

2010

# External Action in the Audiovisual Media



Directorate General of Global Affairs, Development and Partnerships

**T**he media occupy a growing place in the lives of individuals and societies and are key factors in the influence of French values and culture. As in the case of other cultural goods, only the combined efforts of the public authorities and professional sectors can guarantee and strengthen the presence of French images on the world's screens.

In parallel to the reform of broadcasting in France, this country's policy for external action in the audiovisual media has seen radical change since 2007 with, in particular, the creation of the national

programme company "Audiovisuel Extérieur de la France" (AEF).

This reform has reshaped a system that operates in a highly competitive sector of crucial importance for France's influence in the world, which cannot be evaluated in purely financial terms.

The media occupy a central position in our societies and are key factors in all democratic processes, especially in the most fragile countries. Cooperation in the field of the audiovisual media is consequently one of the priority aims of the Ministry of Foreign and European Affairs.



Newsroom © France 24





# More competitive French images

## A world of television in rapid expansion

Because the international French television channels (France 24, TV5MONDE, ARTE, Canal+, etc.) have enlarged the number of their potential viewers by a strategy of multimedia diversification, their audience has expanded on cable, satellite, DTT and now multimedia (internet and mobile):

- **TV5MONDE** now exceeds 207 million homes connected and is the second global network after the music channel MTV. With its new strategy plan, its weekly audience is now 54 million viewers: the launch of the first French youth web channel Tivi5Monde in June 2009 was a new stage in attracting a public of young French-speakers;

- **France 24** continues to progress (weekly audience of 20 million) with excellent results in North Africa and French-speaking sub-Saharan Africa. In all, the channel reaches 115 million homes;

- **Radio France Internationale** is a broadcaster of reference, particularly at times of crisis, as evidenced by its presence in Haiti after the earthquake;

## CONTINUAL ADVANCE BY FRENCH FILM INDUSTRY

In most countries in the world, French films are second in the foreign film market only to American ones. In 2008, admissions to French films abroad (85 million entries) had never been so high and increased even faster than in France. Ticket sales were also a record (€421 M).

The IFOP polling organisation estimates that 80% of foreigners wanted to visit France after seeing French films in their home countries. In 2009, however, sales fell as a result of the economic crisis.

France's cooperation policy for the audiovisual media makes a major contribution to developing working relationships and trust among operators, promotion agencies and regulators. For example, Turkey is working with the Centre national du cinéma et de l'image animée (CNC) to draft a law in this area.



French cinema takes centre stage at many festivals - © UNIFRANCE

- **ARTE** is investing increasingly in fiction and documentaries produced for the Web and is pursuing a quality brand strategy;
- **Euronews** has increased both its audience and the number of languages it uses (Turkish version launched in January 2010).

Despite a particularly difficult environment (dwindling advertising budgets, DTT, thematic channels and new media less profitable than terrestrial broadcasting), the sales of French programmes are holding up, thanks to success with fiction. Despite a slight drop in value in 2008 (down 1.5% to €150 million), hours sold (40,000) have continued to grow over ten years.

**Canal France International** pursues its strategy of attracting developing-country buyers to French productions and this will lead to a growth in the purchase of French programmes by television companies that had received them free of charge. This development will likely cause only a slight reduction in the use of French images, compensated by better exposure for our programmes, because they have been directly selected by acquisition managers and will be given better viewing slots.

Although the general situation is good, the fact remains, as pointed out by the 2006 Hadas-Lebel report, that the production and transmission of French fiction is lower than that of our European neighbours, mainly due to the inadequate size of the repeat broadcast market.

### **Music: a sector under threat but still dynamic**

Most French music is now exported in digital form and sales abroad have reached historic levels. Export earnings are vital for the professional structures in this sector.

The Act setting up the high authority for the dissemination of creative works and protection of rights on the internet (HADOPI) is a key element in the government's support for the music sector's fight against piracy.

