are screened with voice-over, or with a mixture of voice-over and subtitles (for example, dubbing or subtitling for narrator comments, and voice-over for comments made by filmed subjects, as is the case with the Canal Plus group in France). This practice saves money, and is frequently encountered both in the cinema-distribution circuit as well as in the audiovisual-broadcasting circuit in several European countries (for television, examples were noted in Belgium, Spain, France, Hungary, Italy, Norway, Slovakia). Other countries however prefer to use subtitles even with documentaries (such examples for television include Cyprus, Finland, Ireland, the Netherlands, Romania, Sweden).

In general, *television films* observe the same practices as *cinema films*.

Conclusions regarding practices according to the genre of works

The preferred language-transfer practices are not impacted only according to the media used; the genre of the work also determines the choice made.

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In general, *television films* observe the same practices as *cinema films*.
Map of language-transfer practices for cinema works screened in Europe
As can be seen above, the preferred choice for screening the film works in Europe is subtitling, even though dubbing countries do represent a significant portion of the total population, of audiovisual/cinema production, and of broadcasting volume. However, that in dubbing countries, there is currently a trend towards subtitling.
The preferred choice for screening television works in Europe is clearly dubbing. In addition to dubbing and some subtitling, voice-over plays an important role in 5 countries.
Part II. Problems relating to the circulation of works and to the competitiveness of the European audiovisual industry

E - Problems with the circulation of works and the competitiveness of the European audiovisual industry

The quality of audiovisual translation

The interviews conducted throughout this study suggest that, overall, the quality\(^{62}\) of linguistic transfer is quite varied from one country to another and from one medium or format to another. In general, the specialised companies note that subtitling is improving but that its quality varies according to format: cinema, television, or DVD. Some professionals say that there is difference in quality between Eastern Europe, where the quality seems to be improving, and Western Europe where the quality remains static.

As regards DVD distribution, the interviews reveal that the quality of subtitling is quite low. For example, the German dubbing/subtitling industries complain of the quality of DVD subtitling and explain that the German subtitles for this format were not done in Germany but in Austria, Switzerland or the Netherlands without any guarantee of quality. Also, the translations for multilingual versions of American DVDs are sometimes done in non-English speaking countries like India or the Philippines, which affects the linguistic quality of the final product. In fact, when supplying a product in a broad range of languages, the method is often to use English as the source (or pivot) language to be translated towards other languages, with all of the inevitable errors generated by “translations of translations”.

TV dubbing and subtitling professionals also criticise unsatisfactory levels of quality in certain TV channels, notably cable and satellite channels. In a context where the volume of programming hours to be translated is constantly growing and prices are falling (see later: “an unsolvable equation: volume/deadlines/prices), subtitling decisions are no longer taken by the linguistic transfer experts but by the channel’s financial managers. The quality control of translations, estimated at between 20 and 50% of total cost, is often the budget line item that is sacrificed in order to make savings. Furthermore, few subtitling companies are able to supply channels who broadcast in fifteen countries, while there are many who can deliver in 1 to 3 languages.

Cinema dubbing has a reputation for good quality, whereas dubbing for television is more mixed. The problem does not come from the dubbing technique itself (opting for lip synchronisation or not, voice casting, etc), but rather the quality of the translation. As in the case of subtitling, deadlines, budgets and work volume become obstacles to good quality work. Add to this the problem that translations are often done by non-professionals and without re-reading for quality control. As regards television, there is not yet a clear

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\(^{62}\) The notion of “quality” can be interpreted differently depending on the answers to several questions, such as: has the translation a purpose of replacement or supplement? Should dialogues be translated according to criteria of “orality” or of “acceptability”? These questions are the subject of examination in audiovisual translation. Here, “quality” translation means both the respect of the destination language (grammar, syntax, vocabulary, etc) as well as the other technical norms specific to the adaptation.
differentiation between channels that do good quality dubbing work and those that do not. In Germany, for example, the differences are marked from one programme to another. It is according to audience levels and the consequent potential advertising revenue that higher budgets for linguistic adaptation are made available. In Hungary, the quality of TV dubbing appears to be of a very inferior quality and the technical industries interviewed confirm that many viewers complain of this. Lithuania is a particular case because the translators work solely from an audio recording to avoid the risk of piracy (a distribution worry), which makes the translation task more difficult and contributes to lower quality.

Here are a number of questions regarding a growing phenomenon: “fansubbing” (“fan subtitling”), that is where fans themselves subtitle programmes (particularly TV series or Japanese animation) and circulate them in parallel to official distribution networks. Professionals have mixed opinions about the quality of these subtitling jobs. Some object to the fact that subtitling norms (for example, number of characters per line and number of lines per image) are not respected and that the quality of the translation is not guaranteed. On the other hand, some professionals note that the translation benefits from the knowledge that the “fansubbers” bring to the task of translating the programmes, because they know the “context and culture” of the series and may thus make a more sensitive adaptation.

Umberto Eco demonstrates in his recent work: “Experiences in translation”⁶³ that fidelity is not to “reproduce word by word but world by world”.

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**Conclusions on the question of quality in audiovisual translations**

Overall, the quality of linguistic transfers is quite varied, from one country to another and from one medium to another.

Generally speaking, specialised companies observe that subtitling is improving but that quality varies according to the medium, cinema, television, DVD.

Cinema dubbing has a reputation of good quality, while television dubbing standards are more varied. Problems of quality in translation are often the result of deadlines, budget and volume or due to the fact that they are often done by non-professionals and are not quality controlled through re-reading. Budget reductions also represent a threat to quality.

Professionals differ in their opinions regarding the quality of “fansubbing”.

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An unsolvable equation: volume/deadlines/prices

A three-parameter equation emerges from the research (volume, deadlines and price), an equation that seems not to have a solution.

**Volume**

The volumes in hours that need to be translated is enormous and will continue to grow as the number of channels increases in each country, notably due to the changeover to digital transmission. These new channels cannot, in the medium term, rely on the re-transmission of works that have already been seen many times. The hourly volume will also increase because of specific requirements to conform channels to national regulations relating to accessibility. This volume of hours parameter needs to be juxtaposed against the total dubbing and subtitling budgets available.

**Prices**

In some countries the prices paid to the technical industries haven’t changed, which in constant euro terms amounts to a budget decrease. Competition between the small channels coming onto the market, the temptation to delocalise, the tough competition between workers who come from outside the usual circuits add extra pressure to the budgets. Alongside the market leaders in dubbing and subtitling, who for the most part supply the American majors and the national TV channels, are emerging many little companies ready to respond to the demand of small and medium broadcasters who work on tight programming schedules and whose budgets for linguistic transfer are often quite limited. Dubbing and subtitling companies are economically vulnerable as is demonstrated by the number of company wind-ups due to financial difficulties as well as to mergers and acquisitions in dynamic marketplaces such as France, Italy, the United Kingdom, the Scandinavian countries and Belgium.

**Delivery deadlines**

The final parameter or variable to be considered in the equation is the delivery deadline. Companies in the sector note a marked tendency to shorten delivery deadlines for services ordered by their clients. For a good quality dubbing (with voice casting) this is not an issue, but for a good number of other services the delays are shorter to the detriment of the translation or adaptation (and its impact on the quality of the text) or the number of days paid to the dubbing actors. These professionals note, that everywhere in Europe (which is no accident considering the absence of representative structures in Europe, or indeed professional organisations in some countries), there is a deterioration in their work and remuneration conditions.

This deterioration is also observed by translators and adapters, who also have growing competition from adapters that normally work in literary translation, as well as from language graduates and from automatic translation software.

These three parameters provide us with an equation that is difficult to resolve especially given the absence of productivity gains in the dubbing and subtitling process combined with a tight financial situation for service companies, which are often familial in size, do not have capital reserves and are often at the mercy of to payment delays that are quite long.

Conclusions for an unsolvable equation

A three parameter equation seems to emerge from the research (volume, deadlines, price), an equation that does not have a solution.
The *volume in hours* to be translated is increasingly high and this number will continue to grow because the number of channels broadcasting is growing in every country, particularly in the context of the changeover to digital.

In certain countries *prices* are not changing. Competition from small channels new to the market, the temptation to delocalise, the unregulated competition of workers from outside the usual circuits, all of these contribute to the downward pressure on budgets.

The final parameter to be considered in this panorama is the work *deadline*, or the time allocated to do the job. Companies in the sector note a shortening of deadlines proposed by clients.

These three parameters provide an equation that is difficult to resolve especially with the lack of productivity gains in the process of dubbing and subtitling and a tough financial climate for small companies that don’t have capital reserves and are often obliged to wait a long time for payment.
Training: a real question?

Training is central to any discussion about dubbing or subtitling. Most professionals questioned, coming from distribution, TV broadcasting, the technical industries or even universities specialising in audiovisual translation, all underline that one of the major challenges to the evolution of the sector is the quality of the adaptations and the linguistic transfer overall (dubbing quality, for example).

However, the solutions proposed in response to this need don’t always suggest a need for more training. Two opposing positions exist in this debate: on the one hand, the professionals declare that the number of training courses available for audiovisual translation are sufficient and even surplus to market needs; on the other hand, professionals complain of the lack of specific training for dubbing actors (in Germany or Luxembourg, for example) or for audiovisual translators (in Austria, Italy, Ireland and Poland, for example).

This apparent contradiction can be explained on one hand by the diversity of the markets in the countries examined (markets having different levels of specialisation and therefore different training needs) and, on the other hand, by the training methods themselves for these professions. In fact, the training in dubbing and subtitling is done principally “in-house”. The adapters are professionals who know several languages and have learned the craft of adaptation, or they are professional translators or interpreters who have university training. The dubbing voices are most often professionals who have trained as actors and who also learn the techniques of dubbing on the job. Subtitling companies often organise short training courses for their new collaborators.

Specific training for these jobs seems quite recent and can be traced to the linguistic disciplines, which are taught in specialised institutes or in universities as an option alongside language training. According to several dubbing/subtitling companies, the courses offered by the universities do not have a particular relevance to the professional world. Some quality control would seem to be necessary to ensure a more efficient connection between the training institutes and the professional milieu.

Furthermore, professionals notice increasingly strong competition in audiovisual translation from young language studies graduates who enter the profession thanks to their linguistic skills and their knowledge of translation and subtitling software, but who are also responsible for the poor quality of a number of adaptations in circulation. In the book already referred to, Umberto Eco demonstrates, with a translation into Spanish of a paragraph from Genesis in the English King James bible, that while the translation software may be rich in lexical correlations, they are somewhat limited when it comes to contextualisation.

In order to better understand the challenges highlighted by the professionals, a summarised panorama of training practices in dubbing and subtitling for a sample of European countries in given below. For initial training, the principal sources are universities and higher training

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64 See above “The quality of audiovisual translation”.
65 For example, the software used doesn’t realise that the word “spirit” has a different meaning depending on whether it’s used in a church or a bar. See Umberto Eco, Experiences in translation, cit, p.32.
66 For more detailed country by country information, see appendix, IV.
institutes. For further and advanced training, the dubbing and subtitling technical industries were consulted.

Research into subtitling and dubbing in audiovisual translation is increasing in certain countries. It’s an area being studied by the translation and interpretation departments of a number of European universities whose researchers are often associated with academic organisations such as ESIST “European Association for Studies in Screen Translations”. These departments offer courses in “screen” or “audiovisual” translation leading to a Masters degree in professional training. Most of these courses are options taken alongside a specific language programme or are offered as part of a European Summer studies programme. The countries where such initial studies in audiovisual translation have most developed are: Germany, Belgium, Spain, France, Italy, Netherlands, Portugal and the United Kingdom. A presentation of the courses offered in these countries can be found below. More detailed information can be found in the appendices to this Report.

