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AUDIOVISUAL SECTOR IN QUEBEC, CANADA: CHALLENGES AND PERSPECTIVES OF THE FILM AND TELEVISION INDUSTRIES ON SOCIAL COHESION

The audiovisual sector is currently undergoing a period of radical change that is causing a structural crisis, exacerbated by the globally negative economic situation. However, in this environment full of uncertainties, the audiovisual industry is perceived and consolidated as an activity with high growth potential and is still considered one of the models with fundamental drivers of the new economy.

The audiovisual production in Canada is experiencing a period of transformation, of redefinition. And this is not just as a result of the ongoing technological revolution, but at the same time as a consequence of the inherent economic and financial circumstances, to demographic changes across the country, and above all, changes in tastes and consumption habits of the population.

As for the provincial level, particularly the province of Quebec, a society of 8 million people approximately, the results of the Cultural Policy of Quebec of 1992: “Our Culture, our future”, regarding the industries of film and television, have been positive not only for the same industries, but at the same time it has allowed all sectors of the Québec society to participate more actively in various cultural programs and thus providing a more evident integration. It has strengthened democracy, freedom of expression and maintained the traditions and cultures of aboriginal communities.

STATUTORY DECLARATION

I assure:

1. That I have drafted the thesis independently, did not use other than the indicated sources and tools and did not make use of any other illegitimate help either;
2. That I have so far not submitted the thesis to an assayer in-country or abroad as an examination paper for assessment in any form.

Vienna, 16.01.2015

Edgar Andrés López Rosero

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ZUSSAMENFASSUNG

Der audiovisuelle Sektor ist derzeit in einer Phase des Umbruchs, die zu einer strukturellen Krise führt, die dazu noch von der negativen Wirtschaftslage weltweit noch mehr verschärft wird. Allerdings, trotz der trüben Lage und des düsteren Zusammenhanges, wird die audiovisuelle Industrie als eine Aktivität mit hohem Wachstumspotenzial betrachtet und wird immer noch als eines der Modelle mit fundamentalen Treiber der neuen Wirtschaft gesehen.

Die audiovisuellen Produktion in Kanada ist in einer Phase der Transformation, der Neudefinition. Und das ist nicht nur als Folge der anhaltenden technologischen Revolution, sondern auch als Folge der inhärenten wirtschaftlichen und finanziellen Umstände, des demografischen Wandel im ganzen Land, und vor allem, als Folge der Veränderungen im Geschmack und Konsumgewohnheiten der Bevölkerung .

Im Bezug auf die Landesebene, insbesondere der Provinz Quebec, deren Gesellschaft etwa 8 Millionen Menschen zählt, die Ergebnisse der Kulturpolitik von Quebec von 1992: "Unsere Kultur, unsere Zukunft", in Bezugählt, auf die Branchen Film und Fernsehen, sind positiv nicht nur für diese zwei Branchen, sondern auch gleichzeitig hat es alle Sektoren der Gesellschaft von Québec erlaubt aktiver und stärker zu sein am vielfältigen Kulturprogramm. Es hat die Demokratie und die Meinungsfreiheit gestärkt, und die Traditionen und Kulturen der indigenen Gemeinschaften gehalten.

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INTRODUCTION

Canada is a diverse society with 34.7 million people (UN, 2012)¹, which is about half the size of Great Britain and France, the two nations whose colonization projects strongly shaped Canada's development. Politically organized as a federation, Canada is a complex society whose components are provinces with a great autonomy, regions with different resources, a diverse population that include many ethnic groups, two official languages, and fifty-seven aboriginal nations with their own national identities. As the country's population has gone through remarkable and continuous transformations, its social cohesion has been deeply marked and has posed challenges from one epoch to another.

The relevance of social cohesion has been widely analyzed by a great number of scholars which indicate certain characteristics like *"a cohesive society is one in which members share values, principles and moral codes that allow them to identify common objectives and guide their social relation"*, (Kearns² y Forrest³, 2000); *"social cohesion involves reducing disparities in income distribution"*(Maxwell, 1998); or *"that social cohesion is a process in which a community develops common values and goals, where they are oriented to the promotion of equal opportunities"*, (Jeannotte, 2000).

But of course, social cohesion has never been easy for any society. In fact, as British philosopher Bertrand Russell describes it: *"Every community is exposed to two opposite dangers: ossification through too much discipline and reverence for tradition, on the one hand; and on the other hand, dissolution, or subjection to foreign conquest, through the growth of individualism and personal experience that makes cooperation impossible"* (Power, 1938).

¹ BBC.COM. <http://www.bbc.com/news/world-us-canada-16841114>. Seen on 15/05/2014.

² School for Policy Studies, University of Bristol, 8 Priory Road, Bristol, UK

³ Forrest and Kearns also identify a society with a lack of social cohesion as one with displayed social disorder and conflict, disparate moral values, extreme social inequality, low levels of social interaction between and within communities and low levels of place attachment.

In that order of ideas, Canada's social cohesion has become a concept that helps identify the relationships between economic and social aspects of development, and procedures to facilitate goal setting (Jenson, 1998). And for this seminar, I would like to develop an analysis of the factors that threaten or strengthen social cohesion in Canada, and the policies needed to secure it in a very specific area where the country has played a major role worldwide: Audiovisual, which makes part of the entertainment industry and has some of the biggest developments since its emergence in the nineteenth century.

This research comes at the right time, first and foremost, because we find ourselves at a point where the technological transition closes an era, the analog one, and opens a new one, digital one⁴. And we are also talking about a time of so many radical changes and uncertainties for the audiovisual sector, as it has been arguably exacerbated by the current economic crisis.

And there is a current stage of transformation of the audiovisual sector in Canada, particularly in the province of Quebec, that has been, on one hand, influenced by the technological revolution, but on the other hand, by changes in tastes and consumption habits of the population. It is for this reason that it is considered a strategic sector and one of the key drivers of the new economy.

Never before had it been consumed so many audiovisual contents. And demand is growing faster and wider every time as a result of new windows of exhibition and distribution. Therefore content, along with many other derivatives of these services are essential to strengthen the so-called digital society. This is the reason why this study could not have come at a better timing.

Audiovisual production industry in the province of Quebec has shown to have a lot of potential thanks to its diversity and quality, and it is considered as one of the most solid and consolidated ones around the world (Acheson & Maule, 2003). But in order to see a sustainable progress it is necessary to establish a way where we can make way for a more stable and continuous production of audiovisual content.

⁴ The difference between analog and digital technologies is that in analog technology, information is translated into electric pulses of varying amplitude. In digital technology, translation of information is into binary format (zero or one) where each bit is representative of two distinct amplitudes.

This is why a public policy regarding the audiovisual industry as a whole was created in 1992, called “Our culture our future”. This policy has no boundaries of background, origin or opinions; and is addressed universally to those who make part of this industry (this paper is exclusively focused on the film and the television fields) within the French speaking province of Quebec, as well as those who are devoted, have a passion for it or simply enjoy it as a hobby.

OBJECTIVES

For the general objective of this seminar I will investigate and analyze the birth of the cluster policy in the audiovisual sector in Canada, particularly in the province of Quebec, and discuss the challenges and difficulties in developing cooperation between businesses of a competitive creative sector, highlighting the fact that geographic or physical proximity is not enough and that relational proximity is not so easy to develop.

As for specific objectives, I will focus exclusively on the film and television industries, since as it will be explained throughout this paper, Canada has one of the most consolidated industries that not only represent development and progress for the audiovisual sector as a whole, but at the same time it allows all sectors of a very diverse society to take part in different activities and projects that nurture and enrich civil participation, democracy and freedom of expression .

I will also detect possible trends of the audiovisual industry not only in the province of Quebec, but equally at the federal level, in terms of the evolution of the field, for instance technological convergence, sources and conditions of employment and training needs. Similarly and equally important, I will analyze the training offer of the province in the audiovisual field.

And last but not least, I will determine what kind of economic impacts (from integration into labor market to cooperation among other industries involved), and social results (participation by all sectors of civil society, if possible) of the new strategies and policy amendments that are currently in practice, assessing whether their results are consistent with the philosophy of social cohesion.

JUSTIFICATION

"A socially cohesive community - regardless of scale: local, regional, national, is a global situation where citizens share a sense of belonging and inclusion, are active in public affairs, recognize and tolerate differences, and enjoy relative equality in access to public goods and services in terms of the distribution of income and wealth. All this in an environment where institutions generate trust and legitimacy and citizenship is exercised correctly "

OCO 2010:25

The relevance of this project lies on the importance to understand how a country like Canada, specifically the province of Quebec, has become a diverse and pluralistic society exposed to highly competitive, global markets (Filion, 1996). And one of the many challenges of social cohesion comes from the growing role of markets in our lives. Of course, competition offers opportunity of great rewards, but also risks of unemployment and insecurity.

And I will show that these possibilities, unfortunately, have increased income inequality and created social distances within communities. If we see a city like Montreal for example, it has seen increasing concentration of poverty in certain neighbourhoods, where many young men do not work, and where high school drop out rates are still remarkably high (Filion, 1996). They may only live a kilometre away from privileged families where a high percentage of the young people are headed for universities and good jobs. Such contrasts, if not addressed, pose a real threat to social cohesion.

As to the relevance of the audiovisual sector at present, it stems from multiple reasons: It is a growing factor of economic activity, it is an influence on the dynamics in other settings, such as computer or telecommunications; helps promote domestic goods and services across borders, has significant capacity to generate employment, promotes community

identity, and has a huge potential as a cultural, educational and social dynamic element (Marti & Muñoz Yebra, 2001).

As it is indicated by Professor Javier Marzal Felici, from Jaume I University: *"Audiovisual production is an ambiguous reality as we are talking about a sector that can be considered art, industry and, at the same time, business since without public there is no chance of survival for anyone who manufactured the product. Thus, the figure of the producer moves between the ambivalence of his simultaneous consideration as an artist and as a businessman."* (Congreso de Comunicación Local, 2013).

This gives the audiovisual sector an important strategic dimension, for example, for public administrations that are, to this point, trying to apply a task that is not always easy mainly because, when speaking of complicated economic dynamics, when managing and organizing, production activity and objects differ largely from the generality of the goods and services market.

METHODOLOGY

The documentary analysis of this study is mainly based on the collection and processing of information on the evolution of the Cultural Policy of Quebec, from the time of its creation in 1992 until 2002, focusing exclusively on how the cinema and television industries have allowed many sectors of the local society to participate in different cultural activities, strengthening democracy and social cohesion.

The study consists basically of a desk research of different kind of data, like statistics, reviews, editorials, surveys and case of studies, from official and local institutions, and from international organizations as well. At the same time, I conducted an evaluation and analysis of a series of similar public policies that address the topic of the audiovisual sector in Quebec.

Moreover, this research takes prospective studies into account, from scholars, academics and Quebec institutions that have elaborated and conducted deep research on this topic. I also use relevant references like the cinema and television industries in other countries and regions that are key of their development and somehow comparable to the situation in the province of Quebec.

As for the theoretical part, this work includes a consistent literature review which investigates and analyses certain definitions of conceptual terms that are crucial this thesis, like social cohesion and social capital. The methodology of this literature review consists of internet database research and cross-referencing of influential works on the different topics concerning the topics of this study.

Thus, I have analyzed in detail documents of primarily Canadian sources in order to obtain reliable, relevant, comprehensive and most updated data. It has also appealed to organizations of the institutional framework and the management, professional, business

and labor associations, and also the educational world, in all cases, both the state and the autonomic sphere.

I have consulted different kinds of national and regional statistics, data from national and autonomic production companies, training centers, specialized communication media, clusters and foundations for audiovisual development. This, in order to facilitate the economic and business analysis of the sector (structure, evolution and trends mostly), to identify the characteristics of the occupation (above all, professional profiles and employment size) and to describe the landscape of university education.

RESEARCH QUESTIONS

1. What is the relation of the audiovisual industry, particularly the television and film sectors, with the idea of social cohesion?
2. To what extend is the Cultural Policy of the Province of Quebec of 1992, “Our culture, our future” aimed to promote and stablish a more solid participation of all sectors of its civil society?
3. What is the long term of social, economic and cultural impact of this policy not only on the Quebec society but as well on the national society?

CHAPTER ONE

THEORETICAL FRAMEWORK

“Social cohesion is an ongoing process of developing a community of shared values, shared challenges and equal opportunities within Canada, based on a sense of trust, hope and reciprocity among all Canadians.”

Interdepartmental Policy Research Subcommittee on Social Cohesion⁵.

Social cohesion is a key element in a world of democracy, as well as an academic concept which refers to diverse aspects of the dynamics of social relations, such as social exclusion, participation and belonging. For Bernard (1999, p. 65) it is a “quasi-concept, that is, one of those hybrid mental constructions that politics proposes to us more and more often in order to simultaneously detect possible consensuses on a reading of reality, and to forge them”.

There are also many dictionary definitions that place “cohesion” as the action or fact of holding firmly together or forming a unit. It refers to a state in which components „stick” together to form a meaningful whole (Chan et al., 2006, p. 289).

Furthermore, several attempts at defining and operationalising social cohesion have been made and resulted in a multiplicity of understandings, all of them stressing its multidimensionality (Jenson, 1998, Berger-Schmitt, 2000, Fainstein, 2001, Kearns and Forrest, 2000, Maloutas and Malouta, 2004, Woolley, 1998, O'Connor, 1998).

In general, scholars consider a cohesive society a goal or at least a general direction in which society should evolve, and often include the means by which it may be achieved (Berger-Schmitt, 2000, p. 4).

⁵ The Government of Canada created a Interdepartmental Policy Research Subcommittee on Social Cohesion which included more than 20 departments and agencies. It created as well the Social Cohesion Research Workplan with its very own definition of social cohesion including multiple values and beliefs that are necessary to achieve cohesion in a society.