### **BUDGET FOR EXTERNAL AUDIOVISUAL MEDIA**

Public resources devoted to external audiovisual media are some **€335 M**

- |   |          |
|---|----------|
| • Directorate General for the Media and Cultural Industries (Ministry of Culture)         | €233,1 M |
| • Audiovisual licence fees received by external audiovisual operators                     | €63,9 M  |
| • Priority solidarity fund and development aid (Ministry of Foreign and European Affairs) | €21 M    |
| • CulturesFrance  | €2,6 M   |
| • Audiovisual media attachés  | €5 M     |
| • Autres contributions (INA, France Télévision, etc.)                                     | €10 M    |



Deutsche Welle and the BBC also devote considerable resources to their external broadcasting.

Foreign Office funding enables BBC Radio alone to employ 4,000 staff in its World Service (compared with just over 1,100 at RFI).



## Expanding into new global regions

**Europe** is the prime market for French films and music (roughly 50% of exports) followed by the **United States** (20%).

**For television and radio programmes, French-speaking Africa is the clear leader.** RFI, TV5MONDE, and France 24 post excellent results in this region. Although the advance of French channels is remarkable in almost all regions, competition is much fiercer in the countries of North Africa and the Middle East.

**For that reason France 24 is developing its offering in Arabic, with significant success throughout North Africa, and Canal Overseas has returned to Morocco and Tunisia.**

TV5MONDE is the leading non-Arabic channel in Morocco. In Algeria, it attracts 3.2 million viewers a week.

In the Arabic-language market as a whole, TV5MONDE's cumulative weekly audience has increased by 26% in a year to 8.24 million viewers. France 24 reaches 1.6 million opinion-leaders in North Africa.

# Young people and modern communications

The French authorities intend to target French audiovisual media within the world of communication as a priority of international policy.

The aim is to:

- contribute to France's influence in the world;
- promote solidarity;
- ensure consistent regulation of the audiovisual sector.

## A NEW INSTRUMENT, THE AUDIOVISUEL EXTÉRIEUR DE LA FRANCE (AEF)

A wholly State-owned holding company, Audiovisuel extérieur de la France (AEF), has been created for the main purpose of consolidating public shareholdings in the various external audiovisual companies.

AEF's objective is to significantly increase the visibility of the external audiovisual companies and the quality of programmes, while generating numerous synergies between the companies. The aim is to propose an innovative multimedia offering that expresses cultural diversity, the French way of life and the values of the French-speaking world.

Audiovisuel extérieur de la France is now fully incorporated. Its board and senior management have been nominated and an objectives and performance contract will shortly take effect. At present AEF holds 100% of RFI and France 24 and 49% of TV5MONDE.

In the case of TV5MONDE, agreement was reached after extensive discussions with the other French-speaking partners. With its special status as a multilateral French-speaking channel, TV5MONDE is therefore a partner rather than a subsidiary of AEF.



© RFI

### Major components of audiovisual reform

In order to ensure greater coherence and clarity in France's action in the audiovisual media throughout the world, a reform of external public audiovisual media was decided by the French President in the summer of 2007 to modernise and more effectively coordinate the entities they comprise, namely Radio France Internationale (RFI) and its subsidiary Monte Carlo Doualiya, France 24 and TV5MONDE.