Professional associations exist at national level in different countries (“Danish Union of Journalists”, the Dutch “Vereniging van Schrijvers en Vertalers”, the Polish association “STAW”, the Canadian “The Open and Closed Project”, etc.) whose members are literary or audiovisual translators and whose objective is to combat the lowering of standards apparent with the emergence of the many new dubbing and subtitling companies that practice price cutting. The French “Association des Traducteurs Littéraires de France” offers training courses to maintain standards.

**Germany**

Film and TV schools in Germany do not give training in dubbing and subtitling. In 1996, the government created “Mediengestalter Bild und Ton”, training institutes managed by the TV channels that offer either initial or advanced professional training that could lead to employment in the channel itself or in the industry. However it is difficult to identify within these structures the courses that specifically concern subtitling and dubbing. Mme Gerzymisch-Arbogast of the University of Saarland’s “Advanced Translation Research Centre” is one of the most renowned European University researchers in the field.

**Belgium**

Courses are offered by two Flemish universities and by the Higher Institute in Brussels. Antwerp participates in the Summer school set up by the University of Bologna. Mme Corinne Imhauser of ISTI is one of the teachers/researchers who took part in the international conference on audiovisual translation entitled “In so many words”, which was organised by the universities of Surrey and Roehampton in 2004.

**Spain**

The December 2003 Spanish law n° 51/2003 on equal opportunity, non-discrimination and universal access for handicapped people, followed by the 1865/2004 decree creating a national council on the handicapped also had an impact on the profession and on research. Public and private communication media as well as commercial digital products (DVD, multimedia products, interactive games, etc…) have significantly increased the number of subtitled programmes for the hearing-impaired and those containing audio-description for the visually-impaired. This new dimension is a recent addition to course content for professional audiovisual translation studies. It is the universities in particular that apply themselves to creating a serious curriculum that includes theory, history, norms and techniques for dubbing and subtitling in their cinema and
television course as well as including the aspects relating to the hearing- and visually-impaired. The department of the Universitat Autonoma de Barcelona managed by Mme Pilar Horero is widely recognised at European level. Optional courses also exist in the “Languages, Translation and Interpreting” departments of the universities of Madrid, Tarragona, Vitoria, Malaga, Valladolid, Alicante, Salamanca.

Private institutes offer training courses that concentrate especially on dubbing and voice training. These “escuelas de doblaje” have links either with audio or dubbing studios or with actors/dubbers whose voices are known to the public. Their training involves several hours per week.

**France**
The universities of Paris X, Lille 3, Nice, Strasbourg and Toulouse offer training in dubbing and subtitling, as do a number of training institutes in Paris and Toulouse.

French universities are listed in the Training section of the ATLF (l'Association des Traducteurs Littéraires de France www.atlf.org.formation)

**Italy**
The University of Bologna seems the most active in linguistic and translation research in Italy. It set up its “European Summer School on Screen Translation” at which it brings together researchers and teachers from Roehampton University in London, Oviedo University in Spain, the Hoger Instituut voor Vertalers in Tolken Antwerp and the ATCR from the Universität of Saarlandes.

The University of Bologna as well as the universities of Pavia and Trieste also took part in the “On audiovisual translation” conference organised by the universities of Surrey and Roehampton in 2004.

**The Netherlands**
‘In-house’ training is widely used by both service providers and TV channels. There is a specific television course in subtitling and also specific courses in dubbing, audio description, and re-speaking.

**Portugal**
L’Instituto Politecnico de Leira takes part in the “European Summer School in Screen Translation” organised by the University of Bologna, the Roehampton University of London, the University of Oviedo in Spain, the Hoger Instituut voor Vertalers in Tolken Antwerp and the ATCR of the Universität of Saarlandes

**United Kingdom**
In the UK, dubbing is not used and subtitling is rare because the number of non-English programmes (in cinema and television) is quite limited. However, subtitling for the hearing impaired (RNIB) and audio-description for the visually-impaired (RNID) is extensive.

Surrey University, School of Arts, Centre for Translation Studies, and Roehampton, the Hispanic Research Centre, are all particularly active in organising conferences and training at European level.

Mention should be made of the training seminars organised by Henrik Gottlieb who is a specialist in audiovisual translation at the University of Copenhagen in Denmark as well as Yves Gambier, who is director of the “Centre for Translation and Interpreting” at the University of Turku, in Finland
Conclusions on training

Training is central to any discussion on dubbing and subtitling. All of the professions concerned highlight this area as one of the key challenges that will define the overall evolution of the sector and quality of translations and linguistic transfers.

The solutions proposed to respond to the observed needs do not always suggest a need for more training. Two opposing positions exist in this debate: on the one hand, the professionals declare that the number of training courses available for audiovisual translation are sufficient and even surplus to market needs; on the other hand, professionals complain of the lack of specific training for dubbing actors (in Germany or Luxembourg for example) or for audiovisual translators (in Austria, Italy, Ireland and Poland, for example).

Specific training for these jobs seems quite recent and can be traced to the linguistic disciplines, which are taught in specialised institutes or in universities as an option alongside language training. According to several dubbing/subtitling companies, the courses offered by the universities do not have a particular relevance to the professional world. Some quality control would seem to be necessary to ensure a more efficient connection between the training institutes and the professional milieu.

Furthermore, practicing professionals observe increasingly strong competition in audiovisual translation from young language studies graduates entering the profession.
Problems relating to the circulation of children’s programmes and animation

Children’s programmes are almost entirely shown in their dubbed form in the 31 countries surveyed, in both cinemas and on television. This is a particularly expensive practice, especially for the Scandinavian countries, which for the most part use subtitles for all other kinds of films. Norway, Sweden, Denmark and Finland (and also Netherlands) are the most expensive (dubbing a film for cinema release costs on average 52,000€, that is 66% higher than the European average). For this reason, in most European countries, the catalogue of children’s films is restricted to American or Japanese films or classics, for which it is always easier to get a cinema release. Apart from a number of exceptions, European films represent a commercial risk for distributors because the high dubbing costs affect the profitability of the film, which inhibits their sale to European distributors, especially in smaller territories. Professionals across Europe share this diagnosis, whether for a big territory, like France or in the smaller markets like the Czech Republic or Lithuania. There is a knock-on effect for exhibitors who are asked to programme films for younger audiences (for example those belonging to the Europa Cinemas network) who are faced with a limited selection in their own country. Young audiences, therefore, are not readily exposed to European cultural diversity, but rather to mainstream American and Japanese films.

Linguistic transfer is a requirement for the circulation of non-national audiovisual works. Whether it be through dubbing, subtitling or voice-over, the different techniques used today all aim to make foreign works available to national audiences. Though dubbing, subtitling and voice-over are necessary for it, they do not suffice to ensure the circulation of works, which depend principally on the complex elements related to the structure of different national markets and the interests of the main players in the system.

In the UK, for example, stakeholders in cinema distribution are principally American distributors, which explains why the market essentially focuses on US blockbusters, irrespective of linguistic considerations. In the UK, the TV market is very fragmented and programme selection is very competitive in a way that makes certain foreign language programmes economically unviable.

Besides the economic questions, legal considerations also play a role. In fact, the territoriality of rights often slows the intra-European circulation of works. This is particularly obvious in the case of the DVD and VOD windows. With the DVD release, the distributors are not allowed to include linguistic versions for countries for which they don’t have distribution rights. As for VOD, platform content cannot in principle be accessible outside the country where the platform is based. This poses a major problem, particularly in Central and Eastern Europe, where there are many cross-border minorities.

Finally, the question of promotion needs consideration. The circulation of non-national European films needs a strong promotional back-up which is too often lacking. Whereas
American stars are internationally recognised, the renown of national stars from EU countries rarely cross borders and establish themselves as European stars.

**The role of dubbing and subtitling European films in cinemas**

The role of dubbing and subtitling in the circulation of European cinema films needs to be evaluated in relation to the framework described above.

According to the data gathered by the European Audiovisual Observatory, in 2005, 2,930 American films were in circulation in Europe, 1,058 films of national origin and 2,078 of non-national origin.

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</thead>
<tbody>
<tr>
<td>European films:</td>
<td>2,578</td>
<td>2,542</td>
<td>2,608</td>
<td>2,608</td>
<td>2,948</td>
<td>3,136</td>
<td>16,421</td>
</tr>
<tr>
<td>of which, national films</td>
<td>868</td>
<td>880</td>
<td>896</td>
<td>906</td>
<td>1,023</td>
<td>1,058</td>
<td>5,633</td>
</tr>
<tr>
<td>of which, non-national European films</td>
<td>1,709</td>
<td>1,662</td>
<td>1,672</td>
<td>1,702</td>
<td>1,925</td>
<td>2,078</td>
<td>10,749</td>
</tr>
<tr>
<td>American films</td>
<td>3,553</td>
<td>3,422</td>
<td>3,223</td>
<td>2,948</td>
<td>3,275</td>
<td>2,930</td>
<td>19,350</td>
</tr>
<tr>
<td>Films from elsewhere in the world</td>
<td>474</td>
<td>536</td>
<td>530</td>
<td>671</td>
<td>730</td>
<td>821</td>
<td>3,762</td>
</tr>
<tr>
<td>total films distributed in Europe</td>
<td>6,605</td>
<td>6,500</td>
<td>6,361</td>
<td>6,227</td>
<td>6,953</td>
<td>6,887</td>
<td>39,533</td>
</tr>
</tbody>
</table>

*Source European Audiovisual Observatory, Yearbook 2006.*

American films amount to 42.5% of the films released in the European market, national films count for 15.4% of films released and non-national European films for 30.2%. These percentages can vary considerably from one country to another depending particularly on the volume of national production and the support it is accorded.

The table below shows the breakdown of non-national films released in cinemas in 2006 according to their origin and the linguistic version released. One finds that 11% of European films were released solely in dubbed versions compared to 17% of American films. 75% of European films were released in subtitled versions only compared to 66% of American films. 13% of European films were released in both dubbed and subtitled versions compared to 17% for American films.

<table>
<thead>
<tr>
<th></th>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>European films:</td>
<td>39.0%</td>
<td>39.1%</td>
<td>41.0%</td>
<td>41.9%</td>
<td>42.4%</td>
<td>45.5%</td>
<td>41.5%</td>
</tr>
<tr>
<td>of which, national films</td>
<td>13.1%</td>
<td>13.5%</td>
<td>14.1%</td>
<td>14.5%</td>
<td>14.7%</td>
<td>15.4%</td>
<td>14.2%</td>
</tr>
<tr>
<td>of which, non-national European films</td>
<td>25.9%</td>
<td>25.6%</td>
<td>26.3%</td>
<td>27.3%</td>
<td>27.7%</td>
<td>30.2%</td>
<td>27.2%</td>
</tr>
<tr>
<td>American films</td>
<td>53.8%</td>
<td>52.6%</td>
<td>50.7%</td>
<td>47.3%</td>
<td>47.1%</td>
<td>42.5%</td>
<td>48.9%</td>
</tr>
<tr>
<td>Films from elsewhere</td>
<td>7.2%</td>
<td>8.2%</td>
<td>8.3%</td>
<td>10.8%</td>
<td>10.5%</td>
<td>11.9%</td>
<td>9.5%</td>
</tr>
<tr>
<td>total films distributed Europe</td>
<td>100.0%</td>
<td>100.0%</td>
<td>100.0%</td>
<td>100.0%</td>
<td>100.0%</td>
<td>100.0%</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

*Source European Audiovisual Observatory, Yearbook 2006.*
The analysis by distribution territory allows us to see more clearly which practices apply according to the origin of a film. In countries where both practices coexist, in general American films are dubbed more often than European films. For example, in France, only 21% of European films were distributed solely in dubbed form compared with 35% of American films. On a similar note, 38% of European films were distributed only in their subtitled version and 14% of American films were. In Spain the proportion of American films distributed only in their dubbed version is higher than the equivalent proportion for European films (49% of American films compared to 24% of European films). Conversely, in Italy, the dominance of exclusively dubbed films is more obvious, whether it be for European films (77%) or American (85%).