1. 1 Bertrand, R. A History of Western Philosophy. Simons & Schuster/Touchstone. October 30, 1967.

This book is a perfect introduction to the various schools of thought that have occurred in Europe. Among the virtues of Russell's work, the reader can find an easy prose as well as facilitate understanding of the thinking of various philosophers through good metaphors. In turn, the author introduces whole chapters devoted to explaining the historical events that influence different philosophical currents. For example, the article on the Hellenistic world is a perfect explanation of mutual influence in the Greek and Oriental thought.

This text should be understood as a description of the philosophical history with personal opinions of the author. Russell, a mathematician and logical positivist, has a predilection for thinkers whose works are more suited to his own thinking and makes as well reviews of metaphysical thinkers.

The reason why this text is important for this project is because the autor, apart from being a mathematician, he was a man deeply committed to pacifism, freedom, liberation of women and other social problems, which are issues addressed by the concept of social cohesion. This is significantly seen in both the criticism of the state model proposed by Plato and Saint Augustin's disturbing obsession with sin.

1.2 Maxwell, J. (1996). Social Dimensions of Economic Growth: Eric J. Hansen Memorial Lecture, 25 January, University of Alberta.

Judith Maxwell⁶ understands social cohesion as “building shared values and communities of interpretation, reducing disparities in wealth and income, and generally enabling people to have a sense that they are engaged in a common enterprise, facing shared challenges, and that they are members of the same community”

⁶ Judith Maxwell is a widely recognized and highly regarded commentator and analyst of Canadian social and economic issues. From 1985 to 1992, she made an imprint on Canadian public policy as Chair of the Economic Council of Canada. Prior to her service at the Council, Ms. Maxwell was a journalist with the Financial Times, Director of Policy Studies at the C.D. Howe Institute and a consultant

Furthermore, Maxwell's all-encompassing definition is still often cited today. It identified the crucial areas for social policy intervention, such as the need for creating shared values and common goals and combating inequality.

To the author, the coincidence of inequality and diversity has undoubtedly created complications to the challenge of social cohesion. The diversity of the Canadian people greatly enriches their lives, but at the same time it also introduces different value systems, more languages, and different ethnic and religious traditions⁷. Even second and third generation minority groups are still treated as strangers. She indicates that it is obviously wonderful to see how many people prosper in Canada, but there are also many that are stuck in the poor neighbourhoods where their economic and social prospects are severely limited.

Furthermore, Maxwell states that in this context of competition, diversity, and greater inequality, people yearn for a sense of belonging and common purpose to anchor their lives and to define their identity. They are looking for respect and reciprocity in workplaces, schools, community spaces, and political institutions.

She concludes that most successful societies, going forward, will be those that create those social connections and foster a sense of mutual responsibility, even as they strive to compete head on with the industrial might of the global economy.

⁷ Officially, Canada became a multicultural society back in 1971 when the government started to recognize the value and dignity of Canadians of all races and ethnic groups, all languages and all religions. At the same time, the government recognized the value and dignity of Aboriginal peoples and the equal status of Canada's two official languages: French and English.

SECOND CHAPTER

THE AUDIOVISUAL SECTOR AS AN EFFECTIVE AND GLOBAL STRATEGY OF DEVELOPMENT

“Audiovisual services contribute to intercultural dialogue, which is the basis for a lasting peace and sustainable human development “.

*UNCTAD, the United Nations Conference on Trade and Development.*⁸

The audiovisual sector, member of the leisure and entertainment industry, is one of the sectors that has had the largest and most rapid development since its emergence in the nineteenth century (Martinez Abadía, 1997). The continuing presence of new technologies, like new tastes, habits and preferences of viewers, have resulted in the emergence of new formats, genres and media tailored to consumer demand. Now in the XXI century, we face a consumer that is more demanding, who requires, on the one hand, services or products with certain characteristics; and on the other, leisure time in which he can enjoy those goods or services.

The cinema is no longer the audiovisual product *par excellence* or perhaps the best known, breaking through to the other and equally competitive components of this sector, such as television or multimedia world, with great power of diffusion in the twenty-first century. Therefore, this research aims to examine the role that this sector has played since its introduction to the current trends.

This is a sector with great weight in the current economy, and not only by itself and the growing demand that it has aroused and continues to arouse, but also for its high and direct

⁸ UNCTAD, the United Nations Conference on Trade and Development, is the principal organ of the United Nations General Assembly dealing with trade, investment, and development issues. The organization's goals are to maximize the trade, investment and development opportunities of developing countries and assist them in their efforts to integrate into the world economy on an equitable basis.

The primary objective of UNCTAD is to formulate policies regarding all aspects of development including trade, aid, transport, finance and technology. The conference meets once in four years and the permanent secretariat is located in Geneva, Switzerland.

links with other sectors such as the technologies, computers sciences or telecommunications whose expansion encourages the development of these sectors, and vice versa, getting to achieve significant synergies (Martí & Muñoz, 2001: 124).

2. 1 Conceptual structure of the audiovisual sector

Technically speaking, there has been many authors that through different kind of studies consider that audiovisual can be conceived and understood as the use of images and / or audio, specifically, "the inclusion of still images such as paintings and photographs, moving images such as film, television and video; and sound recordings music, voice or other sounds, or as a component of moving image documents." (Turner, 2010: 84)⁹. Moreover, the audiovisual sector is "the patchwork of markets characterized by direct or indirect participation in the provision and simultaneous reception of sound and moving images" (Martí and Muñoz, 2001: 126).

At the institutional level, the European Commission has also ruled on the matter indicating that the audiovisual sector is one that is dedicated to the "production and distribution of motion pictures, radio and television activities, and recording studios" (European Commission, chap 27, 1993).

The definition of the audiovisual sector to be used in this work is defined by the categories listed in the Services Sectorial Classification list prepared by the World Trade Organization (WTO)¹⁰. This definition has at least the advantage of being accepted as part of the broader international agreement (subject coverage and number of parties) based on the sector. Audiovisual services are listed as section D of Section 2 of the list, dedicated to Communications Services.

⁹ Brad Turner holds a degree in Economics from the University of Virginia and a Masters in marketing and finance from the Kellogg School of Management at Northwestern University.

¹⁰ It is important to remember that the World Trade Organization (WTO) has as a main function, to deal with the global rules of trade between nations. The organization must ensure that trade flows as smoothly, predictably and freely as possible.

Within audiovisual services, we find 6 subcategories with corresponding numeric codes that are relevant to the Provisional Central Classification of United Nations: Production services and distribution of film and video tape (CPC 9611), motion picture projection services (CPC 9612), radio and television (CPC 9613), transmission of sound and images (CPC 7524), recording sound and others. The sum of all these subcategories set concept of "Audiovisual sector" under the GATT¹¹.

Negotiations on the audiovisual sector can vary from region to region, country to country, depending on each part's interests, for instance, between Europe and the United States, negotiations date back to 1993, when they reached an agreement after several rounds of discussion, carried out by the GATT. Today, the European Commission has become aware of the importance of the audiovisual sector in the development of democracy, freedom of expression, technological innovation and cultural diversity (Perry, 2003).

2.2 Evolution and International Context

Since the late 1980s, the audiovisual sector has entered an era of swing, reason why this has been of considerable interest by experts in this matter, since it has become a service consumed by millions of people worldwide. In the 1960s, the United States began attempts to import programs and / or European films, but Europe itself presented a negative reaction to it and was not willing to make such concessions (de Witte¹², 2001: 242). It took over 20 years for the European Union was aware that the liberalization of all service sectors -within we include the audiovisual-, benefit its economy (Pauwels and Loisen, 2003: 293).

¹¹ General Agreement on Tariffs and Trade. It was a multilateral agreement regulating international trade whose main purpose was the "substantial reduction of tariffs and other trade barriers and the elimination of preferences, on a reciprocal and mutually advantageous basis." GATT was signed by 23 nations in Geneva on October 30, 1947 and took effect on January 1, 1948. It lasted until the signature by 123 nations in Marrakesh on April 14, 1994 of the Uruguay Round Agreements, which established the World Trade Organization (WTO) on January 1, 1995

¹² Bruno de Witte is a Belgian legal scholar that currently works as Professor of European Union law at Maastricht University, co-director of the Maastricht Centre for European Law, and as part-time Professor at the Robert Schuman Centre of the European University Institute (EUI) in Florence.

Negotiations on the audiovisual sector between Europe and the United States were the subject of discussion, until in 1993 came to an end after several rounds, conducted by the GATT, reaching currently the European Commission to be aware of the importance of the audiovisual sector with respect to the development of democracy, freedom of expression, technological innovation and cultural variety (Perry, 2003)

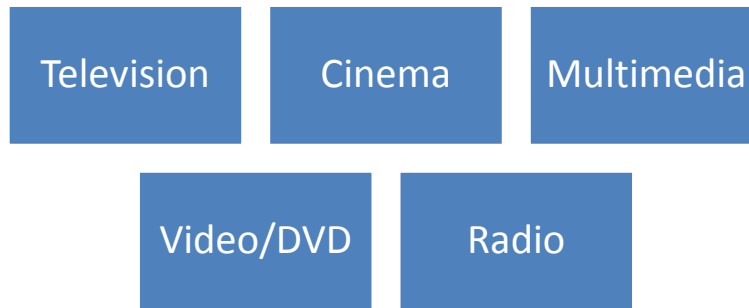
In the 1990s, the audiovisual sector basically consisted of grouping four subsectors: television, music recordings, videotapes and film. In 1994 television accounted for 43% of audiovisual consumption, followed by recordings (27%), videotapes (21%) and film (9%) (European Commission, 1997).

2.4 Subsectors of the audiovisual sector

Since the 1990s several authors have continued to work on the definition of these terms, including modifications made to suit the current situation. We can therefore conclude that today, the audiovisual sector is "the patchwork of markets characterized by participating directly or indirectly in the provision and simultaneous reception of sound and moving images "(Martí and Muñoz, 2001: 126)

Graphic N.1

Subsectors of the audiovisual sector



Source: Compiled from Martí and Muñoz (2001)

2.3.1 Cine

As it has been shown so far, the film industry has been the pioneer in the audiovisual sector, and therefore, it is the one that has a more consistent path. Its importance and relevance transcends beyond its age, as it is also one of the biggest exponents of this lucrative sector.

Cinema is understood today in a dual way: on one side, it is considered as one of the most important arts of humanity, and on the other, especially American cinema, as cornerstone of one of the largest industries worldwide. Thus, the cinema becomes a phenomenon of great relevance to today's society and its reach extends not only to the limits of Western society but it is present in all corners of the planet with greater or lesser degree.

Origins

The cinema emerged in the late nineteenth century and early twentieth centuries with the earliest formats¹³. Its idea is based on the projection of still images continuously and at high

¹³ The history of cinema as spectacle began in Paris on December 28, 1895. Since then, it has undergone a series of changes in several ways. On one hand, cinema technology has evolved greatly since the early silent films of the Lumière brothers, to the digital cinema of the 21st century. On the other hand, cinematic language has also evolved, including the conventions of the genre, creating film genres. Thirdly, it has evolved with society, giving rise to various cinematic movements and national cinemas.

speed so that images can appear moving. This idea is also based on what we know today as cinematography and it will not be until the first decades of the twentieth century that the cinema will not start getting the shape closer to the current form.

The cinema is an expressive medium of high impact and this is so because it can be combined within itself many arts: drama, music, staging, photography and literature. It needs not only the work of actors and performers but also directors, screenwriters, producers, props, technical equipment, etc. Thus, it is a complex phenomenon that can result in very different artistic styles but very representative simultaneously.

Today, the phenomenon of cinema is also an economic one and not just artistic. This is because of the importance that the Hollywood film industry, in the city of Los Angeles, in the United States, has developed. This focal point of the film industry is where most of the productions are taken place and which also houses many of the most important film producers on the planet¹⁴. It is also considered that, with the weapon industry, the film industry is one of those that more capital moves around the planet, thus meaning major interests of all kinds.

Nevertheless, certain changes that have occurred inside the film industry have been turbulent and constant, mostly because it is a sector in which new formats, technologies, genres and / or styles have appeared simultaneously, and that the level of integration in society has increased. Within these many changes, it is possible to make allusion to the following (Alvarez, 2008):

- A) Globalization and internationalization of media groups, looking for strategies to control future media markets and taking advantage of simultaneous mode fending Internet.
- B) Competition between groups / organizations for control of international distribution.
- C) Changes and rupture in the traditional value chain of the film industry, because there are new consumer devices and distribution strategies, some of them free (the case of the Internet and social networks).

¹⁴ In the US, the cinema had great success thanks to a peculiar social circumstance: being a country of immigrants, many of whom did not speak English, both theater and the press and the books were closed to them by the language barrier, and so silent film became a major source of entertainment for them.

D) Decrease consumption cycle films, whose amortization should be faster, as it is their exploitation.

E) Appearance of associated producers.

Challenges of current global cinema in respect with the audiovisual industry

As time has gone by, technology has become less expensive, making it more affordable and accessible to produce new movies. However, as the independent film world is constantly dealing with low budgets (which is actually something positive because it democratizes the landscape), marketing budgets have to be increased in order to deal with the massive saturation of films and to really stand apart.

Moreover, and following the line of democratization of the industry, it is vital to keep or improve the level of concurrence. By doing so, it would be easier to contribute to the internationalization of talent and the simultaneous world premieres supported by international marketing and distribution. Thus, this rivalry would go from being a dirty competition to a necessary cooperation.

Some Hollywood and also Bollywood experts on the subject of the audiovisual sector indicate that the current main focus when it comes to producing a product of audiovisual character is not only about making movies but products with multiple financial applications (Raja, 2012).¹⁵ Usually, what it is now thought is the new way to do business and achieve the best economic results.

But outside of that new commercial look, it is true that in the aspect of the protagonists, things have not changed much; the reason: only the most powerful can star in this game and in fact, for example, only about five companies - integrated into business environments that are dedicated, among other things, the audiovisual production- monopolize the market of global film production, leading, as authors, most of the titles that dominate the box office.