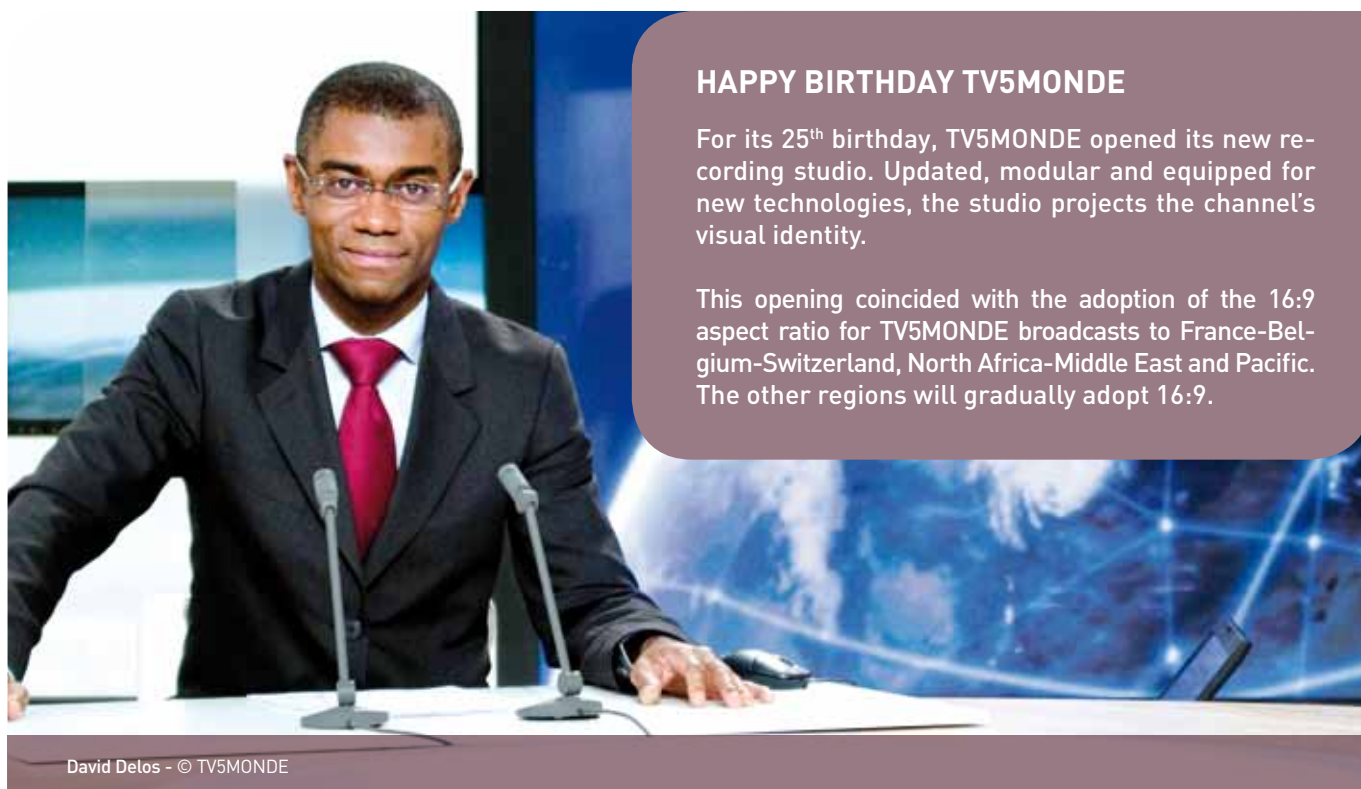
A new strategy plan for **TV5MONDE**, has been approved by donor governments for 2009-2012. Under this plan, TV5MONDE will implement the following priorities:

- **expand subtitling** (from 9 to 12 languages);
- **consolidate global distribution and expand its audience** while going fully digital;
- **strengthen its multimedia development** by a "global media" strategy: expansion of webTV, content offerings for all non-TV appliances, particularly mobiles;
- **improve content offering**: better programmes, simulcasting, 16:9 aspect ratio.

On **France 24**, AEF management increased Arabic broadcasting from 4 to 10 hours a day on 27 April 2009, using synergies with Monte Carlo Doualiya, RFI's Arabic-language subsidiary. Programming was updated to provide more time for live broadcasts and improve the channel's flexibility. One of AEF's aims is to extend the audience beyond opinion-leaders in particular regions, as is already the case in French-speaking Africa.

The modernisation of **RFI** is one of the key elements in the reform of external broadcasting; there are three main objectives:

- **start to win back audiences**: in terms of content, AEF management has already revamped the programming to revitalise the channel, with more time for economics and music. In terms of languages, an extensive reform is underway. This will mean increasing content in certain languages deemed to be strategic (English, Brazilian Portuguese, Hausa, Swahili);
- **modernise radio distribution**: RFI already has a website dedicated to mobile phones;
- **modernise management**, adapting job profiles and production methods.



**HAPPY BIRTHDAY TV5MONDE**

For its 25<sup>th</sup> birthday, TV5MONDE opened its new recording studio. Updated, modular and equipped for new technologies, the studio projects the channel's visual identity.

This opening coincided with the adoption of the 16:9 aspect ratio for TV5MONDE broadcasts to France-Belgium-Switzerland, North Africa-Middle East and Pacific. The other regions will gradually adopt 16:9.