In some subtitling countries such as Portugal or Romania, the practice does not vary according to the origin of the films but all foreign films are subtitled. However, in other countries, like Finland or Poland, differences are observed with a preference for dubbing American films (In Finland 2% of European films are dubbed compared to 10% of American films and 2% of European films are dubbed and subtitled compared to 9% of American films). In Poland 2% of European films are dubbed compared to 8% of American films and 0% of European films are dubbed and subtitled compared to 5% of American films).

The statistical data seems to confirm the distributors’ declarations from countries where both practices coexist, and which state that films with a greater commercial potential are normally dubbed and art house films—a description which seems to relate to a large part of European films circulation today—are mostly subtitled.

---

67 Se. Part I. C “Distributors”
Breakdown of non-national films released in cinemas in 2006, according to origin and linguistic version released, and by distribution territory

<table>
<thead>
<tr>
<th>Territoire de distribution</th>
<th>Films d’origine européenne</th>
<th>Films d’origine américaine</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>% de films seulement doublés</td>
<td>% de films seulement sous-titrés</td>
</tr>
<tr>
<td>AT</td>
<td>22%</td>
<td>28%</td>
</tr>
<tr>
<td>BE*</td>
<td>9%</td>
<td>91%</td>
</tr>
<tr>
<td>CH (1)</td>
<td>10%</td>
<td>70%</td>
</tr>
<tr>
<td>CY (1)</td>
<td>0%</td>
<td>100%</td>
</tr>
<tr>
<td>CZ*</td>
<td>0%</td>
<td>100%</td>
</tr>
<tr>
<td>DE*</td>
<td>38%</td>
<td>4%</td>
</tr>
<tr>
<td>DK (1)</td>
<td>8%</td>
<td>92%</td>
</tr>
<tr>
<td>EE*</td>
<td>30%</td>
<td>70%</td>
</tr>
<tr>
<td>ES (1)</td>
<td>24%</td>
<td>27%</td>
</tr>
<tr>
<td>FI</td>
<td>2%</td>
<td>96%</td>
</tr>
<tr>
<td>FR</td>
<td>21%</td>
<td>38%</td>
</tr>
<tr>
<td>GR*</td>
<td>0%</td>
<td>100%</td>
</tr>
<tr>
<td>HU</td>
<td>11%</td>
<td>89%</td>
</tr>
<tr>
<td>IE (1)</td>
<td>0%</td>
<td>100%</td>
</tr>
<tr>
<td>IT</td>
<td>77%</td>
<td>3%</td>
</tr>
<tr>
<td>LI (2)</td>
<td>7%</td>
<td>93%</td>
</tr>
<tr>
<td>LT*</td>
<td>0%</td>
<td>100%</td>
</tr>
<tr>
<td>MT (1)</td>
<td>0%</td>
<td>100%</td>
</tr>
<tr>
<td>NL</td>
<td>8%</td>
<td>92%</td>
</tr>
<tr>
<td>NO (1)</td>
<td>14%</td>
<td>86%</td>
</tr>
<tr>
<td>PL (1)</td>
<td>2%</td>
<td>98%</td>
</tr>
<tr>
<td>PT (1)</td>
<td>1%</td>
<td>97%</td>
</tr>
<tr>
<td>RO</td>
<td>0%</td>
<td>100%</td>
</tr>
<tr>
<td>SE*</td>
<td>0%</td>
<td>100%</td>
</tr>
<tr>
<td>SI*</td>
<td>0%</td>
<td>100%</td>
</tr>
<tr>
<td>SK*</td>
<td>0%</td>
<td>100%</td>
</tr>
<tr>
<td>UK (1)</td>
<td>4%</td>
<td>96%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>11%</td>
<td>75%</td>
</tr>
</tbody>
</table>

Because of a very few answers obtained from distributors, the data cannot be considered representative.

The data is originally taken from the questionnaire of European cinema distributors, except for:

1- Source: EFAD
2- Source: Cinema exhibitor in Liechtenstein, Shaan (Filmclub im TaKino)

The role of linguistic areas in the choice between dubbing and subtitling for television

In this context another element needs to be considered that concerns linguistic areas. In cinema, and even more so in television, the audience prefers the comfort of their national language. Foreign countries belonging to the same linguistic area\textsuperscript{68} therefore make up privileged territories in commercial relations.

\textsuperscript{68} On linguistic areas, see Part I.D “Practices according to media and genre of work” Examples of linguistic areas are French-speaking countries: France (leader country) French-speaking Belgium, Luxemburg, French-speaking

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Within each area, TV channels either buy films in the national language and films coming from other countries that speak the same language or they buy films in English. Television is identified by the audience as an instrument of leisure and it is the comfort of a familiar language which is primarily sought. This implies that a programme or a film not in English or not in the area language will not easily find its place in a different language zone.

A further problem is posed when “small” countries share the language of a “big” neighbour (Belgium, Austria…): broadcasters cannot subtitle foreign works because the audience will prefer to watch the same work broadcast in its dubbed version on a channel from its bigger neighbour. This limits the choice of broadcasters who depend on choices made by broadcasters in bigger countries.

This reality can also have an impact on cinema habits. In Luxembourg, for example, subtitling is traditionally preferred to dubbing in cinemas but, because the German-speaking community watch German channels and the French-speaking community watch the French channels, the films in cinemas are being released more frequently dubbed in German and in French.

Today, 75% of European works do not get a television broadcast outside of their own country. Furthermore, most European works broadcast are of national origin. That is why the new directive “Audiovisual Media Services”, consideration 36, suggests, that in the context of article 4, member states should encourage national TV channels to broadcast an adequate amount of European non-national works.

Selling non national European films to TV channels

The maps of Europe presented in Part I.D show that, in a certain number of countries, linguistic transfer practices are different for cinema and television. In some countries, subtitling is more prominent in cinemas whereas dubbing is the norm for television. This could pose problems in selling a film to a TV channel that was released only in its subtitled version in the cinema. While some distributors plan on having both versions from the beginning in order to sell the film to television, others are more reticent to invest in a double version. Furthermore, smaller channels, particularly cable and satellite channels, but also bigger channels in small countries, don’t always have the money to pay for dubbing. These sales to channels in countries that broadcast dubbed versions will be further complicated if the international version (M&E) has not been envisaged from the beginning by the producer (at the moment when the sound production is finalised). Remaking an M&E version that wasn’t done originally would cost too much compared to the value of the rights.

Switzerland. German-speaking countries: Germany (leader country), Austria, Liechtenstein and German-speaking Switzerland. English-speaking countries: UK (leader country), Ireland, Malta. Italian-speaking countries: Italy (leader country), Italian-speaking Switzerland. Greece (leader country) and Cyprus are also linked to each other.

69 Source: European Broadcasting Union (EBU)
70 Recital 36 states: “When implementing the provisions of Article 4 of Directive 89/552/EEC as amended, Member States should encourage broadcasters to include an adequate share of co-produced European works or of European works of non-domestic origin”. Article 4 of the new Directive “SMA” : “Member States shall ensure where practicable and by appropriate means, that broadcasters reserve for European works a majority proportion of their transmission time, excluding the time appointed to news, sports events, games, advertising, teletext services and teleshopping. (...)”.

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The MEDIA programme does not currently allow distributors already supported for subtitling to apply again for financial support to dub the same work.

Conclusions on the problems relating to the circulation of European works

Programmes for children are almost entirely shown in their dubbed form, in both cinemas and on television, in the 31 countries surveyed. This is a particularly expensive practice, especially for countries that for the most part use subtitles for all other kinds of films. Young audiences, therefore, are not readily exposed to European cultural diversity, but rather to mainstream American and Japanese films.

Linguistic transfer is necessary for the circulation of non-national audiovisual works but transfer does not suffice to ensure the circulation of works, which depend principally on the complex aspects related to the structure of different national markets and the vested interests of the main players in the system. Also, legal considerations such as the territoriality of rights often slow the intra-European circulation of works.

According to European Audiovisual Observatory data, American films count on average for 42.5% of films released on the European market, national films for 15.4% and non-national European films for 30.2%. These percentages can vary significantly from country to country depending notably on the levels of national production and the national support given.

According to MCG data for 2006, 11% of European films are released solely in their dubbed version compared with 17% of American films. 75% of European films were released in only subtitled versions compared to 66% of American films. 13% of European films were released in both dubbed and subtitled versions compared to 17% for American films. Analysis by distribution territory show that, in countries where both practices coexist, in general American films are dubbed more often than European films.

In this context another element to be considered is linguistic areas. In cinema, and even more so in television, the audience prefers the comfort of their national language. Foreign countries belonging to the same linguistic area are therefore privileged territories in commercial relations, which contribute to the fact that most non-national works do not circulate on television. That is why the new directive “Audiovisual Media Services”, consideration 36, suggests that, in the context of article 4, member states should encourage national TV channels to broadcast and adequate amount of European non-national works.

The impact of the MEDIA Plus policy on dubbing and subtitling


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For “Cinema Distribution – automatic support”, reinvestment in module 3 envisages covering distribution costs (prints, dubbing and subtitling), promotion and publicity for non-national European films.

For “Cinema Distribution – Selective support”, the part of the support intended to finance the linguistic diversity of works (i.e. the cost of dubbing and subtitling) takes the form of a subsidy (up to a maximum of 50% and capped at 30,000/40,000€).

For “Cinema Distribution – Support for sales agents”, the reinvestment in module 2, column 2 envisages covering prints and production costs (including dubbing and subtitling copies of the film).

For “Cinema Distribution – support for releasing works on VHS or DVD”, for reinvestment in the cost of manufacturing the DVD, subtitling and dubbing costs are eligible.

For “Cinema Distribution – support for TV broadcast”, the dubbed and subtitled versions are among the criteria that allow the Commission to attribute extra points to producers applications.

For “Promotion – market access”, subtitling and translation costs are eligible for films participating in the promotion project.

For “Festivals”, translation and subtitling (the term ‘dubbing’ is not mentioned) costs are eligible for films screened during the supported festival.

**Methodological approach to MEDIA Plus statistics**

The following data requests were made to the Executive Agency

- for intervention in “Cinema Distribution” (automatic and selective support, sales agents, video): the number of projects that benefited from MEDIA support for dubbing and the number for subtitling, and the amount of this support;

- for “Promotion – market access” and “Festivals”: the number of events that included subtitling and/or dubbing in the eligible costs and the amount of these costs paid by MEDIA;

- for “TV Broadcast”: the number of works supported that had dubbing and subtitling points, and the number of dubbed and subtitled versions mentioned by the companies supported.

This requested data cannot be found on the project follow-up section of the MEDIA Plus database. Given this limited availability of information, most statistics received do not deal with dubbing and subtitling information, but simply indicate the number and origin of projects supported, the total budget of projects and the amount of MEDIA support.

Considering the aim of the study, the most relevant information concerns selective distribution support as it details: the number of projects supported, the origin of film distributors, the total budget of the projects and the amounts relating to both dubbing and subtitling and the total amount of MEDIA support, including the amount of support accorded to dubbing and subtitling (combined). For the other categories it is not possible to distinguish the proportion of MEDIA support awarded specifically for dubbing and/or subtitling, nor for the expenses relating to dubbing and/or subtitling within the overall project budget.
Therefore, taking account of the specific objectives of the study, it was decided to focus on this category.