¹⁵ The biggest difference between these two concepts is that Hollywood is a physical place in Los Angeles, California, USA., whereas Bollywood is an informal term that is used to represent the Hindi-language film industry in India. It is just a fraction of Indian cinema and is not a physical place, but rather a representative term for popular Hindi films.

Their names are widely recognized by everyone and they have built a lasting empire of their own: Disney, Columbia-Sony, Paramount, Time Warner or Universal. These are companies mainly devoted to the film industry, but in the background, move easily in the field of large media conglomerates with diversified businesses, allowing them to have the resources to dominate the sector.

2.3.2 Television

Television has ceased to be unique to each home and viewed on group, to become seen individually in different rooms, depending on the programs according to the tastes of different individuals household (Bjur, 2010). In 1999 still 45% of the viewers saw television in group, but in 2008 this had dropped to 37%.

Origins

Television was not invented by the genius of only one person; it is the result of many discoveries by many people in a variety of fields such as electricity, electromagnetism and electrochemistry. The basic principles were already known during the nineteenth century; however, the practical realization would occur when the electron tube was discovered in the 20s.

The scientific and technical process that began in 1817 with the discovery of the properties of selenium (element whose electrical conductivity increases with light received) by the Swedish chemist Jacob Berzelius, and finished with the experiences of American engineer of Russian origin Vladimir Kosma Zworykin, British Logie Baird and German Paul Nipkow, resulted in the emergence of television sets on the market.¹⁶

¹⁶ In 1884 Paul Nipkow designed and patented the Nipkow disk, a television project. In 1910, the Nipkow disk was used in the development of television systems of the early twentieth century and in 1925, March 25th, Scottish inventor John Logie Baird made the first real experience using two discs, one in the emitter and the other in the receiver, which were attached to the same axis so rotation could be synchronous and separated by 2 m. A head of a mannequin with a resolution of 28 lines and a frame rate of 14 frames per second was transmitted.

Once discovered the possibility of transmitting moving images through space, thanks to its decomposition into a series of small bright dots that are transmitted in the form of electronic impulses, it was only necessary to find a device to undertake the reverse process, meaning, the rebuilding of the image acting as receiver. This is what Zworykin achieved through a tube called "iconoscopio"¹⁷.

From 1925 through 1931, when empirical work could finally become applicable technology to the industry, in a number of technologically developed countries, like the United States, Great Britain, Germany and France, it was possible to arrive to similar conclusions from different processes, allowing each of these countries to premier television during the 1930's.

Even though all-electronic color was introduced in the U.S. in 1953 (Butler, 2006: 290), high prices and the scarcity of color programming slowed its acceptance in the marketplace. On January 1, 1954, the first national color broadcast occurred (the 1954 Tournament of Roses Parade¹⁸), but during the following ten years most network broadcasts, and nearly all local programming, continued to be in black-and-white.

Only until the mid-1960s, color sets started selling in large numbers thanks to the color transition of 1965 in which it was announced that over half of all network prime-time programming would be broadcast in color that autumn. By 1972, sales of color sets finally surpassed sales of black-and-white sets. And in the 1980s, the development of cable and satellite television allowed for more channels and encouraged businessmen to target programming toward specific audiences.

During the 1990s, as cable and direct-satellite television systems increased the number of channels, the hold of government-funded networks began to decrease. A reason why many countries around the world started to move more toward the U.S. model of privately owned, advertiser-supported television networks (Nieto Samper, 2014). By 1998, it was already

¹⁷ The key aspect of the Iconoscope was that the integrated object was sensitive target image, and the collected the charge developed by light impacts through reading received between scans.

¹⁸ The Rose Parade is part of "America's New Year Celebration" held in Pasadena, California each year. It is a festival of flower-covered floats, marching bands, equestrians and the Rose Bowl college football game on New Year's Day (but moved to Monday, January 2 if New Year's Day falls on a Sunday).

possible to watch a video on the World Wide Web and to see and search television broadcasts on a computer.

Challenges of current television in respect with the audiovisual industry

At present, the viewer is confronted with a wide range of television channels, a variety of programs, formats, etc., which a priori can make, socially speaking, programming television somewhat difficult as a conversation and reduce contact with other family members, becoming more introverted and closed in oneself; but still, viewers follow sharing opinions, but gradually the forums and meeting points online is becoming the most suitable places for this, especially for fiction series (Bjur, 2010).

And on the other hand, more technically speaking, new technologies and especially Digital Terrestrial Television (DTTV)¹⁹, which is a technological evolution of broadcast television and an advancement over analog television, have diversified television programming, emerging specialty chains that are becoming competition for the generalist. Still, the chains with more years of experience with general content remain the most seen in the panorama. (Kantar Media, 2010).

2.3.3 Video/dvd

Origins

Until the 1980s the only way to watch a movie or show was going to a venue or theater, with the limitation that if one did not go over the projection period, the opportunity to see it would vanish (Jozefowietz, Kelley and Brewer, 2008: 140). Therefore, the appearance of the video cassette recorder (VCR) was a major change in the habits of consumers, giving them an opportunity to choose when and where to see a feature film or show (series,

¹⁹ The advantages of digital terrestrial television are considered to be similar to digital versus analog in platforms such as cable, satellite, and all telecommunications. The efficient use of spectrum and provision of more capacity than analog, better quality images, and lower operating costs for broadcast and transmission.

documentaries, program ...), without limitation of time once the product has done its premiere.

Thus, the 1980s was marked by the development and growth of the video industry at home, arriving in the United States in late 1990 with figures in this industry accounted for 56% of revenues in the audiovisual sector (US 16 million), and also surpassing the box office (22%) or other media -cable or Television- with 23% (Video Software Dealers Association, 2000).

Definitely, the video became a mass market, hence the want to dominate this market was the target of several companies, being two the ones that came to make an impact: SONY and JVC / Matsushita. Each had bid a different format, the first Betamax (less known) and the second VHS, a format that was finally recognized as a synonym for video.

Betamax was a format that appeared in 1976 with a high price and with an emerging market. However VHS²⁰, which appeared only a year later, had penetrated more strongly, with sales in 4 months who compared the half of what SONY had sold in a year. So gradually, the JVC format was beating SONY, 30% in 1978 to triple sales in 1983, rising to consolidate as the market leader format (Perez-Prado & Lopez-Sanchez, 2008: 54-57).

As the decade of 2000 went on and with it the technological progress, the VHS format was losing weight in the market to new formats such as DVD (Digital Versatile Disc), of higher quality and lower price. The data show that in 2001 a total penetration of VCRs in American homes was reached (MPAA²¹, 2002), and from that date the acquisition of DVD

²⁰ In American homes VHS became a must-have, by devoting an average expenditure of 109.60 US dollars a year per person, and 56 hours of time per person to their viewing (Josefowitz, Kelley & Brewer, 2008: 140)

²¹ The Motion Picture Association of America (MPAA) is an American trade association that represents the six major Hollywood studios. It was founded in 1922 as the Motion Picture Producers and Distributors of America (MPPDA) to advance the business interests of its members. During its formative years it took on the role of devising guidelines for film content which resulted in the creation of the Production Code, and currently administers the MPAA film rating system.

In recent years, the MPAA has advocated for the motion picture and television industry through lobbying to protect creative content from piracy and for the removal of trade barriers. Moreover, the MPAA has also long worked to curb copyright infringement, such as recent attempts to limit the sharing of copyrighted works via peer-to-peer file-sharing networks. Former Democratic Senator Chris Dodd is currently the Chairman and CEO. (Motion Picture Association of America, 2014).

players by consumers happened relatively quickly: in 2003, 50 million Americans had already bought a DVD player (Bakalis, 2003).

Referring to European data, since the DVD was first introduced in the United Kingdom, the number of acquisitions had increased exponentially, going from 4 million units in 1999 to 145 million in 2003, surpassing, as it happened in the United States, sales of VHS videos, which market had begun to decline since 2001 (Knight, 2007: 21).

Nowadays, the DVD format is fully positioned around the world, and as it happened with the advent of video and the struggle of formats in which VHS won the battle, a new fight has been played for the standardization of formats in regard to the DVD technology. This time the leading companies are SONY and TOSHIBA. SONY, after getting to learn from their mistakes of the 1970s, implemented the Blue-Ray market as standard for the current generation (Perez-Prado²² and Lopez-Sanchez, 2008: 62).

Challenges of current video/DVD in respect with the audiovisual industry

A series of challenges are currently on the way for the dvd industry. For example, sales and rentals of DVDs and BLU-ray discs showed a fall by 7% to U\$10 billion in the first nine months of 2010 compared with the previous year, according to the industry body The Digital Entertainment Group, an industry association that advocates and promotes entertainment platforms, products and distribution channels on behalf of the motion picture, music, consumer electronics and technologies companies.

Moreover, the home entertainment experience has been greatly transformed. There is content delivered on-demand through web-enabled set-top boxes, games consoles, and now the iPad, a mobile computer with display, circuitry and battery in a single unit; which has stolen the DVD's crown as the fastest-adopted consumer device as it is the top-selling line of devices with 100 million sold between its release in April 2010 and mid-October 2012 (Chen, 2012).

2.3.4 Multimedia (animation and video games)

²² Associate Professor at the Complutense University of Madrid, tutor at the h2i Institute and professor of business innovation and design at various academic institutions. He is also an academic reviewer of management journals as Universia Business Review.

The multimedia word is fashionable and on everyone's lips since the beginning of the XXI century, using it as a synonym of interaction, digital technology, devices with Internet or any electrical device that can interact with the consumer, and despite its repetition and overuse there is no clear agreement as to its meaning (Feldman, 1994: 1-4; Jankowski and Hansen, 1966: 2-4). In this thesis, I will divide the field of Multimedia into two specific areas that are of great importance to the audiovisual industry.

2.3.4.1 Animation

Animation is the simulation of a movement created by a series of images or pictures. A simple example of this are cartoons, which belong to traditional animation. Over the years, image animation has evolved considerably. And until some years ago it was necessary to draw each frame and join them to form an animated image. Now the computer use can create much more realistic scenes.

Computer animation can be defined as a form of presentation of moving information in digital form through a continuous sequence of selected images or pictures that have been created or generated by computer (Zéau²³, 2006), and is nowadays mainly used in videogames and movies.

Description of the concept

It is necessary to know the difference between a video and animation. The video takes the continuous movement and breaks it into squares while animation breaks a series of static images and puts them all together in order to create the illusion of continuous movement. Currently, animations are not made only through drawings; they can be created from any type of still images as photographs (Smith, 1996). The more consecutive images conform an animation, the more realistic it will look like.

Animation means "Give Life" (Shone, 2004). It makes reference to the interpolation of frames over a finite period of time. As a discipline, it is practiced with the intent of creating

²³ Caroline Zéau is master of conference of cinema at the Faculty of Arts of the University of Picardie Jules Verne in Amiens.

an illusion of movement. It can be recorded on either analogue media, such as a flip book, motion picture film, video tape, or on digital media, including formats such as animated GIF, Flash animation or digital video. The primary job of an animator is to give life to a static image by giving it image motion and personality. For this, digital animation with the help of other computational tools is the technique by which this occurs.

To create the illusion of movement, an image is displayed and very quickly replaced by a new image in a different frame. Regularly, only an amount equal to or greater than 12 images or frames per second can achieve this goal, although nowadays in the film industry it is often used a convention of no less than 24 frames per second in order to achieve the effect of continuous motion.

In the past, animating was a long and very arduous process, mainly because, at the time, each frame of a given scene was hand-drawn, then transposed onto celluloid, where it would be traced and painted. These finished "cels" were then placed together in sequence and filmed, one frame at a time. Nowadays, animation methods have become far more varied. Today's cartoons can be now created using any number of interesting methods, mostly using computers to make the animation process cheaper and faster, something that makes the animator's job less tedious and more creative.

There are two main types of digital animation: 2D and 3D animation. The 2D animation is generally computer-assisted animation, where the animator draws objects and characters by hand or computer, creating key frames at different positions. Subsequently, through a process called tweening²⁴, the computer generates intermediate frames to give the appearance that each image is converted smoothly into the next. A representative example of 2D animation is the old cartoons.

Meanwhile, 3D animation is computer generated animation in its entirety. Given the complexity of drawing in three dimensions, it cannot be crafted. Using mathematical algorithms, animators can set objects to enforce or break physical laws such as gravity,

²⁴ Inbetweening or tweening is the process of generating intermediate frames between two images in order to give the appearance that the first image evolves smoothly into the second image. Inbetweens are the drawings between the key frames which help to create the illusion of motion. It is a key process in all types of animation, including computer animation.

mass and strength. For example, instead of animating every hair on the head of a man, the animator digitally programs the structure of the hair to be gently shaken by the wind effect (Roos, n.d.).

Looking back, 3D digital animation dates back to the early 60's, where it was used initially for scientific simulations in research centers in the United States. Artistic experimentation began to make its appearance by mid-1960s, and by the mid-70s, many such efforts were beginning to enter into public media. By the late 1980s, photo-realistic 3D was beginning to appear in cinema movies²⁵, and by mid-90s had developed to the point where 3D animation could be used for entire feature film production.

From the very beginning until today, 3D animation has developed exponentially in direct relation to computer equipment. Currently, an average desktop runs nowadays 5,000 times faster than in the 60's, making the cost of the technology required for digital animation would decrease from \$ 500,000 to below \$ 2,000 (Tyler, 2000). On the other hand, audiences generally find animations to be much more interesting with sound, so voice actors and musicians, among other talent, may be added as necessary to add aural depth.

Overview of current animation in respect with the audiovisual industry

Computer animation is nowadays one of the most rapidly expanding areas of computer graphic, encompassing both technical development and most importantly, creativity. The expansion of the market and the applications of computer animation are predicted to have an even more explosive growth for many years to come. It is certainly an exciting, fast-changing and rewarding area to be involved with.