David Delos - © TV5MONDE





## Promoting solidarity and French culture via the audiovisual media

In addition to the Ministry of Foreign and European Affairs' participation in the strategic policies of the AEF system, it also has the major task of overseeing operators:

- **CulturesFrance**, whose film department is now responsible for non-commercial distribution of films and documentaries;

- **Canal France International (CFI)**, in charge of cooperation with countries in the global South.

The Ministry also belongs to the various commissions and boards of professional bodies such as TVFI and UNIFRANCE. To carry out these missions, the Ministry benefits from a network unequalled in the world, with some fifty **audiovisual media attachés** in French embassies.

## INA, EXTENDING ITS INFLUENCE

In addition to the Ministry of Foreign and European Affairs, other stakeholders are involved in France's external audiovisual policy, particularly the Institut national de l'audiovisuel (INA).

INA is a world leader in digital archiving and a reference for innovation in this area. Its know-how is recognised throughout the world. INA has worked in over 60 countries.

INA is frequently called upon for expert missions (Algeria, Vietnam, etc.), provides courses at major universities in North America, Europe and China, is present at cultural events and, not least, contributes to the preservation of the world's audiovisual heritage (working with the Cambodian documentary film director Rithy Panh).

It is an active member of the Permanent Conference of Mediterranean Audiovisual Operators (COPEAM), which it currently chairs, and has produced the first global database of digitised archives – [www.inamedia.com](http://www.inamedia.com) – with an English version available.



The INA archives - © INA

### **Development cooperation to provide our know-how and training for developing countries**

Canal France International's mission is to train and structure audiovisual operators: in 2008, CFI supplied 4,700 programmes to its 150 partner television operators, supported 28 African productions, carried out 112 expert missions and training courses on the ground and supported the modernisation of 75 television channels.

The Ministry also directly finances some projects, either from central allocations or budget lines, or from a priority solidarity fund (FSP) of €2.8 million: professional training for broadcasting and film sectors in the South, democratisation of media systems, the Radio Afrique and Images Archives plans.

Its flagship project is the Fonds Sud mechanism, jointly funded by CNC, for films that regularly go on to win prestigious prizes. (400 films from 70 countries supported in 25 years.)

### **Cooperation with developed and emerging countries**

Cooperation with developed and emerging countries takes the form of support for professional associations (UNIFRANCE for films, TVFI for television and the Bureau export de la musique française) whose sales are mainly in North America and Europe.

UNIFRANCE directs some of its action towards highly promising new markets in such countries as Kazakhstan, South Africa and Vietnam.



Lucas Menget in the Field, in Baghdad (Iraq) © France 24

### **AUDIOVISUAL MEDIA ATTACHÉS, A UNIQUE RESOURCE**

The network of audiovisual media attachés, some 50 throughout the world, was set up in 1984 to be the "advance guard" of France's external action in this field, and their mission may be summarised as four major functions of varying importance from one region or country to another:

- **business intelligence:** market developments and opportunities for entry for French production and media;
- **commercial promotion** of French companies and programmes (television, radio, cinema, records,

multimedia) with local institutions and companies: support for export prospection (contacts, logistics, etc.), monitoring the local presence of French channels (television, radio) and organising action to raise their visibility;

- **organisation of specific operations** (pre-release premieres, etc.) in close cooperation with professionals (exporters, distributors and local operators, professional bodies such as Unifrance, TVFI, the Bureau export de la musique française, etc.);
- **cooperation projects** that contribute to structuring the audiovisual sector and developing local capacities for production and distribution, together with CFI, RFI or INA.





In films, France, with the Centre national du cinéma et de l'image animée (CNC), is the European country that has signed the largest number of co-production agreements (54), mostly with other European countries (with the result that France funds a not insignificant proportion of European films), and five with Canada alone (each in a different field).

The agreements provide for artistic, technical and financial participation on an 80/20 basis (the minority co-producer's contribution cannot be less than 20% of the film's production cost) and are generally for a renewable period of two years. In television, outside contributions to mainly French co-productions are tending to decline.

### Coherent regulation of the audiovisual sector

The aim is to achieve coherence between international legal developments in the audiovisual sector and the principles that France defends both at home and in our strategy of international influence and solidarity.