However, it is necessary to mention that, for this category, the data is not entirely complete for the years 2005 and 2006. This gap in the statistical tables, relating to the origin of the data (a financial database that only takes into account payments made, and not those committed to but that remain outstanding for projects begun in 2005 and especially in 2006), suggest analysing only the years 2001 to 2004.

**Summary and analysis of MEDIA programme data (Selective support)**

1- Projects applying for MEDIA programme selective support for dubbing and subtitling.

*The number and nationality of applicant projects*

For the period 2001-2004, 1,095 projects requested MEDIA support for dubbing and subtitling.

The largest number of projects were presented by German distributors (96 projects or 8.8% of all projects presented between 2001 and 2004), Italian (96 projects or 8.8%) and Spanish (94 projects or 8.6%)

The rate of projects increased over the period. In 2004 they reached the highest level of 360 (or +35.8% compared to 2003). The increase in the number of applicant projects in 2004 is particularly noteworthy for Portugal, Norway, Bulgaria and Poland.

The increase in applicant projects is constant from one year to another in Belgium, Greece and Norway.

On the other hand, there was a reduction in the number of applicant projects from Iceland, the UK and Finland as well as from Italy and Spain, despite a 2004 rebound for these two countries.
Selective support for dubbing and subtitling:
Annual number of applicant projects according to distribution territory

<table>
<thead>
<tr>
<th>Distribution area</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2001-2004</th>
</tr>
</thead>
<tbody>
<tr>
<td>AT</td>
<td>5</td>
<td>8</td>
<td>10</td>
<td>4</td>
<td>27</td>
</tr>
<tr>
<td>BE</td>
<td>13</td>
<td>13</td>
<td>23</td>
<td>25</td>
<td>74</td>
</tr>
<tr>
<td>BG</td>
<td>1</td>
<td>12</td>
<td>25</td>
<td></td>
<td>38</td>
</tr>
<tr>
<td>CH</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CZ</td>
<td></td>
<td>7</td>
<td>8</td>
<td></td>
<td>15</td>
</tr>
<tr>
<td>DE</td>
<td>26</td>
<td>25</td>
<td>20</td>
<td>25</td>
<td>96</td>
</tr>
<tr>
<td>DK</td>
<td>13</td>
<td>17</td>
<td>11</td>
<td>15</td>
<td>56</td>
</tr>
<tr>
<td>EE</td>
<td></td>
<td>2</td>
<td>9</td>
<td></td>
<td>11</td>
</tr>
<tr>
<td>ES</td>
<td>31</td>
<td>21</td>
<td>17</td>
<td>25</td>
<td>94</td>
</tr>
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<td>FI</td>
<td>13</td>
<td>15</td>
<td>9</td>
<td>8</td>
<td>45</td>
</tr>
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<td>FR</td>
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<td>11</td>
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<td>67</td>
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<td>HU</td>
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<td></td>
</tr>
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<td>4</td>
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<td></td>
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<td>NL</td>
<td>19</td>
<td>8</td>
<td>15</td>
<td>18</td>
<td>60</td>
</tr>
<tr>
<td>NO</td>
<td>9</td>
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<td>14</td>
<td>21</td>
<td>57</td>
</tr>
<tr>
<td>PL</td>
<td>3</td>
<td>13</td>
<td>14</td>
<td>20</td>
<td>36</td>
</tr>
<tr>
<td>PT</td>
<td>16</td>
<td>10</td>
<td>14</td>
<td>25</td>
<td>65</td>
</tr>
<tr>
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<td>15</td>
<td>20</td>
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<td>15</td>
<td>64</td>
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<tr>
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<td>4</td>
<td>9</td>
</tr>
<tr>
<td>SK</td>
<td></td>
<td></td>
<td></td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>UK</td>
<td>14</td>
<td>13</td>
<td>12</td>
<td>9</td>
<td>48</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>246</td>
<td>224</td>
<td>265</td>
<td>360</td>
<td>1095</td>
</tr>
</tbody>
</table>

Source: MEDIA Programme

Breakdown of applicant projects according to linguistic version distributed

Most projects applying for MEDIA selective support for dubbing and subtitling between 2001 and 2004, envisage distributing the film only in its subtitled version (63% of projects).

Certain countries differentiate themselves from this tendency with a majority of projects that envisage either only dubbing or both dubbing and subtitling: Italy (only 5% of Italian projects envisage subtitling only), Spain (15%) and Germany (27%).
Selective support for dubbing and subtitling:
Breakdown of annual applicant projects according to language transfer method,
and by distribution territory (2001-2004)

<table>
<thead>
<tr>
<th>Territoire de distribution</th>
<th>Nombre de films seulement doublés</th>
<th>Nombre de films seulement sous-titrés</th>
<th>Nombre de films doublés et sous-titrés</th>
<th>% de films seulement doublés</th>
<th>% de films seulement sous-titrés</th>
<th>% de films doublés et sous-titrés</th>
</tr>
</thead>
<tbody>
<tr>
<td>AT</td>
<td>2</td>
<td>20</td>
<td>5</td>
<td>7%</td>
<td>74%</td>
<td>19%</td>
</tr>
<tr>
<td>BE</td>
<td>2</td>
<td>63</td>
<td>9</td>
<td>3%</td>
<td>85%</td>
<td>12%</td>
</tr>
<tr>
<td>BG</td>
<td>3</td>
<td>34</td>
<td>4</td>
<td>89%</td>
<td>11%</td>
<td></td>
</tr>
<tr>
<td>CH</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CZ</td>
<td>14</td>
<td>1</td>
<td>0%</td>
<td>93%</td>
<td>7%</td>
<td></td>
</tr>
<tr>
<td>DE</td>
<td>24</td>
<td>26</td>
<td>46</td>
<td>25%</td>
<td>27%</td>
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<td>63%</td>
<td>28%</td>
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</table>

Source: MEDIA Programme

This preponderance of applicant projects envisaging distribution in subtitled version only grows stronger every year: they represent 68.1% in 2004 compared to 53.7% in 2001. This preponderance is directly linked to changes in practices relating to the circulation of films. In countries where dubbing and subtitling coexist (Germany, Austria, France, Spain, Belgium…), European films are more and more often released in subtitled versions, particularly when they are identified as “art house” films.\(^{71}\)

The comparison between MEDIA Plus data (2001-2004) and the table of linguistic transfer practices (2006, see p.67) is not relevant as the data does not relate to the same period. Only the percentage of dubbed-only films are similar (9% for the MEDIA Plus table and 11% for the transfer practices table).

\(^{71}\) See. Part I.C “Distributors”.

Media Consulting Group / Peacefulfish
To better understand the specificity of Italy (only 5% of Italian projects envisage subtitling only), Spain (15%) and Germany (27%) in linguistic transfer practice, an analysis was done of applicant projects for dubbing and subtitling support (2001-2004).

If we look at the list of films that German distributors included in their application for selective MEDIA-Distribution for dubbing and subtitling, it seems that the choice between dubbing, subtitling or both versions depends on an evaluation of the film’s potential to respond to quite different variables.

Thus, in Germany, a film like Eric Rohmer’s L’anglaise et le duc makes an application for a double version, as well as other French films such as Mademoiselle by Philippe Lioret or 8 Femmes and Swimming Pool by François Ozon. Le fabuleux destin d’Amélie Poulain by Jean-Pierre Jeunet also applied for a double version but with the particularity of requesting a higher amount for subtitling over dubbing. Only a subtitled version was envisaged for Sous le sable (by the same François Ozon, but a film previous to the other two mentioned above), for Vodka Lemon by Kurdish director Hiner Saleem, for Satin Rouge by Raja Amari, for La Captive by Chantal Akerman or for Le Pornographe by Bertrand Bonello.

A dubbed only version was envisaged for more commercial films such as Le pacte des loups or Les rivières pourpres, for animation films such as La prophétie des grenouilles but also for comedies like Le placard by Francis Veber.

Le fate ignoranti by Ferzan Ozpetek is the only Italian film where only a subtitled version is envisaged, whereas other Italian films in the same genre (art house comedy), such as Agata e la tempesta by Silvio Soldini request support for a double version. This seems to be the most

72 Source: MEDIA Programme. Data refers to project applications presented between 2001 and 2004 for which relevant information was available.

If we look at the distribution of English films, the double version was proposed for *Lucky Break* the comedy by Perer Cattaneo but also for a drama like *The Mother* by Roger Michell and the dramatic comedy *Ae Fond Kiss* by Ken Loach. Predictably genre films such as the horror picture *The Hole* by Nick Hamm requested only dubbing support. On the other end of the scale *In this world* by Michael Winterbottom envisaged subtitling only.

Among the films proposing a double version are Scandinavian films such as the Icelandic *Noi albinoi* by Dagur Kari, the Danish *It’s all about Love* by Thomas Vinterburg and the Finnish *A Man without a Past* by Aki Kaurismaki. Other films from the same geographic region requested support only for subtitling —maybe because the filmmakers were less well known— films such as *Ondskan* by Mikael Häfström (Sweden), *Buddy* by Morten Tyldum (Norway). On the other hand, the comedy *Italian for beginners* by Lone Scherfig requested support only for dubbing.

Austrian films *Le Temps du Loup* and *La Pianiste* by Michael Haneke and *Hundstage* by Ulrich Seidl requested subtitling aid only.\(^{73}\)

To summarise, films intended for subtitled distribution only, in Germany, come from a variety of origins: French, Italian, Austrian, English… Generally speaking, it is the potential audience for the film that guides the distributors' choice, but on closer examination, it’s not easy to see why, for certain films, distributors choose to subtitle only rather than have a double version. An intimate knowledge of each market and its history is required. Thus, a film like *Le fate ignoranti* was released only in its subtitled version whereas another Italian film that could be considered in the same genre, such as *Agata e la tempesta* is released in double version. Does this depend on different editorial choices (distributors are not all the same)? On the fact that at the time of *Le fate ignoranti*, Ferzan Ozpetek was less well know than Silvio Soldini, who made *Agata e la tempesta* following the success of *Pane e tulipan* (*Bread and tulips*)? Rather than seek to make general conclusions, we will simply give selected examples of choices made for the above mentioned countries (Germany, Italy, Spain).

In **Spain**, almost all requests for subtitling and dubbing support envisage a double version.

Among the French films are *Amélie Poulain* and *Intimacy* by Patrice Chéreau, *L’anglaise et le duc* by Rohmer, *Sous le sable*, *8 femmes*, *Swimming pool* and *5x2* by François Ozon, *Irreversible* by Gaspard Noé, *Les choristes* by Christophe Barratier *Comme une image* by Agnès Jaoui, all making a funding request for the double version, and films like *Le pacte des loups*, *Les rivières pourpres* 2 and *Le placard* for which in Germany only the dubbed version was envisaged. The only French films envisaged only in subtitled version were *La captive* by Chantal Akerman (like in Germany), *Presque rien* by Sébastien Lifshitz, *Swing* by Tony Gatlif (although his following film, *Exils*, proposed the double version), *Eloge de l’amour* by Godard, *Son frère* by Patrice Chéreau and *Tais-toi* by Francis Veber.

All Italian films distributed in double version (*Le fate ignoranti* by Ferzan Ozpetek, *L’ultimo bacio* by Gabriele Muccino, *Respiro* by Emanuele Crialess, *Dopo mezzanotte* by Davide

\(^{73}\) Both Michael Haneke films are in French and *Hundstage* is in German and Turkish.

\(^{74}\) Cf. Part I. C – “The Cinema market”
Ferrario, *Buongiorno, notte* by Marco Bellocchio) except for *La finestra di fronte* by Ferzan Ozpetek (subtitled only). From the same director, *Le fate ignoranti* a few years before was distributed (by the same distributor) in double version. Maybe a lack of success for the double version discouraged the distributor from taking too much of a risk with the next. Surprisingly, though, a risk was taken with a small film like *Dopo mezzanotte*. Maybe its unexpected success in Italy encouraged the Spanish distributor.