There are a great variety of applications within the animation industry, but the most covered are Autodesk 3D Studio Max or Maya, Adobe Photoshop, Adobe Premiere Pro, which is a timeline-based video editing software application; ZBrush, a digital sculpting tool that combines 3D/2.5D modeling, texturing and painting, and the game engine C4,

²⁵ The first use of 3D wireframe imagery in mainstream cinema was in the sequel to *Westworld*, *Futureworld* (1976), directed by Richard T. Heffron. This featured a computer-generated hand and face created by then University of Utah graduate students Edwin Catmull and Fred Parke which had initially appeared in their 1971 experimental short *A Computer Animated Hand*.

which is used to create 3D games and other types of interactive virtual simulations for PlayStation 4, Windows (XP and later), Mac OS X (versions 10.9 and later), and Linux.

Autodesk 3D Studio Max (Maya) is used to create interactive 3D applications, including video games, animated film, TV series, or visual effects. Adobe Photoshop is an industry-standard tool in graphics, animation, video, and new media production where, for professionals, it is necessary to have basic image manipulation skills using Photoshop, and also knowledge in fundamental topics like color management, scanning, photo retouching, imaging, special effects, and filters and masks.

The exponential advances in technology in the digital age have been the architects so Animation Services²⁶ expand in applications and audience, becoming one of the fastest growing industries today. The demand for animated content has become massive thanks to the penetration of television cable, satellite TV, internet, etc.

The overall size of the animation industry in conjunction with the videogame industry was US\$ 122 billion in 2010. This industry is defined by 4 major blocks: North America, Europe, Asia Pacific - Japan and the rest of the world, where North America is the most important with 42% of full participation. Looking at the history, we can see that these industries as a whole grew at a rate of 12% compounded annually between 2005 and 2009, almost doubling in 6 years.²⁷

Meanwhile, looking ahead, it is estimated that both industries expand to meet the US \$ 243 billion by 2016, implying a CAGR²⁸ of nearly 13% for 6 years, slightly higher than the historical rate. At the same time, it is expected that the Asia Pacific - Japan region is the most developed, with a rate attempt of 19% mainly driven by video games (Global Animation & Gaming, 2011).

²⁶ Some of the most important Animation Services are: Sound Recording Services, Audio post services, Filmmaking services (feature films, documentaries, series, cartoons, etc.) to be shown in cinemas and television; Filming services of motion pictures for promotion and advertising, Post production services of motion pictures and video tapes, Broadcasting services, Original production services of television programs, and Original production services of broadcasts.

²⁷ “Animation. Broadcasting. Gaming. On the Cusp of Growth” - Deloitte

²⁸ Compound annual growth rate (CAGR) is a business and investing specific term for the geometric progression ratio that provides a constant rate of return over the time period. It is often used to describe some element of the business, for example revenue, units delivered, registered users, etc. It is particularly useful to compare growth rates from different data sets such as revenue growth of companies in the same industry.

2.3.4.2 Video games

Origins

The history of video games has its origins in the 1940s when, after the end of World War II, the victorious powers built the first programmable supercomputers like the ENIAC in 1946, the first electronic general-purpose computer. The first attempts to implement playful programs, initially chess programs, appeared shortly after, and were repeated during the following decades.

The first modern games appeared in the 60s, and since then the world of video games has not ceased to grow and develop with the only limit imposed on it by the creativity of the developers²⁹ and the evolution of technology (Donovan, 2010). In recent years, we are witnessing an era of technological progress dominated by an industry that promotes a rapid consumption model where new blockbusters become obsolete in a few months, but which at the same time, a group of people and institutions, conscious of the role that programs pioneers, companies that defined the market and the great visionaries had on the development of the industry, have initiated the formal study of the history of video games (Steinberg, 2010).

In recent years, we are witnessing an era of technological progress dominated by an industry that promotes a rapid consumption model where new blockbusters become obsolete in a few months, but which at the same time a group of people and institutions, conscious of the role that the pioneering programs, companies that defined the market and the great visionaries that had on the development of this industry, have initiated the formal study of the history of video games.

The most immediate reflection of the popularity that videogames have reached around the world in contemporary societies constitutes an industry that employs 120,000 people and generates billionnaires benefits that increase year after year. The impact resulted in the appearance of the videogame's world meant a revolution whose social, psychological and cultural implications are the subject of study for a whole new generation of social researchers who are addressing the new phenomenon from an interdisciplinary perspective, using diverse research methodologies that are

²⁹ Game developers are classified into three categories: third-party developers, domestic developers and smaller independents. Developers generally hire a group of programmers, game designers, artists, sound engineers, producers and testers, even though some of these roles can be external.

commonly used in cultural anthropology, artificial intelligence, communication theory, economics and aesthetics, among others. (Zackariasson, P³⁰. & Wilson, T.L., 2012)

Like it happened with film and television, videogames have achieved in just half a century the status of artistic medium, and such an achievement has not taken place without a transformation and constant evolution of the concept of game and its acceptance. Born as an experiment in the academia, it managed to establish itself as a product of mass consumption in just ten years, exerting a tremendous impact on the younger generation who watched the game with a new audiovisual medium that allow them to star forward their own stories. (Flew, Terry, Humphreys & Sal, 2005).

Overview of current videogame field in respect with the audiovisual industry

According to the UNESCO, international video game revenue is approximately estimated to be around U\$ 81.5B only 2014 (UNESCO Institute for Statistics, 2013). This represents more than twice the revenue of the international film industry in 2013. The largest video game revenues by nations are the United States (\$ 20.5B), China (\$ 17.9B) and Japan (\$ 12.2b), and the largest regions are Asia (\$ 36.8B), North America (\$ 22.2B), and Western Europe (\$ 15.4B). (Newzoo, Games market Research, 2013).

The video game industry encompasses dozens of working-disciplines, employs thousands of people around the world and in recent years has experienced high-growth rates, due to the development of computing, processing power, more realistic images and the close relationship between films and video games, which make consumers recognize the titles soon. In the 2000s, video games have generated more money than the film and music industries together, at least in Spain, where the video game industry generated 57,600 million euros in 2009. (Johnstone, 2014).

2.3.5 Radio

Radio is considered to be the first 'modern' media form, and experienced a huge impact on the history of the 20th century. The birth of radio ushers in the era of mass communications, and so, for the first time, information was able to be broadcast. Many

³⁰Peter Zackariasson: Associate professor in marketing, University of Gothenburg

scholars have likened the explosion in radio in the 1920s to what is happening with the internet nowadays.

Origins

The earliest history of this communication tool we can place in the early nineteenth century, when Alessandro Volta invents an object that is so common to us nowadays: the voltaic pile, or what is the same, a battery that could produce electricity.

From that point, the first telegraphs in the world were built; objects very primitive back then but that evolved thanks mainly to contributions of Samuel Morse, who, in 1840, introduces two fundamental changes in those rudimentary telegraphs. On the one hand, replaces the magnetic needles used by his predecessor in this field (Henry Cook) for the process of identification of signals, by a strip of paper. And on the other hand, Morse created something that is still valid: the Morse code; code that, through a combination of dots and dashes, can transmit any message.

Thirty-five years later, in 1875, Graham Bell, favored the birth of telephony. This inventor got the sounds could spread through a cable. But not only telegraphy and telephony were involved in the development of radio. Other phenomena were equally or more important than these. The discovery and subsequent measurement of electromagnetic waves, also called Hertzian because the person who invented the process to measure them was Heinrich Hertz in 1887, led to the creation of the first radio receiver. However, until the advent of wireless telegraphy, from the hand of Guillermo Marconi³¹, the transmission was limited. Marconi's contribution allowed beeps could spread to just under 20 kilometers away. Logically, the system had its flaws, because, for example, the device could not carry nor words or musical sounds. It was not until well into the twentieth century when the contributions of A. Fleming and R. A. Fessenden allowed the transmission of the human voice. From that moment would start, really, the radio we know today.

Broadcasting

The first documented radio transmission took place in 1895 and was sent by a 21 year old Italian, Guglielmo Marconi, who had conducted a series of simple experiments using a radio transmitter and receiver; the transmitter placed at his house, and the receiver placed three miles away. He asked his servant to fire a gun when the transmission had been received - the three dots ... of the letter S in Morse Code.

³¹ Marconi is often credited as the inventor of radio, and he won the 1909 Nobel Prize in Physics with Karl Ferdinand Braun "in recognition of their contributions to the development of wireless telegraphy".

At first, the Italian government showed no interest at all in Marconi's invention, so he continued his experiments in Britain where he had the full support of the Minister of Post. Marconi (who, curiously, had never gone to university and had taught himself physics and electronics) took out several patents and began to build radio stations across the south coast of Britain. In 1901, he crossed the Atlantic to St John's Terranova³², and on that point, on 12 December, he received the first weak transatlantic radio signal, another ... Morse Code.

But it was not until after World War I (during which radio communications had been used intensively) that the first mass broadcasts started. This happened on November 6th in 1919 when a Dutch concert was broadcast at a pre-arranged time, making it possible for amateur radio enthusiasts to tune in. The first commercial radio station opened in July 1920 in Pittsburg, and thus the radio quickly became a popular source of entertainment like music, comedy, drama, sport, information and news.

There are some traditional technologies that are considered broadcasting and a few newer ones which, depending on methodology, can broadcast as well:

- Traditional Radio Broadcasting
 - 1) AM (Amplitude Modulation): Where the amplitude of a carrier wave is varied in accordance with some characteristic of the modulating signal.
 - 2) FM (Frequency Modulation) : Which is a method of impressing data onto an alternating-current wave by varying the instantaneous frequency of the wave.
- New Tech Broadcasting
 - 1) HD Radio, which transmits digital audio and data alongside existing, AM and FM analog signals. According to the developer of this technology, Ibiquity, it makes AM sound like FM and FM sounds like CDs.
 - 2) Satellite Radio, which can deliver programming to millions of listeners who are willing to pay for special radio equipment along with a selective monthly subscription fees.

Challenges of the radio in respect with the audiovisual industry

³² St. John's is the capital and largest city in Newfoundland and Labrador, Canada. It was incorporated as a city in 1921, and yet is considered by some to be the oldest English-founded city in North America.

In early 60s, the radio experienced a bad time for a fact that would change many things: the advent of television. While television would reach homes in most Europe in 1956, it was not until the 60s, especially to 70, that its use would begin to generalize massively. The global economic situation of the average family would not allow for that time everyone had a television at home as currently happens.

With the popularization of television, the radio had to be restructured and see what the advantages are of the new medium (although, in fact, had and continues to have). It is true that TV could output images, but radio was much more agile and quicker. In addition, 40 years ago, the radio could reach places that TV had no access, because by then the television infrastructure was little operational.

As for broadcasting, The 2000s welcomed the introduction of digital radio and direct broadcasting by satellite (DBS) in the USA, where it first started. Digital radio services, with the exception of the United States, were allocated a new frequency band in the range of 1,400 MHz. In Canada, the Canadian Radio-television and Telecommunications Commission plans to move all Canadian broadcasting to the digital band and close all mediumwave and FM stations.

More regular Shortwave broadcasts using Digital Radio Mondiale (DRM³³), a digital broadcasting scheme for short and medium wave broadcasts, have already started. This system makes the normally scratchy international broadcasts clear and nearly FM quality, and much lower transmitter power, making it much better and easier to listen to and has a great variety of languages too.

³³ The basic principle of DRM is that bandwidth is the limited element, whereas computer processing power is cheap.

THIRD CHAPTER

THE AUDIOVISUAL INDUSTRY IN CANADA, PARTICULARLY IN THE PROVINCE OF QUEBEC: GENERAL APPROACHES AND CHALLENGES

To set the context for the subsequent analysis of the audiovisual industry, this section summarizes the history of the evolution of this sector in Canada specifically in the last forty years, highlighting its development and chronological evolution. At the same time, this section discusses the key differences (if present) between the market languages (English and French), external factors affecting the area of the AV distribution and major Canadian policies that direct impact on the AV industry.

Throughout this chapter, I will also address, descriptively, the audiovisual sector (Television, film, Video/dvd, Radio and Multimedia, according to the authors previously mentioned) in the Canadian territory; and second, using the same parameters of description, at the provincial level, specifically the province of Quebec, which is the subject of this research

And to conclude with this descriptive chapter, I will clearly describe how the process of elaboration is of making projects that are related to the audiovisual industry, at the federal level and as well at the provincial level, in Quebec. I will address from its funding to the respective institutions that are responsible for regulating and promoting this sector in the territory

3.1. Description of the country

Canada is considered to be one of the most important countries in the world, perhaps a jewel of America on quality of life and economic indicators. According to the Human

Development Report published by the United Nations Development Programme (UNDP)³⁴, Canada reached an index of 0.908 in this area and thus ranks sixth in the world rankings (187 countries). (Rojas Parra, 2013).

From 1980-2011, Canada has experienced a positive trend in human development that exceeds the rate in the OECD. These results are the sum of social and economic conditions that promote wellness; for example, public expenditure on health as percentage of GDP is 7.1, life expectancy at birth is 81 years and the mortality of children under five years is six per thousand births. On the other hand, education spending as a percentage of GDP is 4.9, expected years of schooling is 16 and the average years of education reach 12.1. (Rojas Parra, 2013).

With an area of approximately 9.9 million square kilometers, Canada is the second largest country in the world only after Russia, and is inhabited by a population of about 34.9 million people. It is one of the 15 richest and most prosperous nations in the world with a GDP of USD \$ 1,833.44 billion by 2012, according to figures published by the IMF, reaches a per capita income of \$ 50,862 US.(Statistics Canada³⁵, 2014).

