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

Executive Summary

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Notice

This document is the executive summary of a study on dubbing and subtitling needs and practices in the European audiovisual industry.

The opinions given in this report are those of the authors; thus, this report does not necessarily reflect the point of view of the Commission, and the Commission cannot be considered liable for the accuracy of the information in the report.

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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 <u>cinemas</u>: 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 <u>television</u>: 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[1] 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).

[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.

Multilinguism, 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.

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[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.

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.

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).