Among the English films, *The Hole*, *Bread and Roses*, *Gosford Park* by Robert Altman, *Magdalene Sisters* by Peter Mullan, *The Mother* and *Ae fond kiss* proposed the double version whereas *In this world* by Michael Winterbottom is the only English film proposed in subtitled version alone.

Among the other European films requesting help only for subtitled versions are the Austrian *Le Temps du Loup* by Michael Haneke, the Norwegian *Kitchen Stories* the Portugese *Vai e vem* by Cesar Monteiro and *O principio da incerteza* by Manoel de Oliveira (by the same director, *Um filme falado* requested support for the double version).

In Italy, *Mademoiselle* by Philippe Lioret, *La comédie de l’innocence* by Raoul Ruiz and *Swimming pool* by François Ozon were the French films that applied for subtitling only. A double version was envisaged for films such as *L’Anglaise et le duc*, *Amélie Poulain*, *Va savoir* by Jacques Rivette, *8 femmes*, *Swing* and *Exils* de Tony Gatlif, *Son frère*.

Only the dubbed version, however, was considered useful for comedies such as *Le placard* or *Vatel* by Roland Joffé but also *La captive* by Chantal Akerman (a film subtitled only in the other two countries in this sample) or *Le pornographe* by Bertand Bonello.

The only English film for which only subtitling assistance was requested was *There is only one Jimmy Grimble* by John Hay. The other films proposed only dubbing (*The Hole*, *Gosford Park*) or the double version (*Lucky Break, Bread & roses, In this world, Ae fond kiss*).

Among the other European films asking only for subtitling support were: *Um filme falado* by Manoel de Oliveira. Perhaps because the linguistic diversity, which is an inherent characteristic of the film, prompted the distributors, out of respect for the author’s intentions, to opt for subtitling only.

Smaller films such as the Icelandic *The Sea*, by Baltasar Kormákur and *Noi Albinoi* by Dagur Kari are dubbed only. Once again, the reasons for choosing to subtitle films such as *Swimming pool* by François Ozon and to dub *Noi Albinoi* by Dagur Kari should be the subject of a deeper examination that goes beyond the framework of this study.

Comparing the linguistic transfer choices from a sample of films distributed in Germany, Spain and Italy are presented in the table below. Films that German and Spanish distributors chose to subtitle were dubbed in Italy (*La captive, Le temps du loup*) or done in double version (*In this world*). For the other films the correspondences were different: The same choice was made in Germany and Italy for *The Hole*; The same choice was made in Germany and Spain for *Swimming pool*; The same choice was made in Spain and Italy for *La pianiste*. 
Linguistic treatment of films: comparative examples

<table>
<thead>
<tr>
<th>Film</th>
<th>Germany</th>
<th>Spain</th>
<th>Italy</th>
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<tr>
<td><strong>La captive</strong> (FR)</td>
<td>Subtitled version</td>
<td>Subtitled version</td>
<td>Dubbed version</td>
</tr>
<tr>
<td><strong>In this world</strong> (UK)</td>
<td>Subtitled version</td>
<td>Subtitled version</td>
<td>Double version</td>
</tr>
<tr>
<td><strong>Le temps du loup</strong> (AT, OV French)</td>
<td>Subtitled version</td>
<td>Subtitled version</td>
<td>Dubbed version</td>
</tr>
<tr>
<td><strong>Le pacte des loups</strong> (FR)</td>
<td>Dubbed version</td>
<td>Double version</td>
<td>---</td>
</tr>
<tr>
<td><strong>The hole</strong> (UK)</td>
<td>Dubbed version</td>
<td>Double version</td>
<td>Dubbed version</td>
</tr>
<tr>
<td><strong>Swimming pool</strong> (FR)</td>
<td>Double version</td>
<td>Double version</td>
<td>Subtitled version</td>
</tr>
<tr>
<td><strong>La pianiste</strong> (AT)</td>
<td>Subtitled version</td>
<td>Double version</td>
<td>Double version</td>
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</table>

*Source: MEDIA Programme*
2- Projects chosen for MEDIA programme selective support for dubbing and subtitling

During the period 2001-2004, 928 projects were supported by MEDIA for selective support for dubbing and subtitling.

Selective support for dubbing and subtitling:
number of projects supported by year and according to distribution territory.

<table>
<thead>
<tr>
<th>Distribution area</th>
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<th>2004</th>
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Source: MEDIA Programme

In the period 2001-2004, 85% of projects applying for selective support for dubbing and subtitling were successful.

In 2004, the proportion of projects supported fell to 67% (from more than 92% each of the previous years). This fall is due to the particularly high number of applications in 2004.

The countries for which the rate of support is highest, relative to the number of applicant projects, are Austria (96.3% of applicant projects were successful), Germany (94.8%), Norway 93,0% and Italy (92.7%).
The country having the lowest rate of successful applications was Greece (50% for the period) and for each of the years 2001-2004.

Selective support for dubbing and subtitling:
rate of supported by year and according to distribution territory.

<table>
<thead>
<tr>
<th>Distribution area</th>
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<td>84.7%</td>
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</table>

Source: MEDIA Programme

3- The amounts awarded to those benefiting from the MEDIA Programme’s selective support for dubbing and subtitling.

The amount and breakdown of the total sums awarded

For the period 2001-2004, more than 6.6 million euros was awarded by the MEDIA Programme in selective support for dubbing and subtitling.

The annual amount of these contributions went from 1.8 million euros in 2001-2002 to 1.5 million euros in 2003-2004.
Selective support for dubbing and subtitling:
total amounts awarded by year according to distribution territory
(in thousands of euros.)

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<td>1 522</td>
<td>6 651</td>
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</table>

Source: MEDIA Programme

The countries that received the highest amounts for the period are Italy (1.6 million euros, or 25% of all sums awarded), Germany (1.3 million euros or 19%) and Spain (1.1 million euros or 16%).

The annual amount of support to Spanish and Italian projects, however, is in constant reduction (respectively from 22.5% in 2001 to 13.3% in 2004, and 29.6% to 20,1%)
Selective support for dubbing and subtitling:
Proportion of total annual support according to distribution territory

<table>
<thead>
<tr>
<th>Distribution area</th>
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<th>2004</th>
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</tr>
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</tr>
<tr>
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</tr>
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<tr>
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<td>0.3%</td>
</tr>
<tr>
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<tr>
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<td>100.0%</td>
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</table>

Source: Programme MEDIA
Amounts awarded by project

For the period 2001-2004, the average amount of support awarded per project was about 7,200 euros.

Not surprisingly, given the expense of dubbing in comparison to subtitling, the countries with highest average rates of support are those where most projects envisage dubbing: Italy (18,500 euros), Germany (14,100 euros), France (13,900 euros) and Spain (13,600 euros).
Selective support for dubbing and subtitling:
Average project award by year according to distribution territory (euros)

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<th>2004</th>
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Source: Programme MEDIA
Overall impact of MEDIA Plus-Distribution’s selective support for the release of feature films can be summarised as follows for 2001-2004:

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</tr>
<tr>
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<tr>
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<tr>
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<td>89</td>
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<td>x</td>
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<tr>
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</tr>
<tr>
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</tr>
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<tr>
<td></td>
<td>928</td>
<td>6175</td>
<td>15,02</td>
</tr>
</tbody>
</table>

Sources : Programme MEDIA OEA
In 10 countries, MEDIA support represented a contribution to at least 1 film in 5 released in those countries (Bulgaria, Germany, Denmark, France, Iceland, Netherlands, Norway, Sweden, and the UK); in 2 countries (Spain and Poland) MEDIA support helped 1 film in 6; in the other countries MEDIA support aided less than 1 film in 10. Enough information wasn’t available for 8 countries (Cyprus, Greece, Ireland, Italy, Lithuania, Luxembourg, Malta, Portugal).

**Provisional conclusions regarding the impact of MEDIA Plus**

The support awarded by MEDIA Plus for the dubbing and subtitling of European films confirms the tendencies observed in the principal dubbing markets, which are gradually opening up to distributing subtitled original versions of films. The support awarded to the German, Italian and Spanish markets demonstrate this. Along with France, these four territories concentrate most of MEDIA Plus support in financial terms while. In terms of projects, the sharing of support is more balanced and many territories benefit from the release campaigns of supported films.

However, it was difficult to compare MEDIA Plus results with those of the study in regard to distributors on the question of costs. Differences exist and are the result of using different methodologies (costs eligible for MEDIA Plus applications not including prints) and the cost of the transfer plus the copy in the study.

Finally to evaluate the impact of MEDIA Plus for the industry, it would be necessary to compare the MEDIA Plus budget for dubbing and subtitling only with the total turnover for the same sector concerning European films.

Neither is it possible to evaluate the real impact of MEDIA Plus in financial terms because MEDIA Plus data for 2005 and 2006 was not available and the estimation of turnover for the sector includes all films (including American films).

The impact of MEDIA Plus must therefore be viewed in terms of supported release campaigns at the level of each country, particularly in the smaller countries and the new Member States that, as mentioned above, represent a higher number in terms of projects supported than the big countries.

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**Provisional conclusions regarding the impact of MEDIA Plus policy**

The support awarded by MEDIA Plus for the dubbing and subtitling of European films confirms the tendencies observed in the principal dubbing markets, which are gradually opening up to distribution original subtitled versions of films.

Four dubbing territories concentrate most of MEDIA Plus support in financial terms while, in terms of projects, the sharing of 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).

Considering the method of awarding support, it is not possible at this stage to make a direct comparison with the market prices.
**F - Problems relating to accessibility**

Among the Member States, the disparity of measures to address difficulties of accessibility is significant. The existence of this kind of measure is thanks to the concerted efforts of groups and organisations who represent the interests of audio- or visually-impaired people, to TV channels and to governments. While referring also to Part I of this report, which describes the legal framework[^75] of this area, here the focus is on professional practice in cinema distribution and TV broadcast.

**Accessibility problems for cinemas**

In the cinema, the practice of screening films for deaf and hearing-impaired people is very rare and is even more so with audio-description for the blind and visually-impaired. They are often isolated initiatives, supported by once-off subsidies by associations or by government. Some particular cases have been observed: in Poland the “ARS Krakow Cinema Center” organised screenings for handicapped people thanks to the support of a member of parliament; in Belgium the “Cinémas Churchill” set up a project thanks to subsidies from the city of Liege, the Walloon region and the film industry. In the Netherlands, the “Lux” cinema has conducted audio-description tests for the blind and visually-impaired thanks to the support of a producer and a loan of equipment.

In Germany, cases of distributing subtitled copies for the deaf and hearing-impaired are very rare. Kinowelt says it distributed 6 or 7 films in 2006 that were accessible to deaf and hearing-impaired audiences thanks to the TTS (text to speech) system. The films screened were US blockbusters and national films. In Germany also, another distributor stresses that audiences not familiar with subtitles specific to the hearing-impaired find the experience “strange”. In Austria, there are cinemas equipped for the hearing-impaired. Sometimes associations organise screenings for the handicapped with the authorisation and cooperation of the film’s distributor. In the UK there are also cases of special screenings for English films with the support of the UK Film Council; In France, only a few cinemas are equipped. Among the recent examples is the screening of *La môme*[^76], with subtitles for the hearing-impaired and audio-description for the visually-impaired. In the Czech Republic, there are cinemas such as Village Cinemas in Prague that try and maintain regular screenings of films accessible to the handicapped.

The two main problems faced by these kinds of screenings are the lack of funding to equip cinemas and the very limited supply of films having audio-description or subtitles for the hearing-impaired.