At the same time, economically speaking, the North American country has an attractive profile; with a population exceeding 34 million, Canada has one of the most robust economies in the continent and the world; its GDP in 2011 was US 1.736 billion, exports worth US 452,000 million and imports US 462,000 million (goods). According to the WTO, Canada ranks 13 merchandise exporters in the world ranking of trade, and 11 imports. (Rojas Parra, 2013).

Similarly, Canada has a large and active trade liberalization, with a level of trade of US\$ 917.1 billion to 220 countries in 2012. This, together with its high per capita income, positions the country globally as one of the most attractive markets for international

³⁴ The Human Development Report (HDR) is a milestone published every year by the Human Development Report Office of the United Nations Development Programme (UNDP).

³⁵ Statistics Canada is the Canadian federal government agency commissioned with producing statistics to help better understand Canada, its population, resources, economy, society, and culture. Its headquarters is located in Ottawa.

exporters. It should also be noted the fundamental role played by the service sector in the Canadian economy, as it accounted for 70% of GDP in 2012 (Statistics Canada, 2014).³⁶

After dealing with the effects of the economic and financial crisis triggered in 2008, Canada has achieved one of the largest recoveries in the group of G7 countries, supported by a solid financial system and strong domestic demand. But it is important to note that Canada is still quite dependent on its abundant natural resources (mining, oil, etc.) and its foreign trade, mainly with the USA.

Politically, Canada is a constitutional monarchy dependent on the British Crown, which means that the highest authority in the country is Queen Elizabeth II, who is represented locally by the Governor-General, who is appointed by the Queen on the advice of the Canadian Prime Minister. The current governor general is David Lloyd Johnston, who has served since 1 October 2010.

Meanwhile, the head of government in Canada is the Prime Minister. The current and 22nd Prime Minister of Canada is the head of Conservative Party's Stephen Harper, who was appointed on February 6, 2006, by Governor General Michaëlle Jean, following the general election that took place that year.

- Bilingualism in Canada

As it was previously mentioned at the beginning of this thesis, Canada's population is characterized mainly by its diversity. According to the latest official census of 2006 (Statistics Canada, 2013), of the 32 million Canadians, 16% belong to visible minorities (Latin American, African, Arab, Asian, etc.) and 3.9% claiming Aboriginal identity (First Nations - Native American, Métis and Inuit).

About 20.1% of the population is allophone and has a mother tongue other than the two official languages of Canada since 1969: English and French. Nowadays, allophones

³⁶ Canada has the eleventh (nominal) or 14th-largest (PPP) economy and is one of the world's wealthiest nations. It's a member of the Organization for Economic Co-operation and Development (OECD) and Group of Seven (G7). As with other developed nations, the Canadian economy is mainly dominated by the service industry, which employs about three quarters of Canadians. (Statistics Canada, 2014).

constitute an increasing share of the Quebec population and are the most important source of population increase in the province, reflecting both increased levels of immigration, declining birthrates among established anglophone and francophone populations, and a shift in immigration from English-speaking countries to Asia and the Americas (Statistics Canada, 2014).

Canada adopted an official policy of multiculturalism in 1971 , with obligation for the federal government to take into account the reality of society Canada, in particular by the progressive introduction of policies aimed at promoting diversity, like the equity employment program . And this is because according to official statistics (Statistics Canada, 2014), it is projected that 25-28% of the population should be born out of Canadian territory by 2031. To this diversity is further added the constitutive distinction of the modern Canadian identity among Canadians of British or French origin.

3. 2 General description of the province of Quebec

3.2.1 Historical facts

Its earliest roots are French; the first colonists ever to set foot on Canadian land were French explorers: Jacques Cartier, born in 1491 in St. Malo, Brittany, was the first in 1534, and half a century later, Samuel de Champlain. This began the historic period called "Nouvelle France", which began in 1608 with the founding of the City of Quebec City , and ended in 1763, the year of transfer of the territory to the British .

Even today, many historians consider this period as heroic, mainly because despite the paucity of inhabitants, the harsh climate and the relative disinterest of the metropolis, wars and hostilities of the powerful England, none of this prevented the small colonies develop, grow and achieve an extraordinary work of land use and exploration of territory (Bayly Johnston³⁷, 2001: p 8-9).

³⁷ Andrew John Bayly Johnston is a Canadian writer and historian. He has written two novels and is the author, or co-author, of thirteen books and over 100 articles about different aspects of the history of Atlantic Canada.

At that time is when the distinction between those who spend some time and those who remain is born. In short, between the French and Canadians. Meanwhile, explorers in the service of England also set foot in the continent to the Atlantic Coast, settling in the Island of Newfoundland. From there, the two powers struggled for exclusivity. In 1763, after the Seven Years' War³⁸ and the ceding of New France to the British, the great French dream ends in the New World, of all North America is handed over to the British. (Bayly Johnston, 2001).

In 1774, after a long series of negotiations, the British government granted the French Canadians a territory, through the "Quebec Act". Likewise, it is restored and officially recognized French as the official language, Catholic faith, and French civil law for matters of private law, except that in accordance with the English common law, it granted unlimited freedom of testation. Within this context of difficult survival, Quebec does not stop feeding of the mainstream of European culture. (Bayly Johnston, 2001).

3.2.2 The Quiet Revolution

Québec's participation in the two great European wars connect it with the ideas of the world, and ironically, its participation in the Second World War contributed to its emancipation, because in August 11-24, 1943 the Quebec Conference was created and was a highly conference between the British, Canadian and United States governments where they began discussions for the planning of the invasion of France, the increase of a bombing offensive against Germany and also about improving the coordination of efforts to develop an atomic bomb (Quebec Conference (1943), 2014).

During the decade of 1960-1970, deep renewing forces worked and burst creating large changes that historians call this period as “the Quiet Revolution” . Undoubtedly, this is the most important decade in early modern history of Québec, and it is during these years that the expression "Québécois” is born to designate their inhabitants and thus, causing a movement of affirmation and assertion of the Francophone population.

³⁸ The war was a great success for Great Britain, which gained the bulk of New France in North America, Spanish Florida, some Caribbean islands in the West Indies, the colony of Senegal on the West African coast and superiority over the French trading outposts on the Indian subcontinent.

3.2.3 Administrative Structure of Quebec

Québec, with 1,667,441 km² is the second province in Canada by extension, and the second in population after Ontario. The GDP per capita in Quebec is \$ 38,900 and the official language of the province is French; of 7, 5 million people, 80% are Francophone (native language), 8% are Anglophone and 12% are allophones. To this, it must be added the fact that 83% of the population is considered of Catholic culture. These features are what separate Quebec from the rest of Canada: English-speaking, Anglo-Saxon culture and whose religion is mostly Protestant. (Hayes³⁹, 2008)

As it has been previously explained, Canada is a federal State, and therefore, it has two levels of Government: federal level, which consists of the Parliament and Government of Canada; and the provincial level, that includes provincial Governments and legislatures. Each level of Government is sovereign with respect to certain tasks while others can also be shared.

The provinces have a high level of autonomy from the federal government. They are responsible for most of their social programs such as education and social welfare. But in many cases the provinces have exclusive jurisdiction over non-shared, such as the health and Culture. In these cases, provincial governments may waive federal policies and implement their own policies in their own territory, as Quebec has done.

3.2.4 Major phases of cultural development in Quebec

-Establishment of the Ministry of Cultural Affairs

In 1961, at the provincial level, the Liberal government of Jean Lesage in Quebec created the Ministry of Cultural Affairs inspired by the French model created in 1959 , and the first person to take office was Georges-Emile Lapalme in March 28, 1961. Meanwhile, at the

³⁹ Derek Hayes is a Toronto writer who was born in London, Ontario. He has a BA in history from Queen's University and a Bachelor of Education from The University of Maine at Presque Isle. He currently teaches in Toronto.

federal level, Canada created the Arts Council of Canada in 1957, in order to foster and promote the study and enjoyment of, and the production of works in, the arts.

The model of cultural intervention by which Quebec chooses is "State Architect": the government sets the goals, means and decides to handle their application. This was the mandate of the Ministry of Cultural Affairs applied to the arts and letters. Canada chooses the model of "state Maecenas" (at arm's length) of British inspiration, that is to say, it is based on a desire to establish a greater distance between the political and the artistic choices and stronger assurances and autonomy of companies and creative freedom.

It would be also necessary to describe another great American model: "state facilitator" applied by the US, by which it is forbidden to the central State to get into three areas: education, health and culture, which should remain on the hands of the citizens and the community in general. The role of the Federal Government in this case is just to make things easier for its bodies through fiscal or legislative policies. These two models, geographically close to the province of Quebec, ended up influencing its policies.

3.3 General description of the audiovisual sector in Canada

One of the countries that has contributed on a massive level to the audiovisual industry has been Canada. The country not only has produced close to 681 audiovisual coproductions, with total production budgets of close to \$5 billion in the past ten years alone (Government of Canada, 2014), but takes also pride in being a world leader in audiovisual treaty coproduction: In the past 50 years, Canada has signed audiovisual coproduction treaties with 53 countries . (See annexe No. 1)

The main reason to address this issue is the need to understand that audiovisual services, while cultural, have an importance that transcends its economic value. As we have explained it previously, audiovisual services contribute to intercultural dialogue, which is

the basis for a lasting peace and sustainable human development. They are a means of education that provides ideas and raising awareness about public goods (UNCTAD⁴⁰, 2002)

There are currently a great variety of policies in Canada, on a provincial and federal level , related to the audiovisual field , and one of the reasons why I decided to choose this topic is because the Canadian audiovisual industry plays a leading role, more specifically on the export sector: The industry generates large-scale economic activities - 2.7 billion Canadian dollars only production - and make tens of thousands of jobs . Canadian Exports of audiovisual products, as of 2011, were an estimated total of 1,400 million, including the value of the production of services in Canada.

A very important aspect and that highly affects the audiovisual industry is the difference between the francophone and anglophone industry. The French industry is generally more selective in its contents. In the Anglophone area most of the industry comes from the U.S. enjoying a large number of spectators and audiences. Business opportunities are presented mainly in documentaries, feature films, independent films and animation, if businesses can adapt to the preferences of the Canadian public and the peculiar characteristics of bilingualism.

However, it has captured my attention to analyze some of the factors that have threatened the social cohesion that I referenced before concerning the audiovisual field, such as the processes of globalization, technological change, trends towards social fragmentation, demographic changes and increasing inequalities. Among the positive factors, the variables I would like to cover in the thesis are conflict resolution, equal access to opportunities, guarantee of rights, promotion of a decent and inclusive society, and building confidence in individuals and institutions.

Furthermore, I consider important to expose how the identity of the Canadian nation is being altered today due to the constant changes that are being generated inside the country given the close relationship between the governments of Canada and the United States. And

⁴⁰ The United Nations Conference on Trade and Development (UNCTAD) was established in 1964 as a permanent intergovernmental body and is now the principal organ of the United Nations General Assembly dealing with investment, trade and development issues.

this is because Canada is adjusting its policies in the audiovisual sector to take a more active role in the world, a purpose that is not shared by many sectors of the Canadian civilian population and that is affecting their daily lives for the disappearance of principles that previously defined their nation.

3.3.1. Television

In this section I will proceed to generally describe and explain the origins, the evolution process, current role and future trends of the audiovisual sector in the national territory of Canada, considering the two subsectors that are object of this thesis

Origins and evolution

In 1951, the Canadian Broadcasting Corporation launched the CBC building located at the Dorchester Boulevard, in West Montreal. The first television station of Radio-Canada, CBFT- Montreal, was for the first time on the air on September 6, 1952. Throughout the decade, music had a very important place in the programming on radio and television. In 1952, nearly half of the 24,926 total broadcast hours are devoted to music programs. (Filion, 1996: 447).

CBAF Moncton, in New Brunswick, became in 1954 the first station located outside of Quebec. The 1950s and 1960s were the scene of many firsts in programming - both radio and television - and technological advances. The arrival of color television took place during the next decade, on 1 July 1966, but the service offered by the TV was full color in 1974. (Filion, 1996: 449).

During this decade, Canada made history by launching the first national satellite in the world. Launched on November 9, 1972, the Anik A1 satellite⁴¹ gave CBC the ability to reach the Canadian North for the first time. Each satellite was equipped with 12 C-band

⁴¹ The Anik A satellites were the world's first national domestic satellites.

transponders, and thus the ability to issue 12 color television channels. It was then retired from orbit on July 15, 1982 (Filion, 1996: 451).

Many popular radio and television programs mark the 60s and 70s. Public affairs, entertainment, soap operas and other varieties reflected the dynamism and richness of French culture in Quebec and elsewhere in Canada. The new Maison Radio-Canada, located in the South Central neighborhood of Montreal, was constructed and inaugurated in 1973 as a home for the Canadian Broadcasting Corporation's operation in the city.

Certain events of great global importance, particularly the 1967 International and Universal Exposition (EXPO 67)⁴², and the 1976 Summer Olympics in Montreal, allowed the Canadian Broadcasting Corporation to start building a positive reputation around the globe and gain valuable expertise, as well as credibility, in live coverage and international distribution.

During the 60's, 70's and 80's, the network of Radio-Canada is gradually being implemented across Canada. The 70s are considered to be the most fertile in this regard, as many radio and television stations in Windsor, Edmonton, Matane, St. Boniface, Winnipeg, Saskatoon, Rimouski, Toronto and Sudbury then joined Radio-Canada. Sept-Iles, Trois-Rivières and Halifax joined throughout the 80's. (Filion, 1996: 453).

Radio-Canada celebrated its 75th anniversary in fall 2011. This anniversary has closer ties with CBC audiences while demonstrating the contribution of its artisans to its evolution over three quarters of a century. Nowadays, the conventional English-language private television is dominated by three groups of companies: Bell Media with a revenue share of 47%, Canwest Media Inc. (recently absorbed by SHAW MEDIA) with 33%, and Rogers Broadcasting Limited with 14%. The private market for French-language conventional television has two major players: Quebecor Inc. with a revenue share of 65%, and Remstar (TQS) with 23%.