Audiovisual regulation must adapt to the changes resulting from convergence between traditional and new media. The issues involved are many and various:

- rules for linear and non-linear audiovisual media services, however distributed;
- rules for audiovisual commercial communications;



A young supporter in the South African colours - © bilderquelle - Fotolia

### CFI HEADING FOR THE 2010 WORLD CUP

In June 2010, the 19th FIFA World Cup will be held in South Africa, the first time on that continent. Football features daily on the world's screens and this summer will be particularly important for the African television operators that CFI has worked with over 25 years.

Thanks to French development cooperation, CFI and an exclusive partnership with FIFA and the African Union of Broadcasting, viewers in forty-odd countries will receive the 64 matches of the competition with commentaries in French, English and Portuguese from African journalists chosen after a long process of selection and training.

France has a double presence, therefore, in South Africa, with its national squad and its support for the best commentators on the continent, helping them to make this historic event their own and extend the exploits of their countries' teams.

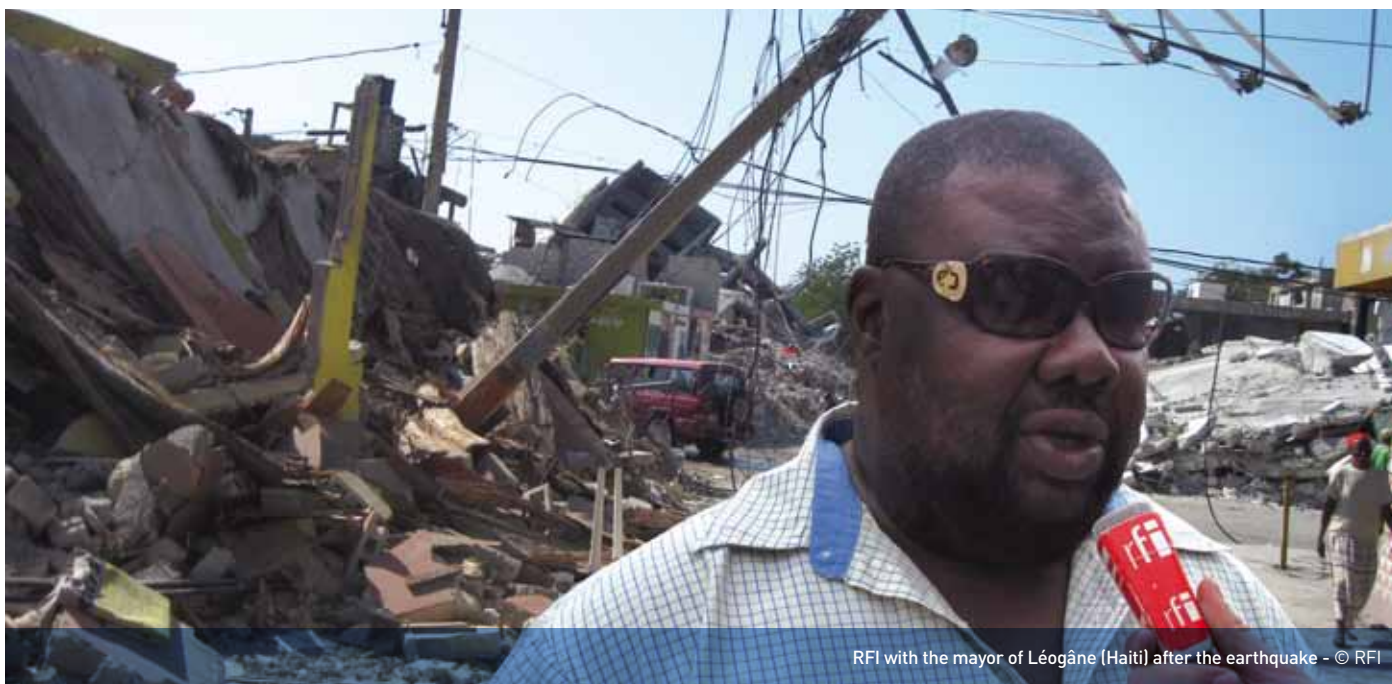
In this way CFI is strengthening its network of partners in Africa in a motivating high-visibility operation, fulfilling its mission of transferring skills to the continent's main operators.