This prompts the questions: Why are distributors not motivated to invest in special copies of their films to increase accessibility? Is the lack of films available due to the rarity of screenings or is it due to the lack of cinemas equipped? As with the specific linguistic versions, economic criteria are at the heart of the decision, more specifically the relationship between the cost and the number of copies. Exhibitors also stress that there isn’t a real demand: Village Cinemas in Prague for example say that though they have all of the

[^75]: Cf. Part I. A “Questions of Accessibility”
[^76]: *La môme* (*La Vie en Rose*), by Olivier Dahan, France / UK / Czech Republic 2007, original version in French.
equipment necessary, they receive very few requests. This finding is not shared by all professionals: Belgian and Dutch exhibitors, for example, observed high attendances at the special audio-description screenings they organised. In terms of cost, the extra cinema-related expenses to show prints with special subtitles and prints with special auto-description are borne by the cinema owners. The technical service providers say that it takes 1 eight-hour day to carry out the subtitling of 25 minutes of a film. The adaptation cost of subtitling a film in France is around €1,500, to which must be added the technical costs which vary according to the methods and media used (video burning, DVD mastering, VOD coding, etc…) and on whether or not it is part of a larger standard subtitling package for the same film and using the same medium.

The state of cinema equipment is almost never surveyed at national level. It is only in some European countries that the levels of cinema equipment can be determined. In Finland, nearly 130 screens are equipped for visually- and hearing-impaired audiences (induction loop); about 200 screens in Norway are equipped (induction loop/infrared systems); 62 screens in Denmark; 30 screens in Switzerland. In Ireland 19 screens are equipped for screenings for the hearing-impaired and 1 screen for the visually-impaired. In the UK, in 2006, 218 screens (out of 3,440) screened films accessible to the visually- and hearing-impaired; in France, it was 414 screens (out of 5,366), but subtitling for the hearing-impaired only.

In this area, the role of digital technology can be crucial: digital copies with multiple soundtracks allow each individual viewer to choose their language version, including the choice of an audio-description version. But this technical possibility does not ensure that audiences will have this full choice of versions. However, as with the reinforced regulation of television (i.e. the reinforced “SMAV” directive) across Europe, it cannot be excluded that the same obligations will be required of cinema and new media.

**Problems of accessibility for television**

In the area of TV broadcast, accessibility policies vary according to the channels. Four main groups can be identified:

- Channels that do not have large financial resources and only occasionally offer programmes for the hearing-impaired (e.g. Markiza in Slovakia or FilmMuzeum in Hungary);
- Channels that have a relatively fixed proportion of programmes in their schedule intended for the hearing-impaired (e.g. TSR in Switzerland, Estonian TV in Estonia, YLE in Finland);
- Channels that offer a schedule of programmes that is almost entirely accessible to the hearing-impaired. These are mostly public service channels (e.g. the BBC in the UK, ARTE France, TV Slovenia, NPS in the Netherlands, and, among the private channels: VTM in Belgium, for the subtitling in Flemish of significantly numerous Dutch programmes. This particular case does not imply a specially made intra-linguistic version for the hearing impaired).
- Channels that do not have a real policy in the area (small channels with low ratings) but which will have greater obligations to do so.
For now it is impossible to have a precise idea of the number of hours broadcast in versions accessible to the handicapped. However, discussions with TV channels allow us to establish a range from the lowest hourly volume to the highest for the sample of channels surveyed, which give a good idea of the range of practices in this area: 5% of programmes for Markiza in Hungary to 90% for the BBC in the UK.

These differences need to be put into the context of the legal requirements in each country; the existence or not of national legislation relating to providing access to visually- or hearing-impaired audiences can explain the existence or not of TV accessibility policies. Generally speaking, public service channels surveyed have more obligations to ensure accessibility or a stronger will to instigate measures to facilitate access to their programmes for visually- or hearing-impaired viewers.

This is the case in Slovenia where the TV Slovenija channel stresses that its status as a public service channel carries with it more responsibilities than for private channels.
In the Netherlands, the December 2006 media legislation envisages that, by 2010, public services broadcasters must have 95% of their live programming subtitled. Likewise, in Belgium, new legal requirements (Sept 20 2006) relating to accessibility in Flanders requires that all news programming on the 10 Flemish channels must include tele-text subtitling. In France, there is extensive legislation that the channels must respect. As for the BBC, the UK has one of the most complete sets of legislation dealing with accessibility and the BBC itself has also signed specific commitments relating to accessibility, which commit the channel to provide 100% of its programmes in subtitled versions for hearing-impaired viewers.

Accessibility policy, when it exists, is especially focused on the hearing-impaired. The only channel\(^{77}\) that regularly practices audio-description is the BBC (8%). The technique most often used to give access to hearing impaired viewers is subtitling. Sign language is used for certain specific programmes (live news, for example). Audio-description raises not only equipment problems but also more general financial problems. ARTE France explain that because audio-description takes up an audio channel for itself, this removes the possibility of broadcasting the programme in double version (subtitled and dubbed), forcing a choice in who to prioritise. This problem can be resolved with digital transmission.

The BBC is exemplary in terms of accessibility policy for both hearing- and visually-impaired viewers. The reasons for this exemplarity are the extent of British legislation regarding accessibility but also the BBC’s own policy. Through an agreement in 1996, the BBC committed itself to following the directives of OFCOM (the UK regulatory body) relating to accessibility. These directives relate to providing services for the deaf, the hearing-impaired and the visually-impaired, and allows for subtitling, sign language and audio-description requirements. This code covers the public channels, the digital broadcast services, licensed content, limited TV services as well as all digital TV programmes supplied by the Welsh authority. Furthermore, the BBC has agreed to provide, by 2008, 100% of its programmes subtitled and to make 10% of its programmes accessible to the blind and hearing-impaired.

Today, besides subtitling for the hearing-impaired and audio-description, the BBC also provides live subtitling using two new techniques: stenography and “respeaking”.

The research into the TV channels policy on accessibility also revealed the fact that European countries do not adhere to the same technical norms when producing versions for the hearing-impaired.

\(^{77}\) In the sample of channels surveyed during the 2\(^{nd}\) part of the study.
and visually-impaired (the EBU show that there are 2 different standards for audio-description and 3 for hearing-impaired subtitling)\textsuperscript{78}. This lack of harmonisation is a hindrance to productivity.

Regarding subtitling for the deaf and hearing-impaired, the question of quality is not the same as for standard subtitling. In fact researchers working in the area say that for the moment the hearing impaired audiences do no ask for a better \textit{quality} of translation but a greater \textit{quantity} of subtitled programmes. Countries that have such a high level of competence in the field that they can turn their attention to questions of quality are rare; for the moment in most European countries, the demand for improvement is more quantitative than qualitative.

This demand also has economic implications as handicapped people may also represent a commercially interesting target for advertisers. The market might therefore finance part of the extra cost related to making programmes accessible. This is already the case in the UK, where Sky has made considerable progress and now invests around €2.5 million a year in accessibility.

\textbf{Conclusions regarding Accessibility}

Between the member states, the level of disparity in measures that tackle accessibility is significant.

\textit{In the Cinema}, screenings of films accessible for deaf and hearing-impaired audiences are rare and this is even more the case for audio-description for the blind and visually-impaired. Where they do exist, they tend to be isolated initiatives supported by concerned organisations and the state.

The principal difficulties for these types of screenings are the lack of funding to equip the cinemas and the limited supply of films that use subtitles and audio-description for these audiences.

\textit{In TV broadcasting}, accessibility policies vary enormously between channels. It is presently 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\%)

The research into TV channel policy on accessibility also revealed that European countries do not adhere to the same technical norms when producing versions for the hearing- and visually-impaired. This lack of harmonisation is a hindrance to productivity

\textsuperscript{78} Cf. EBU report on Access Services, June 2004.
Illiteracy and audiovisual and cinema consumption

Certain university researchers such as Yves Gambier who work in the field of audiovisual translation have formulated the hypothesis that there may be a correlation between broadcasting subtitled works and the absence of illiteracy in these countries, because these TV viewers will have a familiarity with reading subtitles.

In an article published in 1997, Gambier observed that, in countries that favour subtitling, such as the Nordic countries, watching 3,000 hours of subtitled programming a year is the equivalent of reading 200 books of 300 pages each, or of reading a book about every two days.

This is an interesting theory but requires epistemological caution. No European viewer watches 3,000 hours of fiction on TV every year, where there are many other types of programme that are in their own language (news, sports, magazines, games). Also, we need to take account of the level of equipment in homes, notably the difference between homes equipped with digital receivers offering subtitled multi-lingual shows and those still using analogue receivers.

For the part of the analysis that relates to the relationship between television and the use of language, we have used several context indicators, presented in the following table.

We have used the illiteracy levels by country as provided by the World Fact Book (2005). Other indicators used are the number of homes that have a TV set (including digital TV), the annual average hourly TV consumption per person and the average number of films watched.

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<table>
<thead>
<tr>
<th>Country</th>
<th>Average annual TV viewing (hours)</th>
<th>Number of homes with TV (thousands)</th>
<th>Proportion of homes with digital TV (%)</th>
<th>Average annual cinema attendance per person</th>
<th>Illiteracy level (%)</th>
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<td>25 211</td>
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<td>2.59</td>
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</tr>
</tbody>
</table>

Source: Media Consulting Group 2007
The comparative graphic analysis, based on data available, shows that no correlation can be established between the consumption of cinema and television and illiteracy whatever the indicators used.

The “average annual cinema attendance” measure has absolutely no correlation with illiteracy levels. This can be confirmed by the general comparison (in descending order (illustration 1) or in comparison by geographic zones with regard to subtitling and dubbing (illustration 2)). If we use the criterion of TV consumption rates there is no correlation either, even if we factor in the context “homes with digital TV” (levels of equipment in descending order, illustration 4) or by zone (illustration 5).
No correlation was found between the context indicators used here and illiteracy rates.

Based on current available data it is not possible to conclude that, in countries that favour subtitling, illiteracy has reduced (or been eliminated) through the beneficial effect of reading subtitles on television.
Figure 1 - Average cinema theatre activity per inhabitant & per year vs Illiteracy rate

Average number of cinema theatre admissions per inhabitant per year vs Illiteracy rate (%)

Average number of cinema admissions per inhabitant per year

Illiteracy rate (%)
Figure 2 - Average number of cinema theatre admissions per inhabitant vs Illiteracy rate
Figure 3 - Average annual duration of TV viewing hours vs Illiteracy rate
Figure 4 - Share of digitally equipped TV households vs Illiteracy rate
Figure 5 - Share of digitally equipped TV households vs Illiteracy rate

- Dubbing
- Subtitling and voice-over countries
- Subtitling countries

Share of digitally equipped TV households (%)
Illiteracy rate (%)
Conclusions on illiteracy and audiovisual and cinema consumption

The comparative graphic analysis, based on data available, shows that no correlation can be established between the consumption of cinema and television and illiteracy whatever the indicators used.

It is not possible to conclude, in countries that favour subtitling, that illiteracy is diminished or eliminated through the beneficial effect of reading subtitles on television.
Multilingualism, cinema and television

In the article mentioned in the preceding paragraph, Yves Gambier analyses the relationship between viewers and subtitles and observes that the speed of subtitle reading is related to age, education level, the level of understanding of the programme’s original language and the type of action happening on the screen. A number of studies show that “the phonetics of the foreign language are assimilated as the semantic meaning is grasped”. He concludes that “screen text is not just a stopgap if it also helps to reduce illiteracy and reinforce the motivation to learn languages”.

At a time when Europe is promoting the benefits of multilingualism and a policy to promote learning languages in the EU, we decided to analyse the potential links between multilingualism and media by focusing particularly on their potential links with the learning and practicing of foreign languages.