⁴² EXPO 67 is considered to be the most successful World's Fair of the 20th century, with the most attendees to that date and 62 nations participating. It set as well the single-day attendance record for a world's fair, with 569,500 visitors on its third day.

3.3.2 Film

Origins and evolution

First of all, the Canadian film, more than the Mexican one, has considerably suffered from its proximity to the United States because much of its human talent has migrated to Hollywood throughout its history. At the same time and as a consequence, this area has caused the Canadian film industry dependent on American capital throughout its history.

The result is that, just until the 80s, Canada was dedicated to documentaries, because fiction films were held by producers, distributors and exhibitors from the United States or Great Britain. In fact, while the first Canadian documentary film was recorded in 1900, it was only until 1914 that the first fiction tape, "Evangeline"⁴³, was filmed. (Melnik, 2004).

The identity of the Canadian film and higher productions began to emerge thanks to British support and not from the US. The takeoff point occurs in 1939 with the arrival in Canada of John Grierson, the father of English Documentary School, who had a solid technical and ideological education, since he believed that film was a mean of educating people and make aware of social problems. (Melnik, 2004).

Training and the personality of Grierson were crucial in getting documentary-films off the spearhead of Canadian filmmaking. Being placed John Grierson as head of the National Film Board, it was given a boost in funding for Canada to become one of the leading centers of production of documentaries in the world.

The reputation of the National Film Board, which remains to date, was cemented during World War propaganda documentary series as "Canada carries on" and "The world in action". It was a highly productive period in which military, educational, industrial, short films and animation materials were performed. Also, a lot of creative, technical and production staff got trained, under the same thematic routes, which increased the prestige of Canadian cinema.

⁴³ Evangeline was a drama film based on the epic poem of the same name. It is known as the first feature-length dramatic movie ever filmed in Canada, being very successful there and in the United States as well.

After the war, the Canadian film continued to grow. The National Film Board of Canada became a key center of production and increased its funding, yet focused on documentary issues. Within the branches that it promoted, animation and short film were benefited. In these three areas Canada got worldwide recognition at international festivals. (Melnik⁴⁴, 2004).

At that time, British directors of long trajectory like Stuart Legg and Canadians like Norman McLaren, were given the important task to experiment with cinematic forms. McLaren, for example, had international recognition for his works, which were broadcast in in many countries all over the world through various diplomatic missions and cultural organizations.

During the decades of the 50s and 60s, film production increased in the province of Quebec with francophone productions, but the overall level of Canada remained with low production numbers and a fully domestic market. Human talent had to emigrate to America or England to find success, as was the case with Norman Jewison, Irvin Kershner, Ted Kotcheff and Sidney J. Furie. (Melnik, 2004).

Given this overall situation that was negative for the industry as a whole in the country, the Canadian government finally reacted in 1967 and decided to promote film production through funding, scholarships and loans. As a result, in 1970, in the line of fiction, it was possible to produce 25 films against 25 back in 1960. The quantitative change was already noticeable.

But it was not enough only to increase production because, as history showed, at the end of the day the creative talent was still determined to migrate to the United States to have success and better opportunities. It was not until the late 80s and early 90s that Canada could show the world a new generation of filmmakers with enough creativity to speak of a strong Canadian film. (Melnik, 2004).

As we previously explained, Cinema is not only an example of artistic expression. It is also conceived as a very important vehicle for entertainment and, at the same time, it represents

⁴⁴ George Melnyk is a Canadian historian, academic, and writer. As of 2013, Melnyk is the associate Professor of Canadian Studies and Film Studies at the University of Calgary.

a very lucrative industry where an appropriate promotion is one of the many key factors for success. In order to achieve promotion, most Canadian producers develop several types of projects according to the kind of demands of a market dominated by mostly American foreign interests.

Like most cultural industries around the world, the film industry can be divided into three main phases: production, distribution and exhibition or retail (promotion). According to Laura Marquez, scholar in the field of communications sciences from the University of Montreal in Canada, one can understand cultural industries as:

"Sectors that combine the creation, production and marketing of goods and services whose peculiarity is the intangibility of its contents and its cultural character. At the same time, these sectors include print and multimedia, film, audiovisual and phonographic production. The cultural and economic duality of these industries include its main sign." (Marquez, 2006: 206).

In the case of Canada, cultural industries are supported by several organizations and government programs, and are sponsored by national and international festivals, which favor their growth and development. Example of these is the Development Fund of Cultural Industries (FDIC) created in 1991, which aims to support book publishers, newspapers, sound recording and film production and video media, as well as supporting general Canadian cultural production offering a range of financial services, particularly loans for short and long term.

One of the most important and recognized characteristics of the Canadian film industry is that it offers a large number of alternatives on the subject of their contents. One example is that the industry has a D Studio established by The National Film Board of Canada, NFB, where women can produce, write or direct films about themselves.

The Canadian film industry has an important cultural significance despite its small size. The idiosyncrasy of the country means that there are two distinct types of production. On one hand, production in the English language that is clearly aimed at the U.S., and on the other hand, the French production, more oriented to the own Quebec public that are more

responsive and faithful at the box office. Co-productions are important, especially in the Francophone case with their French counterparts.

3.4 Description of the television and film industries in the province of Quebec.

In order to be more specific and precise for systematic methodological reasons, I have chosen to focus on one of the Canadian provinces that show more development, contribution and support gives this audiovisual sector: Quebec. And this is because this province, in addition to an unbelievable variety of scenery and landscapes, provides competitive tax credits for labour costs associated with creation and production.

And we should think about that when we add its infrastructures, technology resources and large pool of specialized talent in all areas of visual effects, the Quebec province truly provides foreign production companies with the possibility of realizing a full range of productions. Already a leader among production centres, Quebec is now the fourth largest visual effects centre in the world, and it will continue its growth.

However, increased competition over recent years and the desire to maintain activity in Quebec have spurred interest for the application of a cluster policy in the film and audiovisual sector, and interest in relational proximity has increased in order to ensure this creative industry's future.

In order to have a clear comprehension of what the audiovisual sector is and comprises, it is important to take into account that the proliferation of audiovisual communications technologies, including sound, video, lighting, display and projection systems, is evident in every sector of society: in business, education, government, the military, healthcare, retail environments, worship, sports and entertainment, hospitality, restaurants, and museums.

3.4. 1 Television

Television in Quebec is a very important element of the culture of the province of Quebec. And with over 99% of households owning a television, it has the power to reach every resident. Although broadcasting is in French, la télévision québécoise has little relationship to its gallic cousin; it's decidedly North American in its approach: a 30-minute programming grid, commercials, local stations, together with the distinction between broadcast television formed around networks of stations and cable television channels, which requires a subscription to receive.

The four major broadcast television networks in the province are Radio-Canada, TVA, V and Télé-Québec. With the exception of local advertising and a small amount of local programming, all four networks air identical schedules throughout the territory. Local stations affiliated with the networks are located in each of the 10 television markets of Quebec: Montreal, Quebec City, Gatineau–Ottawa, Sherbrooke, Saguenay, Trois-Rivières, Rivière-du-Loup, Rimouski, Abitibi-Témiscamingue, and Carleton-sur-Mer. (Tigkos, 1998).

By far, TVA is the most watched network: in autumn 2006, it held 28% of the provincial francophone primetime television audience, compared to Radio-Canada's 19% and V's 14%. And because the population is predominantly French-speaking, only CBC, the English-language television service funded by the government of Canada, is available over the air throughout the province. In cities like Gatineau and Montreal, affiliates of CTV have transmitters, and in cities like Quebec City and Sherbrooke, Global is available over-the-air. (Tigkos, 1998).

The province has the lowest cable television-satellite television penetration rates in the whole country, with 85.7% of residents having cable television, as of 2006. Nowadays, there are more than two-dozen local cable networks that go from sports (RDS) to children's programming (VRAK.TV). In addition to that, with cable television, American networks, which were previous only available in cities near the border of the United States, are now available throughout the provincial territory. The largest cable companies in the province

are Vidéotron and Cogeco, even though a large number of independent cable companies also take their share. (Tigkos, 1998).

3.4.2 Film

For theorists of the Frankfurt School, "Cultural industries are large, monolithic and characterized by being full of power, where the power of his images can manipulate audiences through their messages" (Pearson, 2001: 202), and these are precisely the objectives that the film industry has set in the province of Quebec.

The Quebec cinema is used as a mean to differentiate their own culture given the diversity of cultures that are located in the rest of Canada. In Quebec, it currently exists real potential of cultural production quality, particularly in the publishing, film and sound recording, even if the national audience that they have is not enough.

Canadian bilingualism as a barrier to the cinema

The language is, among other things, the manifestation of the historical, political and cultural realities of a society. First French Canadians and long after Anglo-Canadians used the former imperial language to distinguish themselves from others. But the flag on this strategy, of both cultures, has been the need to fulfill their linguistic conservatism versus natural linguistic evolution (Feldman, 1984: 48).

Due to the great linguistic influence of the Anglo-Canadian and the United States, the province of Quebec took refuge in the French language and tradition, which contributed to its cultural isolation. The importance of French in Québec cinema is as old as the history of film sound in Canada, although, due to the lack of knowledge of the French language in the country, the Quebec film industry is negatively affected.

According to the Canadian Charter of Rights and Freedoms, in the first part of the Constitution of 1982, bilingualism is established on the Official Languages Act in Canada; however, this law article does not absolutely guarantee anything. Despite this law, the vast

majority of Canadian productions are performed in English, and Québécois filmmakers, adhering to cultural traditions and hiding behind the Law of Official Bilingualism, decide to make productions in French. Until now, financial support is still pouring into the films produced in English.

The province of Quebec considers it is essential for the recognition of its culture, as well as for creating and expectations of its film productions, the use of the French language. Although Canada is an officially bilingual country, in the other provinces and territories there is not a broad knowledge of French . (See Annex 3: Bilingualism in Canada). This causes a problem to the Quebec film industry as it is the case of dubbing . In this country, as elsewhere, dubbing is a practice that affects not only the original conception of the work, but the film industry in general.

3.5 Competent federal programs and financial support for the audiovisual sector in the Province of Quebec.

In Canada, approximately between 30% -50% of the sources of funding, exclusively for the film and television industry are public. The main funding programs for audiovisual production are available through the following 3 agencies:

a) Audio Visual Certification Office (Cavco), under the Ministry of Canadian Heritage (Canadian Heritage) :

The Department of Canadian Heritage, or simply known as Canadian Heritage, is the department of the Government of Canada with responsibility for policies and programs regarding different fields such as arts, culture, media, communications networks, official languages (including La Francophonie), status of women, sports, and multiculturalism. It also oversees Royal visits of the Queen of Canada and members of the royal family to Canada.

It was previously a part of the Department of Communications, until that department's technical side was merged into the Department of Industry in 1996, forming the Department of Canadian Heritage from its non-technical side. In late 2008, the multiculturalism component of this department was transferred to the Department of Citizenship and Immigration.

In elaborating its activities and knowing that arts and culture play a vital role in the lives of Canadians while contributing to both quality of life and the economy, the Department of Canadian Heritage is guided by four main priorities in order to make creative industries drive the innovation and give Canada a competitive edge in the international digital economy:

1. To take full advantage of digital technology: The Department is currently modernizing its programs to ensure Canada's competitiveness in a digital world. The national artistic and cultural environment has been positively transformed due to rapid economic changes, unprecedented technological advances and increased global connectivity that has created better and new opportunities in a global marketplace. Now, Canada is ready to become a world leader on the digital stage by acknowledging and recognizing the advantages that the digital revolution offers to the cultural and community life of the citizens.

2. Invest in its own communities, by supporting activities that foster a strong sense of Canadian identity and pride, as well as healthy and vibrant communities. This way, creative industries drive the innovation and give Canada a competitive edge in the international digital economy. For example, the Department will continue to implement the Roadmap for Linguistic Duality⁴⁵, and pursue negotiations for the renewal of the federal-provincial/territorial agreements.

3. Celebrate its history and heritage: This is because Canada is getting ready to celebrate the country's 150th Anniversary in 2017, and therefore, the Department will highlight significant historical milestones in order to strengthen national identity and to help build a deeper understanding of its shared history and heritage. Moreover, the Department will also

⁴⁵ This program reaffirms the Government of Canada's commitment to promote official languages and enhance the vitality of official-language minority communities in three priority sectors: education, immigration and communities.

provide opportunities to promote Canada's history, institutions and achievements to build a sense of pride in being Canadian and offer occasions to honour and celebrate their past and to inspire their future.

4. Be fiscally responsible with taxpayers' money. And to achieve this goal, the Department will address a great number of important key management objectives with a focus on managing the stability and productivity of the Department's finances by building on the improvements that began in 2010-11 through the department-wide Transformation Initiative.

Besides, the Department will also implement a number of innovative measures and strategies to simplify, standardize and streamline its grants and contributions business processes. The growing use of technology and Canadians' expectations and hopes for fast, reliable and transparent service are the main drivers for this change.

b) -Telefilm Canada, through the Film or Video Production Services Tax Credit (PSTC), the Canadian Feature Film Fund (CFFF) and the Canadian Media Fund (CMF).

This tax credit is to promote the Canadian employment by Canadian or foreign companies with a permanent establishment in the country that produce or perform audiovisual production services. The Cavco determines eligibility and issues a production certificate of accreditation on behalf of the Ministry of Canadian Heritage. The legislation governing this tax credit is found in section 125.5 of the Income Tax Act of Canada and its regulations.

Moreover, this tax incentive is for Canadian corporations that produce videos or tapes certified as Canadian for its content. Cavco determines eligibility and issues a production certificate of accreditation on behalf of the Ministry of Canadian Heritage. The program covers up to 25 % of eligible salaries and wages, which cannot exceed 60 % of the cost of production. In total, the credit can cover up to 15 % of the cost of net production. The

legislation governing this tax credit is established in Article 125.4 of the Income Tax Act of Canada⁴⁶ and its regulations.