- measures to promote cultural diversity, protection of minors, access for the disabled;
- rules to protect the rights of broadcasting bodies and others.

These matters are addressed within the European Union and in such varied bodies as the Council of Europe, UNESCO and WIPO.

France also supports African regulatory authority networks (RIARC and REFRAM) and the missions sent by cultural services to invite CSA (Conseil supérieur de l'audiovisuel) representatives abroad to promote the French regulatory system.

France is often a pioneer and this country is frequently requested by its foreign partners to examine new issues such as piracy control, the development of legal digital products and the digitisation of cinemas.



## APPROACH TO THE MEDIA IN THE EUROPEAN UNION'S COMMERCIAL AND ECONOMIC NEGOTIATIONS

The Unesco Convention on the Protection and Promotion of the Diversity of Cultural Expressions, which came into force in 2007, recognises the special nature of cultural goods and services, in particular audiovisual ones, and the possibility for States to design and implement national cultural policies of support.

Now that there is an international instrument to advance the French and European idea that culture is not a commodity like any other, it is important to

ensure that this Convention is properly included in international trade commitments.

A proposal for a European strategy in this field has been made by a French interministerial working group including professionals from the sector.

The Protocols on Cultural Cooperation (PCCs) that the European Commission negotiates as part of its trade and economic agreements with third countries must not lead to a liberalisation of the cultural and audiovisual sector, but rather act as effective tools to promote cultural diversity and establish the bases for a European cultural policy with our partners.



## **CULTURESFRANCE: BECOMING AN AGENCY TO SERVE FRANCE'S EXTERNAL CULTURAL POLICY**

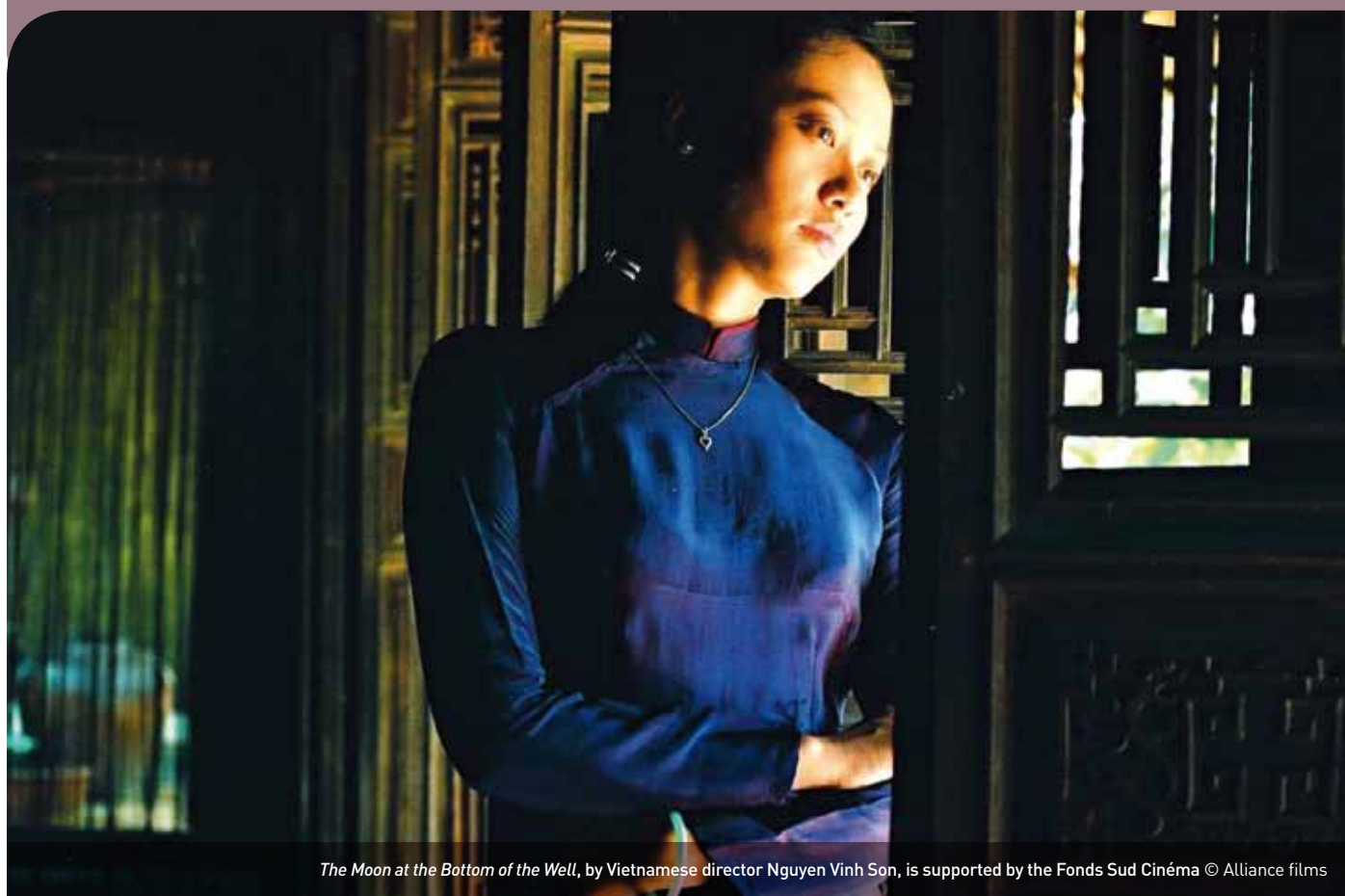
The Film Directorate of CulturesFrance is the Ministry of Foreign and European Affairs' instrument for distributing contemporary and heritage French films throughout the world.