It is anticipated that era of digital cinema will favour niche markets and the specific programming of linguistic versions of films (whether in particular versions for specific screenings or localised depending on linguistic areas). Likewise, digital television will permit several audio tracks and subtitles for the same programme giving television a role in the development of multilingualism.

For this research we have used the European reference study, the Eurobarometer, which updates at regular intervals its representative samples of the European population and allows us to follow and understand certain evolutions.

Positioning audiovisual in learning and practicing languages

The European Union has launched several studies on Europeans and their languages. The recent Eurobarometer (EB 64.3 of Feb 2006) gives many interesting indications on the capacity of Europeans to speak a language other than their first language and on the ways they use to learn them.

From a questionnaire study of 28,694 citizens, aged over 15, we’ve extracted some of the most significant responses to enrich the contextual analysis, particularly in regard to the forms that multilingualism takes in Europe and on the role that media (TV, cinema, radio) plays in learning and using foreign languages.

Multilingualism in Europe

According to the authors of this study “Today the European Union covers 450 million people from different ethnic, cultural and linguistic origins. The linguistic models of European countries are complex, created by history, geographical factors and the mobility of people”.

At the time of the study, The European Union had 20 official languages and around another 60 indigenous and non-indigenous languages spoken in the EU. Since January 1st 2007 there are 23 official EU languages.

According to the study, “the term multilingualism refers both to a situation where several languages are spoken in a specific geographical area and to the capacity of a person to master several languages. In both respects, multilingualism is a European characteristic”.

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81 From a Euro barometer Special Study Feb 2006, “Europeans and their languages”
**Who speaks what?**

German is the mother tongue that is most spoken in Europe (18%) followed by English and Italian (13%) and French (12%);

As for foreign languages spoken in Europe, the linguistic map of Europe seems to be limited to 5 languages: English, French, German, Spanish and Russian;

1.4% of European citizens speak a regional language (Sami, Breton, Welsh);

However, observing broadcasters practices (and the linguistic areas in which the works circulate) does not reveal any correlation between these practices and the supply of television nor even cinema (see part II; B).

**More than one language per person?**

The most noteworthy findings are the following:

“56% of European citizens can hold a conversation in a language other than their first language and 28% say they speak two languages other than their first language.

Approximately 1 in 10 respondents have sufficient language skills to hold a conversation in three other languages.

However, a substantial number, 44% of Europeans, say they cannot speak any language but their native language.”

The results of the study show that the linguistic capacities seem slightly better in the smaller member states such as Luxembourg, Netherlands and Slovenia, while Mediterranean citizens and those from the English speaking countries, the UK and Ireland, seem to have less linguistic diversity.
The multilingual profile of Europe?

If we examine the group of respondents who speak at least two languages more than their native tongue, we discover that the “multilingual” European is defined as:

- Young
- Educated
- With multilingual foundations (for example, born in another European country or having parents from another European country)
- Works in management or is a student, occupations that more often require the use of foreign languages
- Motivated to learn
When do Europeans use foreign languages?

According to Eurobarometer, languages other than the native language are most often used on foreign holidays: 42% of Europeans declare that they use their first foreign language when they are on holiday, while 44% say it is the case for their second foreign language. About a quarter of Europeans say they use their first foreign language when watching television or at the cinema or listening to music (26%), communicating with friends (25%) or in work conversations (25%). At individual country level, the Danes (74%), Swedes (67%) and Austrians (66%) most often use a foreign language on holidays, while it is the case for only 2% of Italians and 6% of Latvians.

68% of the Luxembourg population and 67% of the Maltese say that they use their foreign languages watching or listening to foreign language programmes. Cypriots and Estonians (49%) are the most frequent users of foreign languages at work.

At the time of the study, in the accession countries and the candidate countries, the use of languages other than the native tongue in the situations mentioned above seemed limited. The most significant were 37% of Croats, 33% of Bulgarians, 30% of Romanians who said they used their foreign languages watching television, films or listening to the radio, while 29% of Turks have conversations with friends in a language other than their native language.

How do Europeans learn foreign languages?

Most Europeans in the study said they learn languages in school. 65% of European citizens say that school is the place languages are learned and, far behind, 22% say that it is with teachers and a group. Studying languages in intensive classes with a native speaker or in a country where the language is spoken are cited by 16% and 15% respectively. Personal learning methods, such as with audiovisual materials (10%) or by watching television or listening to the radio (9%) are only cited by a small number (see illustration below).

And it should be added that the respondents prefer social or collective environments to learn languages rather than do it alone.
Preference for watching a film or foreign TV programme subtitled rather than dubbed.

This response demonstrates quite clearly that European tastes seem to correlate with TV viewers preferences because only a minority of them prefer to watch films subtitled and that television is only considered by 10% of those surveyed as a language learning tool.
It reinforces the broadcasters position that observes that there is a marked drop in audiences when a film is shown in its subtitled original version in a country where dubbing is favoured.\(^8^2\)

**Provisional conclusions**

The ways of learning languages and the number of languages spoken in the different countries does not really conform to the map distinguishing between countries that prefer dubbing or subtitling films.

Living in a country where television is dubbed is not a particular handicap in learning languages.

It seems that small countries with limited scope for their language are more open (by necessity?) to learning the languages of other Europeans.

For these countries (such as Malta, Cyprus and Luxembourg), the languages most often spoken are English and German.

The maps for this study EB 64.3 do not correspond with the audiovisual maps presented in this study. It’s not surprising because television only plays a secondary role in language learning. Furthermore, it seems clear that the profile of a multilingual European does not correspond directly with the profile of an average TV viewer, who is older, more female and less educated.

Finally in subtitling countries, the results of study EB 64.3 do not reveal specific correlations between languages spoken and audiovisual supply. While citizens from small countries, like Luxembourg, Malta, Cyprus and the Baltic countries did respond to the EB 64.3 questions, it is also true that it is in these countries that the TV data is most incomplete. A more detailed study in these areas could possibly bring further information.

And if TV played a role (not a very strong one, as we’ve said) maybe it is more by local immersion and possibly with the benefit of intra-linguistic subtitling which is, however, practiced very little (BBC, TV5, YLE).

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**Conclusions on the relationship between multilingualism and cinema and television**

It cannot be confirmed that in subtitling countries, illiteracy has diminished or been eliminated through the benefits of reading subtitles on television.

About a quarter of Europeans state that they use their first foreign language watching television or films or listening to the radio (26%), communicating with friends (25%) or having conversations at work (25%).

European preferences seem to correlate with TV viewers preferences because only a minority of them prefer to watch the subtitled version of a film, and television is considered by only 10% of those surveyed to as a language learning tool.

The ways to learn languages and the number of languages spoken in the different countries do not match the breakdown of countries according to preferences for dubbing or subtitling.

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82 See Part II. A
Television does not play an important role in learning languages, apart from the minor role it plays through intra-linguistic subtitles (though not very common in Europe) associated with a total immersion in a foreign country.

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.
H – Recent digital contributions to dubbing and subtitling

According to the technical companies surveyed in the bigger countries, such as Germany, Spain and France, it is the technical aspects and work methods such as tape, transfers and security keys that will change the most due to the digital changeover, whereas the creative aspects like adaptation, translation and dubbing actors will remain the same except maybe through translation software. Today’s translation software has improved a lot since it first came out. However, for many reasons, the main dubbing and subtitling companies don’t use it except for further verification of translations already done. For big films, this method seems to be entirely excluded both by the director and the distributor.

For dubbing, digitalisation allows the simplification of the production process, in particular the necessary “rythmo band” stage which has been replaced by software applications. This should allow a 30% saving of time in recording sessions.

Companies also estimate that digitisation will bring productivity gains at administration levels: the transfer onto VHS cassettes, for example, will no longer be necessary. Also, the use of new software (Digidesign or Protools) has already permitted, in Germany for example, productivity gains in data transfer. The tendency now is to do everything by computer (recording decks and mixing). Some companies anticipate that new technologies like mobile phone television will also necessitate a new culture in subtitling based on key words more than on phrases.

Digital cinema will give distributors and exhibitors interesting new opportunities both in terms of choice for audiences and in terms of cost reduction. However, the question cannot be fully appreciated without looking at the exhibition situation in each country because digitisation, above all, means equipping cinemas, which implies investment in equipment that is prohibitively expensive for smaller exhibitors. There will not be digital distribution as long as the cinemas are not equipped for this type of projection and the question of sharing the costs between distributors and exhibitors is now being discussed in several countries. In a country like Greece, a distributor may say “we are not financially ready for cinema digitisation”. Or, in the UK, a distributor may wonder about the transition period: because all of the cinemas and TV channels will not make the changeover to digital at the same time, there will be an “intermediary” period during which distributors will have to supply both film and digital versions for the same film.

Distributors agree that subtitling costs, especially burning copies, will reduce considerably because of digital. Another advantage is that digital will allow greater flexibility in choosing subtitles for a film, making it possible to offer screenings with different subtitles in response to any potential demand from speakers of minority languages.

But the development of digital cinemas will eliminate the profession of distributor as we knew it (printing copies and delivering them to exhibitors) when digital distribution, with a single computer click, will to transfer the copy to the cinema that has acquired the specific exhibition rights (film/version/locality).

Piracy issues were raised by some professionals surveyed who reminded us of the importance to be given to security systems to protect the digital distribution and exhibition of films.

Exhibitors agree on the advantages digital projection will bring in terms of flexibility of programming such as: the possibility of dubbed and subtitled versions of the same film; subtitled versions of the same film in a variety of languages; versions accessible to the visually- and hearing-impaired.
Digital is also an opportunity to distribute in smaller countries that are less well catered for linguistically, in border regions and in cities that have big linguistic minorities. Some also imagine “geographic” versions for particular Chinese or Hindu neighbourhoods in large cities. But the economic model that may prevail for these commercial variations is not yet convincing as the current costs of linguistic transfer remain very high.

The TV channels situation regarding digital transmission varies a lot depending on the country. In some cases, broadcasters are preparing the changeover to digital; in other cases the channels are already transmitting digitally. Digitisation poses different problems for dubbing and subtitling and the question of different linguistic versions remains unanswered as do questions regarding availability home equipment that is capable of receiving special services (audio-description, multi language subtitles etc).

Some broadcasters believe that digital transmission will have an impact sooner on subtitling than on dubbing where the “human” factor of the actors will remain. It is especially technical procedures that will be affected by digital. Others say that digital will encourage the development of voice recognition software. However such software, today used by channels such as the BBC, show their limits, for example in recognising certain accents or types of vocabulary.

Nevertheless, digital transmission can bring accessibility solutions for the hearing- and visually-impaired. Intralinguistic subtitling could even become a source of revenue. At present, on the Red Bee Media internet site, Channel 4 provides the database of subtitles for programmes broadcast by the channel. It’s a commercial service mostly used by other English language broadcasters.

Digitisation will increase the volume of subtitling and dubbing with the increase in the number of TV channels and programmes. According to German technical company, it is unlikely that subtitling quality will diminish because the competition between channels will oblige them to respect certain subtitling levels in order to ensure the loyalty of their viewers and, thus, ensure their advertising revenue.

Digital transmission and multilingualism

As regards providing viewers, digital allows the development of “double versions” and of “multilingual versions”. TV channels, for example, will be able to offer both the dubbed and subtitled version for the viewer to choose from. This, of course, depends on having a receiver

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83 Here we should mention “respeaking”, a technique where an operator (the “respeaker”) listens to a text and translates it at the same time while dictating it to “speech recognition” software that transforms speech into written text. Respeaking is developed to resolve accessibility problems, notably for the hearing-impaired. Respeakers work in soundproofed cabins (like interpreters do) and are usually in teams of 2. Their microphone needs to be adjusted to their environment and the respeaker must also conform to a vocal style that the software can capture. From a phonetic point of view, the respeaker must pronounce each word as clearly as possible and must also “readapt” the text because the result will be a written text but also because the hearing-impaired have, on average, more limited language skills.