On the other hand, there is the Canadian Feature Film Fund (CFFF) whose main objective is to increase the audience in Canadian theaters of home movies. The programs are designed to support the development and production of Canadian feature films with strong potential of the box office. To promote diversity in the production of feature films, Telefilm Canada supports a wide range of genres and budgets of different companies and regions. Telefilm Canada also promotes partnerships among producers, exhibitors, distributors and international partners.

And at last but not least, there is the Canadian Media Fund (CMF), which is a non-profit organization that provides CAD \$ 350 million of funding each year. The purpose of the CMF is to advocate for the creation of innovative Canadian content and software applications to promote digital platforms. The assistance is done through financial support and research.

⁴⁶ An income tax shall be paid, as required by this Act, on the taxable income for each taxation year of every person resident in Canada at any time in the year.

FOURTH CHAPTER

THE CULTURAL POLITICAL OF QUEBEC: DESCRIPTION AND ITS OBJECTIVES AND MODIFICATIONS REGARDING THE FILM AND TELEVISION INDUSTRIES SINCE ITS DEVELOPMENT (1992) TO THE PRESENT.

In this chapter I will address descriptively of one of the public policies that have marked the evolution, development and progress of the audiovisual industry in the province of Quebec: The cultural policy of 1992, a policy that catapulted the province as a pioneer in the development and innovation in areas such as television, cinema, video games and animation, but most importantly, a policy that has been seen worldwide as a clear, effective, fair and equitable instrument that allows the participation of all sectors of civil society in the audiovisual field and strengthening democracy, participation and social cohesion in the region.

4.1 Historical context

To measure the impact of this policy, firstly, we should remember the context in which it arose. In the period 1990-93, the province of Quebec had gone through a theoretically self-conscious, administratively innovative, and artistically sensitive revision of its cultural policy. Already in spring 1990, the Department commissioned a study concerning the funding for arts and culture in Quebec in order to identify new avenues of funding. It was the result and consequence of increasing pressures of both the artistic and cultural communities. (Audley, 1994)

In January 1991, Liza Frulla-Hébert , new Minister of Cultural Affairs in office for only three months, had released a report entitled: Study on Financing the arts and culture in Quebec. At the same time, she announced the creation of the advisory group chaired by the late Roland Arpin, whose mandate was to formulate, at the latest by June 1991, proposals that will define the scope and content of a cultural policy in Quebec.

This double announcement during the same day was delivered in order to alleviate some fears of cultural backgrounds who saw the search for new means of financing as an excuse for the government to disengage. But in reality, the establishment of this advisory group was the opposite of disengagement as it allowed: 10 representatives from various cultural sectors to be represented on that committee; the realization of a document tabled in the National Assembly after only five months of work, that is to say, the Arpin Report, which was a major topic of press coverage and was distributed with 8,000 copies. (Audley, 1994)

Overall, the Arpin report alone is a milestone in Quebec cultural history. It follows a willingness to close consultation with the arts and culture, and it was developed in a very short period of time, which is a feat in itself for a document of this size. After the filing of this report, the Ministry undertakes the organization of work of a parliamentary committee on cultural policy. This commission was one of the biggest forums consultations ever undertaken by the Government of Quebec.

As evidence, the committee members heard a total of 181 witnesses and took notice of 264 submissions. Of these submissions, 160 came from various artistic and cultural regions, 41 from municipal and regional areas, 33 from socioeconomic and political circles, and finally 30 from media education and research. (Saint-Pierre, 2003)

Therefore, this commission was an opportunity for stakeholders from diverse backgrounds challenged by the cultural development, to formally take a position on the findings and recommendations of the Arpin report that serves as a backdrop to the hearings. (Saint-Pierre, 2003)

The cultural policy of Quebec “*Notre culture, notre avenir*”, a document of 150 pages approximately, was born on 19 April 1992. After 30 years under a model institutional inspired the French model and where the ministry is the great foreman of cultural affairs, the 1992 policy is a clear contrast and shift to a new management model.

In sum, if globally the works in the parliamentary committee would have allowed to corroborate that the Arpin report was generally well received, the exchanges would have also allowed to take the measurement of certain aspects that raise for some circles. That is why, following the hearings of the parliamentary committee and noting the positions of

different sectors, the Ministry worked actively for a full year before the adoption in June 1992 of Quebec's cultural policy by the government. (Bernard, 2007)

4.2 The content of the Policy

The three components of this policy: 1) The assertion of cultural identity, 2) Support for artists and the arts, and 3) Access and participation of citizens in cultural life, are also classic for most national cultural policies in the world. Since then, however, the cultural and social context has changed considerably, specifically the audiovisual sector, to the point that one can legitimately ask whether the time has not come to think an update of this policy

Like I mentioned previously, the purpose of this work is to analyze the cinema and television industries, and how this policy has created better ways and alternatives for all sectors of the Quebec society to get good use of it. As for these two fields, the policy contains a series of “directions” that aim to reach a number of goals that tend to strengthen social cohesion through these industries.

Direction N1. IMPROVING THE CONDITIONS OF CREATION

Behind every film and major production there is a scenario, a project which, to be as convincing as possible, must propose an original subject, believable characters, a story, a rhythm and treatment ensuring that the quality of it is like a *rendezvous*. Scriptwriting and research are really the foundation stages of any audiovisual work, hence the great care that must be granted.

This is, of course, by stimulating research and writing that are formed all sorts of original works. Writing a screenplay is, somehow and in any case, a production itself and all the people who work there or are involved in must be and feel supported, because, after all, it is an important teamwork and it requires as many resources as possible as well as appropriate management.

The writing process takes time to reach its maximum level of completion. Many versions of the same script are written before the production, and research involving different employees must be also conducted. Many people are involved in this process: first, of course, the writer and director, who sometimes are the same person, but also the producer and his team of researchers, the actors, script consultants and consultants, and the distributor.

Direction N2. SUPPORTING THE PRODUCTION OF FRENCH-SPEAKING-FILMS AND SHORT DOCUMENTARIES

In the production sector, two issues are of particular importance regarding the priorities of support from the Government of Québec, namely, on one hand, the language of shooting of featured films, central works of any national cinema, and on the other hand, support for short films and documentaries. These two genres, by their very own nature, find it difficult to get the necessary funding for their production.

This problem arises basically because of the dominance of English as the language of communication, combined with the strong presence of Hollywood cinema internationally, provide films (in the original English version) opportunities for larger markets, which facilitates their financing. Moreover, average growth budgets of Australian films (40%) and British (36%) is the almost double that of French films (18%) (Statistics Canada, 2014). Quebec English-language films also benefit from this situation, which is added to the proximity of English-language markets.

Not only productions shot in the original English version can benefit greatly, since they are aimed at several markets, the most lucrative in the world; but even countries that do not have English as official language almost naturally accept productions in English. They have, therefore, privileged access to all territories and markets. They are usually able to gather, from stage financing, guaranteed income from foreign markets.

Direction N3. TAKE THE REGIONS INTO ACCOUNT

The democratization of culture go through access to its works, dissemination and its radiation, and also by the establishment of conditions for creators and artisans to find where they live, a stimulating environment for practice of their profession. But in terms of broadcasting, public and creators from Quebec don't have the same benefits if they live near or far major centers.

Since 1997, the creation of the Ministry of Municipal Affairs, Regions and Land Occupancy⁴⁷, and the adoption of Policy support to local and regional development, the Quebec government has been working hard to encourage and support local and regional development in all its dimensions: economic, social, cultural, etc. This policy intends to be part of this effort by offering particular measures.

Direction N4. IMPROVING ACCESS TO FILM CULTURE

In recent decades, democratization has been in Quebec, as in many Western countries, an important justification for public intervention in the subject of culture and communications. This logic of action has allowed to build a network of cultural facilities, infrastructure production, communication tools and a creation and dissemination network of culture and communication throughout Quebec.

Since the adoption of the Cultural Policy of Quebec in 1992, access to citizens for art and culture is a central concern of partners, managers and administrators of cultural places, municipalities, and most importantly, the government. How can this be improved? How to create a sustainable interest for the arts and culture? This is why accessibility is a goal that has been used as an extensive reference. However, its interpretation can be quite different from one domain to another, even from one sector to another, and is defined by several dimensions, including the determination of the offer (access cultural policies highlight the objective of accessibility of the population).

The spread of commercial theater is undergoing profound transformations, chains TV are multiplying and consumption of video and DVD spreads. However, despite the

⁴⁷ The Ministry of Municipal Affairs, Regions and Land Occupancy is a government ministry in the Canadian province of Quebec. It is responsible for overseeing the provincial government's relations with all Quebec municipalities, regional governments, the metropolitan areas of Montreal and Quebec City, and the regional administration of Kativik.

proliferation of means of dissemination, the number of shares of films decreases. Within this reduced supply, the proportion of American films increases, while diminishes the prominence given to cinema from around the world.

In addition, several Québec and foreign works (non-US and from major studios) operate just outside the major centers, guard shortly poster room when they are not confined to the festival circuit. The public consultation on the cinema policy update and audiovisual production conducted in September 2002 made clear these gaps and expectations of moviegoers to an offer film that better reflects the richness of other cultures.

It is necessary to understand that real cultural issues are involved here, because as it diminishes pluralism, it also weakens cultural diversity and free access to the world's film heritage.

Direction N5. SUPPORTING THE CONSOLIDATION OF THE INDUSTRY.

The industry of film and television production in Quebec consists of about 150 companies, large and small (Investissement Québec⁴⁸, 2014). Some have assured their development through successive acquisitions or diversifying their activities, including the production of works destined for markets and foreign-funded pre-sales.

The industry also has hundreds of other specialized companies in related fields such as technical services, operation rooms, distribution, export and broadcasting. Both, by the nature of their activities and by their ability to develop, produce and distribute works for national and international markets, these companies provide a significant level of activity and create thousands of jobs in Quebec.

This industry operates in an environment where technology changes are occurring at a rapid pace. Production and post-production companies and all staff must have, for some, the resources needed to modernize their equipment; and for other, the competence and flexibility to adapt their ways of working. At the same time, the development of new

⁴⁸ Investissement Québec was created in 1998 by an Act of the National Assembly of Quebec to promote investment in Québec of international and local companies. Since its creation, it carries annually more than thousand interventions for Quebec businesses. Its head office is located in Quebec.

markets for production companies as for business services appears in this perspective as a key element to a necessary strategy for consolidation strategy.

Furthermore, it is not only the cinema and the audiovisual sector, but at the same time the cultural environment, that under the driven scanning, experiences a deep transformation of modes of creation, production and distribution. If to play a part is wanted -as important as possible: the future market for digital content and interactive- Quebec must develop a strategy for intervention in this regard.

Direction N6. IMPROVING EDUCATION OF LABOR

The industry of film and television production has created many jobs: more than 50% of production budgets consist of expenses labor Association of Film and Television Council, 2002). Under the effect of the increase in production volume in recent years, the number of jobs in the sector therefore experiences currently great growth.

Thus, a PricewaterhouseCoopers study⁴⁹, conducted on behalf of the Canadian Association for film and television (CFTPA) and the Association of Films and Television Producers (APFTQ), shows that the number of Quebec jobs doubles from 1994-1995 to 2000-2001, going from 18,000 to 36,400 jobs, which means approximately 27% of the Canadian total. This workforce performs a diverse range of activities that requires different skills equally and also a high level of qualification.

New needs are thus expressed, needs that touch directly training and development of labor. Indeed, modes of production have experienced a profound transformation with the introduction of new digital technologies. These changes come at a time where Quebec wants to give a new impetus to domestic production, while increasing its efforts to attract foreign shoots.

Direction N7. PRESERVING FILM AND TELEVISION HERITAGE OF QUEBEC

Thousands of film and television works are produced in Quebec annually. Therefore, it is important to ensure that this rich heritage is kept in the best conditions. In addition to their cultural value, works produced at this time and in the future will mean for coming

⁴⁹ Ibid.

generations as much valuable testimony on Quebec society. For proof, one only needs to think of curiosity and, in some cases, the emotion when the opportunity arises to review images that soap operas marked the beginning of Quebec television or the classics of Quebec cinematography.

Now let's consider the most important changes that have occurred since 1992 until 2002.

-The public.

Analyses conducted by the Ministry show that, in Quebec, people haven't changed their habits concerning culture as anywhere else in Canada. The attendance rate for Performing Arts, for example, remained unchanged at 46% between 1992 and 2005. The gap between Quebec and the rest of Canada has also remained roughly the same between the same two years (41% elsewhere in Canada). (Acheson & Maule, 2003)

Similarly, paying attendance at artistic presentations like painting, film, sculpture, photography, architecture, conceptual art, music, printmaking and poetry (fine arts) remained stable between 2004 and 2008, with around 7 million entries. This is an average of 12 million tickets for museums and 2 million for libraries. These figures are relatively constant.

Household spending shows that Quebec residents had spent on average US\$ 716 annually per person to their cultural consumption in 2008, placing them in the second last place among Canadian provinces (average \$ 841). These figures indicate that despite a significant financial effort, the democratization of culture remains a distant goal while about 25% of the population in Quebec, 1.7 million people, have active and diverse cultural practices. (Statistics Canada, 2014).

All researches confirm it and come to the same conclusion: artistic education still remains as a discriminating factor in many cultural practices, mainly because it is necessary to have a certain intellectual background to fully appreciate and enjoy the cultural events that province has to offer.

Second, globalization. Today, the global market has become a natural extension of the internal market for all. And as Hervé Fisher⁵⁰ indicated when he wrote for a magazine in November 2008, “*Increased trade is being at the speed of electricity*”. Which only means that because of the simultaneity and real-time operation that provides digital technology, it forces the creation of a new approach for competitive relationships.