More than 3,000 feature films and 2,000 documentaries are available in film, video and on-line for the French cultural network (cultural institutes and centres, Alliance française) and local partners (festivals, film clubs, museums, universities, etc.).

To promote international cultural exchange, CulturesFrance proposes film retrospectives with the presence of actors or directors (Isabelle Huppert, Juliette Binoche, etc.), takes part in cultural seasons (France-Russia, Bonjour India, etc.) and offers a selection of foreign films produced with help from the Fonds Sud.

The Cinémathèque Afrique possesses a unique collection of films produced in Africa by African directors over more than fifty years.

At the Cannes Festival, CulturesFrance has a Cinémas du Monde Pavilion hosting film professionals from all over the world and holding lectures and debates. This year the Pavilion is sponsored by Sandrine Bonnaire and the Cambodian director Rithy Panh.



*The Moon at the Bottom of the Well*, by Vietnamese director Nguyen Vinh Son, is supported by the Fonds Sud Cinéma © Alliance films



DGM/Cultural and French Language Policy Directorate  
Media, Cinema and Communication Technologies Department



**Jean-Christophe Fleury,**  
*Deputy Director for Media,  
Cinema and Communication  
Technologies Department*



**Delphine Borione,**  
*Director for Cultural  
and the French  
language policy*

## The Ministry of Foreign and European Affairs and the Directorate General of Global Affairs, Development and Partnerships

The missions of the French Ministry of Foreign and European Affairs are:

- summarize information on the changing global economy and put it into perspective, prepare decisions on the French government's foreign policy,
- draft France's foreign policy,
- coordinate France's international relations,
- protect French interests abroad and assist French nationals outside France.

The creation of the Directorate General of Global Affairs, Development and Partnerships (DGM) in April 2009, as part of the reform of the Ministry, enables diplomacy to anticipate, identify and respond to the challenges of globalisation more effectively.

Confronted with global issues that have a direct impact on the lives of our citizens and multiple actors, the Ministry intends, through the DGM, to emphasise the need to tackle global issues, in the firm belief that every major economic, cultural and societal issue calls for collective action with more outward focus, anticipation, interministerial coordination, responsiveness, interdisciplinarity and a resolutely European approach.



Ministry of Foreign and European Affairs  
Directorate General of Global Affairs, Development and Partnerships

27 rue de la Convention  
CS 91533 - 75732 Paris Cedex 15

[www.diplomatie.gouv.fr](http://www.diplomatie.gouv.fr)



Brochure printed on PEFC-ecologically responsible paper