84 The BBC is the broadcaster that most uses respeaking, principally to subtitle live or semi-live programmes (news, parliamentary sessions, sport, special events) but also for pre-recorded programmes such as films.

85 Red Bee Media is the technical service that provides the BBC and other British channels such as Channel 4. For the BBC, it takes care in particular of its accessibility services (intralinguistic subtitling, sign language, audio-description)
that is equipped for this. The aim of channels like Arte in France is to propose this possibility for a large part of its programming, notably including prime time cinema.

In other cases, the viewers can choose between subtitled versions in different languages: in Russian or Estonian, for example, in the case of Estonian public television. In Finland, the choice of language will no longer be made at programme level on a given channel, but a channel on the public broadcaster YLE will be entirely transmitted in Swedish, while the others will continue to be transmitted in Finnish.

In the UK, the BBC intends offering new on-line services: for example a documentary already broadcast on a subject like the partition of India will be transmitted on-line (therefore available on digital television) and dubbed in other languages such as Pakistani and Indian languages. It is the first time that the BBC is attempting an experiment like this, which is made possible only because of digital transmission technology. Analogue did not offer such possibilities of double or multiple versions. The BBC will also, by the end of 2007, launch the “iPlayer”, a catch-up TV system on the internet which gives viewers the possibility of watching programmes after they’ve been broadcast. There is also an objective to provide subtitling for the deaf and hearing-impaired with 100% of “iPlayer” content. Such subtitling can certainly be provided for pre-recorded programmes, whereas subtitling live programmes or their audio-description pose problems that are still being studied.

Video on Demand also offers opportunities for multilingualism. Furthermore, it allows programme providers to know the linguistic versions chosen by viewers, thus giving useful knowledge of viewer habits.

Finally, technical service providers are developing multimedia and multilingual transmission interfaces allowing the subtitling of programmes in several languages with the possibility to go from one language to another in real time as well as changing the size of the subtitle characters. Such an interface could have a number of commercial applications, from promoting programme sales (multi-lingual trailers, for example) to internet transmission.

**Digital broadcasting and accessibility**

Broadcasters in general, especially public service broadcasters in the European Broadcasters Union, have for a long time been thinking about ways of better serving minorities, particularly minorities with sensorial handicaps that form a significant part of the audience. According to statistical studies, in Europe this type of population can vary from 10% (European estimate for 2002) to 25% of Europe’s population in 2020 (including people over 60 and people with genuine sensorial handicaps). According to the EBU and its members, this population of several million constitutes a group that must be served in the name of public service. Studies of this area identify 4 techniques that are adapted to the needs of these different populations (‘hearing- or visually-impaired, for example) and by programme type (recorded and stored programmes or live information and news). These methods are categorised in the following table:

**Subtitling**

Three types of subtitling exist for different uses:

- Prepared and set in advance, for stored programmes, TV drama, films, animation, etc.
- Semi-live subtitling
- Live subtitling (sports, news)

**Spoken subtitling** from a synthesised voice for visually-impaired and dyslexics, via software that uses existing subtitles

**Audio-description** for the blind and visually-impaired, which is an audio description of images and decors that is added to the audio track destined the blind and visually-impaired audiences.

**Sign language** where a specialised interpreter appears in a corner of the screen. Meant for those who are deaf from birth and have difficulty reading subtitles (TV news and special events).

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**Access services overview**

<table>
<thead>
<tr>
<th>AUTHORING</th>
<th>EXCHANGE/DISTRIBUTION</th>
<th>DELIVERY</th>
<th>PRESENTATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prepared subtitling</td>
<td>VHS-tape</td>
<td>+Teletext in VBI fixed/spread</td>
<td>+Receiver with Teletext</td>
</tr>
<tr>
<td>Semi-live subtitling</td>
<td>VBI, DVD</td>
<td>*DVB subtitling (EN 300 743)</td>
<td>*DVB subtitling receiver</td>
</tr>
<tr>
<td>Live subtitling</td>
<td>File-based (floppynetwork)</td>
<td>*DVB Teletext (EN 300 472)</td>
<td>*DVB Teletext receiver</td>
</tr>
</tbody>
</table>

**SPOKEN SUBTITLEING**
- Subtitles turned into synthesized speech (autom.)
  - Synthesized speech (audio)
  - Synthesized speech with fade information
- Teletext packet 31 data
- Pre-mixed DVB audio
- DVB audio with fade info
- Receiver + special receiver
- Non-mixing DVB receiver
- Mixing DVB receiver

**AUDIO DESCRIPTION**
- Script and fade information turned into additional audio
  - Audio with description signal
  - Description signal and control track, synchronised with video
  - One half of a stereo pair
  - AM radio
  - Pre-mixed DVB audio
  - DVB audio with fade info
  - Second audio channel
  - AM radio receiver
  - Non-mixing DVB receiver
  - Mixing DVB receiver

**SIGNING**
- Signer interprets speech and action in vision
  - Signer on tape, server or live
  - Closed signing in research
  - Signer superimposed
  - Additional vision component
  - Analogue receiver
  - Digital receiver
  - Digital receiver with mixing capability or avatar-animation
Conclusions on recent digital contributions to dubbing and subtitling

According to the technical companies surveyed in the bigger countries like Germany, Spain and France, it is the technical aspects and work methods that will change the most due to the digital changeover, whereas the creative aspects like adaptation, translation and dubbing actors will remain the same except maybe for translation software. Companies also estimate that 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. However, the question cannot be concluded without looking at the exhibition situation in each country because digitisation above all means equipping cinemas, which implies investment in equipment that is prohibitively expensive for smaller exhibitors.

The situation for TV channels regarding digital transmission varies a lot depending on the country. Some broadcasters believe that digital transmission will have an impact sooner on subtitling than on dubbing where the “human” factor of the actors will remain. It is especially technical procedures that will be affected by digital developments.

Digital technology could bring advantages in accessibility to programmes for visually- and hearing-impaired viewers. In terms of supply and choice, digital allows possibilities of “double versions” and “multilingual versions”.

Source: EBU
Part III. Conclusions and recommendations

Conclusions

This Study on dubbing and subtitling needs and practices in the European audiovisual industry gives an overview of a complex and dynamic situation. Within a given country, the practices are often varied. They depend on medium and format, the target audience and whether the country is part of a particular linguistic area. Though subtitling and dubbing are the principal modes of audiovisual linguistic transfer, voice over is a very common practice in Eastern European countries.

As regards cinema, Europe is more a subtitling zone than a dubbing one. However, dubbing countries (in particular the 4 big countries – Italy, Spain, France, Germany – as well as Austria, French-speaking Belgium, French-speaking and Italian-speaking Switzerland), represent a significant part of the population, and of audiovisual production and distribution volume. European television tends to favour dubbing (ten countries, Italy, Spain, France, Germany, Austria, Hungary, the Czech Republic, Slovakia, Switzerland, and French-speaking Belgium). Also, voice-over is practiced in 5 countries (Bulgaria, Poland, Latvia, Lithuania and Estonia to a lesser degree).

According to estimates for 2007 (on the basis of 2005 data), the TV channels demand for dubbing and subtitling of European works is about 122,500 hours; for the cinema market, the total number of hours of European works to be dubbed or subtitled is estimated at 3,793. It is on these volume estimates (not forgetting versions for the visually- and hearing impaired) that the necessary budgets for European support mechanisms for dubbing and subtitling can be estimated.

In volume terms, less programme hours are dubbed than are subtitled. However, from an economic viewpoint the impact of dubbed hours is greater on a high number of national markets. Furthermore, they occupy a crucial place on a cultural level. In all of the 31 European counties surveyed, it is standard linguistic transfer practice to dub films for young audiences.

As regards equal access to audiovisual content, specific techniques permit the accessibility of works for the hearing- and visually-impaired: subtitling for the deaf and hearing-impaired and audio-description for the blind and visually-impaired are the most common techniques used (certain types of TV programme use different techniques such as sign language and respeaking). At present, the audience demand is not satisfied by the market (with exceptions). Only a small proportion of European works are accessible to visually and hearing impaired persons. With time, the development of digital technology and transmission should see an richer more plentiful supply in this category.
Specific conclusions regarding problems of quality in audiovisual translation, the circulation and accessibility of works and technological development are presented below.

Conclusions regarding the quality of the audiovisual translation

The quality of audiovisual translation will be a major issue in the evolution of subtitling and dubbing in Europe.

The quality of audiovisual translation (time spent on research, time spent on contextual analysis, verification) is being threatened by pressure on the structural variables of the market: price, volume, deadlines.

The problems of quality of the audiovisual translation are not always caused by an insufficiency of existing training courses.

Conclusions regarding the circulation of works

A large majority of European audiovisual works do not circulate between countries, especially on television channels.

Language transfer (dubbing/subtitling) is a necessary but insufficient condition to enhance the circulation of European audiovisual works.

The circulation of European audiovisual works is faced with technical questions when going from one medium to another in certain European countries, notably when a film subtitled for cinema release then requires a dubbed version for TV broadcast.

Within linguistic areas, the choice of distributors and broadcasters for small countries is determined by the language choices made by the leader countries. For broadcasters, there are two constraints: a) subtitling films broadcast in dubbed version on channels of countries within the same linguistic area; and b) broadcasting films for which a dubbed version does not exist, and must be paid for by the channel itself.

In several countries, European films are underrepresented in children's films catalogs.
Conclusions regarding the accessibility of European audiovisual works

In terms of accessibility, the volume of programs available to hearing/visually-impaired persons is generally speaking very low, and does not meet the demands of this population segment. Moreover, the level of accessibility does not meet the recommendations of article 3b of the future “Audiovisual Medias Services” directive to be adopted at the end of 2007. The current business model of this sector of activity is incompatible with the requirements which are related to the implementation of this article 3b.

The absence of harmonization between technical standards concerning versions available to hearing/visually-impaired persons constitutes an obstacle to the productivity and circulation of these versions within linguistic areas.

Conclusions regarding technological research and multilingualism

An absence of dialogue between research carried out on digital technologies, notably as part of the FP7, and financed research on multilingualism, is penalizing the perspectives of future technological innovation, whereas the two fields converge as regards audiovisual broadcasting.

In conclusion, the linguistic transfer of audiovisual works through dubbing, subtitling or voice over is a necessary condition for the circulation of works in Europe, but not a sufficient one in itself. In reality, the challenges facing the circulation of works are not limited to dealing with the way of treating the linguistic diversity that is a characteristic of the European Union, but rather responding to more complex questions relating to the structure of national markets, to the interests of the principal players in the system, to legal questions (territoriality of rights) and to promotional strategies and the marketing of works.
Recommendations

Recommendations regarding the 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 regarding the circulation of works

1. Support the creation of “packages” of linguistic versions (dubbed versions + 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, thereby offering European viewers a choice between the dubbed versions and the subtitled versions of a given work in their own language. 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, right from the post-production of a work (cinema or TV), an international version (Music & Effects band), whereby the purpose of this master version would be 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 (creation of a module n° 4 in which the “packages” referred to in §1 above could be acceptable).

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. For example: a dubbed Spanish version for Latin America; a dubbed English version for TV channels where English is widely spoken (Asia, Scandinavian countries).
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. The content of the stations’ guidelines will be determining factor as regards the feasibility of this proposal.

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. This aid could be assessed via the criteria already used in MEDIA Distribution.

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**Recommendations regarding the 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.

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**Recommendations regarding 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 (further research into the field of teaching and training, best practices).
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