Quebec has a great potential and can certainly hope to have a dominant position on a global scale, even if the French language does not have the same influence in the multipolar world and over economic forces (Statistics Canada, 2014). But in order to remain and exist, it must be particularly present and active. This is why most of Europe has understood that States are defined by their culture.

When the cultural sector weighs from 2 to 6% of GDP in different Western countries, according to available data; when 5.8 million jobs in Europe in 2004 depended on the cultural sector, when audiovisual products are placed on the second export economic position of the US, we see that the cultural sector, by the virtues of the market, is one of the engines of modern economies. This is why the Convention for the Protection of Cultural Expressions⁵¹, adopted by UNESCO, wants to address the subject of cultural policy (Mitchell, 2003).

Third, transformation of the social structure. The demographic profile of Quebec is every year less monolithic, especially in the Montreal area. However, this dimension does not seem to be reflected in the original cultural policy of 1992 and there is no indication that new cultural communities develop a sense of belonging or feel part of Quebec culture.

Fourth, the digital era. Digital media are fabulous tools for both cultural industries and the arts, of course, as long as we know how to use them. A major risk, however, is that of

⁵⁰ Fischer was born in 1941 in France, and is an artist-philosopher and sociologist. He graduated from the École Normale Supérieure de Paris in 1964 and defended his Master's thesis on Spinoza's political philosophy with Raymond Aron and devoted his main research to the sociology of colour. He taught the sociology of communication and culture at the Sorbonne for many years, where he was promoted to master lecturer in 1981.

⁵¹ The UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions is a binding international legal instrument adopted by the UNESCO General Conference on 20 October 2005, during the 33rd session of the UNESCO General Conference in Paris, France on 3–21 of October 2005. This convention talks about the previously established provisions of UNESCO including the Universal Declaration on Cultural Diversity of 2001.

intellectual property, and as the numbers indicate it, only in the year of 2005, there were over twenty billion illegal downloads on the planet (Mitchell, 2003).

The digital industry now forces us to think in terms of use and time rather than solely in terms of property rights, and also to realize that moral rights are being held anywhere else but here. Moreover, the digital age has introduced another important vector, the positioning of the individual, mainly because technological arts seem to rely increasingly on citizen participation. This kind of technology places the individual right at the center, where it constantly extends the possibility for the individual to take ownership of culture, to express himself in a cultural way and to create.

Fifth, culture has also become a local business. Recent figures of public funding for culture in Quebec show a significant increase in spending on culture of cities throughout the province. Therefore, culture begins to be seen more in articulation with certain social dimensions: integration of immigrants, social marginality, school dropout, tourism development, land planning, landscape protection, etc.

These findings remind us that culture not only is as a civilization value, driven by creating and maintaining lifestyle, but also a very important focus of current transformations and adjustments in the political structure with major impacts on society. And as it has been analyzed in depth throughout this study, all these elements challenge both the government and cultural backgrounds.

4.3 The future of the policy

At present, the Minister Culture and Communications of the Province of Quebec, Helen David⁵², after a credit study conducted by her department, announced the development of a brand new Quebec cultural policy that will be likely tabled in the National Assembly in 2016. The minister underlines the importance of reviewing the current policy of 1992 due

⁵² David was elected to the National Assembly of Quebec in the 2014 provincial elections. She has a PhD in clinical psychology from the Université de Montréal, and since 1984 she has been an instructor in psychopathology and women's and maternal issues, member of various university committees, overseer of psychology graduate programs, deputy director of the Department of Psychology, and vice-rector of academic affairs, international relations, and the Francophonie at the university.

to the new realities that affect the cultural sector, both financial and from the perspective of the cultural offer increasingly fragmented, and government programs.

FIFTH CHAPTER

ANALYSIS OF THE RESULTS OF THE CULTURAL POLICY OF 1992 IN THE PROVINCE QUEBEC, PARTICULARLY IN THE INDUSTRIES OF FILM AND TELEVISION, RELATED TO THE PARAMETERS OF SOCIAL COHESION.

“Social cohesion is a necessity, and mankind has never yet succeeded in enforcing cohesion by merely rational arguments.”

Bertrand Russell, A History of Western Philosophy.

To begin with, we can generally say that his policy has had visible success from several angles: a) That of supporting the creation of Quebec as a first, a vitality that is undeniable and manages to renew itself. That of the professionalization of the arts, literature and cultural industries, where the actors of these areas have achieved, with better resources and a higher degree of professionalism; and success on the international stage, thanks in particular to the woven networks and the complicity of cultural enterprises.

b) That of the establishment of various market shares and at the same time significant for Quebec's cultural production. Only a few countries of this size occupy such a cultural space within an assertive manner. One would think that the Quebec society, of 8 million people approximately, radiates in the world far beyond its demographic weight.

And lastly, c) The unraveling of a bundle of institutions and cultural facilities in the provincial territory. Moreover, the successive public programs have helped over the years the development of quality equipment in almost all regions of Quebec. These observable successes confirm that the government has led, in many ways, a true policy of the cultural offer.

Moreover, these successes of the cultural policy, combined with changes in lifestyles, in consumer spending and technological change, have shown that the cultural reality of today is not the one that prevailed in 1992. Since then, many countries have revisited in recent

years their cultural policy and more than 160 countries have felt the need to ratify to the UNESCO in October 2005 a Convention on the Protection of Cultural Expressions⁵³.

And specifically speaking, the results of this cultural policy in the industries of film and television have been positive not only for the same industries, but both have allowed the Québec society to participate more actively in various cultural programs which have provided a more evident integration, has strengthened freedom of expression, and maintained the traditions and cultures of aboriginal communities.

It is important to note that the time frame of the analysis of this cultural policy is from the year of its creation, 1992, until 2002, which means 10 years of activity of the policy with clear and productive results that embody not only the film and television industries as a whole but at the same time, and most importantly for the purpose of this work, the results that it showed towards a better social cohesion.

5. 1 There is a more evident support to the creative process in film, Television and Media Arts

The developing process of a film includes the very important factor of encouraging the emergence of a personal artistic language, where direction and creation should be primarily promoted and supported by a range of assistance programs in screenwriting, both automatic or selective, targeting creators and at the same time companies.

This goal has been reached thanks to a bonus help that was created and given to those who planned on developing film and television projects. This bonus was aimed especially to writers and directors encouraging and allowing them to enjoy better working conditions. At the same time, it helped promote the development of fiction and documentary projects as

⁵³ Convention on the Protection of Cultural Expressions

well as the development of animation projects, whose script must be in French. (Investissement Quebec, 2014).

5. 2 There is a relative increase of the quality and diversity of cinematographic and audiovisual works

For manufacturing companies, the development stage is the one that presents the most significant financial risks. Generally, the producer pays about 50% of total development cost of all its projects. If a scenario is realized, the development expenditure then becomes part of the production budget and the portion that must assume the producer corresponds to its participation in total funding. However, if a project does not materialize, the company must absorb a net loss.

The more a company develops different kind of scenarios, the greater increase of any risk. And like most of them do not have the financial resources necessary to take such risks, they are forced to be very cautious in the choice of projects to be developed. The lack of access to funding sources at this stage is such that very few manufacturing companies can afford to develop several projects or even they may need to start the production of projects that have not reached maturity.

Thanks to the policy, a new aid to business development projects was implemented in order to promote the development of concepts and projects; to encourage companies to take risks, to innovate and explore new avenues; to develop projects that will be more competitive in the local and international markets; and to reduce the financial risk companies, especially during this step. (Acheson & Maule, 2003)

5.3 There has been more promotion of the production of feature films in French

French-language films produced in Quebec have not enjoyed the same benefits as the ones that are in English. From 1990 to 2000, the average budget for a feature film initiative from Quebec and French decreased 15% from 2.4 to 2.1 million dollars, and that, despite inflation. However, Canadian production, from other provinces other than Quebec, during the same period, saw its budgets increase, as well as other national budget films: French, Italian, British and Australian films increased in effect by 18%, 34%, 35% and 40% (Statistics Canada, 2014).

Produce a feature film in French language in Quebec, before the policy, had been something difficult and financially risky at the time. It has been therefore the role of the Province to aid measures to support, through the most appropriate way possible, French projects, thus enabling designers to work in their language, to reflect the culture, values and vision of the world in their own community.

5.4 There has been more promotion of authored documentaries for television and short films.

The authored documentary⁵⁴, as it presents itself as sole or as series of prestige or multi-faceted work, is a genre of which the hourly cost means is three to six times higher than that of the conventional television set reporting. Even closer to cinema than to television, there is less demand from broadcasters whose agreement is necessary for yet provide access to public funding.

This genre is also disabled because of the scarcity of funds development, which requires extensive research and implies, more than other genres, time availability and freedom of

⁵⁴ An authored documentary is a television documentary series that presents the subjective view of its author on the topic of the documentary. This format was popularised with Kenneth Clark's landmark BBC 2 series *Civilisation*. Such was the success of this series that it led to other authored documentaries, including *The Ascent of Man*, Jacob Bronowski's partial refutation of Kenneth Clark's thesis that the major driving force of cultural evolution was the arts, not the sciences.

action. And even when it finds a distributor, this type of project benefits not a very large envelope of public funds for its production. Yet Quebec has a tradition and a well-established expertise in authored documentaries, a genre that has contributed significantly the reputation of filmmakers and cinematography. (Acheson & Maule, 2003)

As for short films, difficult to finance, both in terms of screenwriting and in the production, and difficult to distribute to the big screen, short films contain masterpieces and show real talent. The annual production volume in Quebec currently runs to twenty works on film video or animation and fiction. While for the documentary and experimental films, analog or digital video support used in almost all cases, the film is the medium used for the largest share of short animated films and fiction.

Thanks to the cultural policy, a bonus aid was created to be granted to authored documentaries for television and short films. This has facilitated the production of these genres, and also promotes the enrichment of the diversity of film genres, research and exploration. (Mitchell, 2003)

5.5 There has been more promotion of filming of Quebec productions in the regions

In a market the size of Quebec, it is inevitable that the heavy infrastructure necessary for the production, as specialized labor, focuses on the metropolis. Quebec production is therefore mainly in Montreal: since the early 90s, less than 10% of the eligible production refundable tax credit comes from outside the Montreal area. This situation can also be seen around the world, including in countries enjoying a much larger population base than Quebec. (Mitchell, 2003)

Thanks to the policy, an additional leverage for film and television productions outside Montreal was created, this was mainly to encourage Montreal producers to shoot in other Quebec regions; Stimulate hiring of designers and artisans residing throughout the territory; and to generate an already increased economic activity in the regions Quebec. However, it is important to note that the measure was aimed mainly at producers engaged outside the Montreal area. (Investissement Quebec, 2014)

5. 6 There has been more promotion of regional participation in new initiatives in the audiovisual field.

In the wake of the cultural policy of 1992, the Ministry of Culture and Communications announced its intention to harmonize and intensify its work with local and regional bodies, making this partnership a key lever of cultural development. In order to achieve this goal, new local and regional initiatives were given support in the matter of broadcasting, basically because they promoted projects on accessibility, promotion, development and production, education, or raising public awareness through cultural development agreements between local and regional entities in the implementation of initiatives.

At the same time, the Ministry of Culture and Communications promoted the establishment of local or regional development agreement which includes now a vital component on audiovisual and reserve housing for this purpose. Simultaneously, different types of projects were also designed and undertaken in this framework: broadcast, film offices, etc. (Investissement Quebec, 2014)

5.7 There has been an improvement of the marketing of Quebec films

It would be pointless to talk about marketing and access to works without mentioning the important role that distributors play. The visibility of Quebec productions on movie screens in the province is their responsibility, mainly because, in addition to program planning with exhibitors, they are also responsible in terms of the marketing and launch of filmmaking and are funding partners to different kind of projects as well.

Traditionally, the financial contribution of the Government of Québec's regarding activities of distribution is basic and marginal. It is now clear that it is necessary to improve marketing strategies through better synergy between all partners to achieve the various networks of cinemas at the right time. In order to achieve this goal, a new support program was created to promote Quebec films and, at the same time, access to a diverse film offerings displayed throughout the country. (Acheson, K. & Maule, C., 2003)

5.8 There has been more promotion of cinematographic works in the whole province.

It is on the efforts and main responsibility of all distributors, cinema operators and managers of festivals that the cinema and the production of movies policy relies on much better supporting measures in order to promote access to a cinematographic offer more diverse.

In 2001, the province of Quebec had 116 cinemas and 14 drive-in theaters, totaling 753 screens and 146,928 armchairs. Four major Canadian and American networks held about a quarter of these establishments but just over 40% of the screens (Statistics Canada, 2014). The industry experienced over the past two decades an important rationalization, where many establishments had one or a few screens, having closed their doors to be replaced by megaplexes⁵⁵. (Acheson & Maule, 2003)

Nowadays, it is easy to see that Québec Production offers a wide variety of genres and for all kinds of tastes, but the Quebec cinema, as well as the European cinema and the American cinema, sometimes struggles to find its place on displays next to the Hollywood mega-productions, especially in a context where the multiplication of distribution platforms shortens significantly the time of displaying.

This is why a support program was created in order to promote the release and copies of films, which aimed at supporting the efforts of operators for film distribution in Quebec; making available, earlier and a larger number of film copies to promote circulation in the whole planning.

⁵⁵ A megaplex makes reference to a multiplex, which is a movie theater complex with multiple screens, typically more than one screen within a single complex. They are usually housed in a specially designed building. An existing venue undergoes sometimes a renovation where the existing auditoriums are divided into smaller ones, or more auditoriums are added in an extension or expansion of the building. The biggest of these complexes can sit thousands of people and are therefore referred to as a megaplex. Canada's largest movie theaters over the years have been located in the province of Toronto.

5.9 There has been more support for education in the film and television industries

Quebec moviegoers are, in roughly equal parts, men and women. They are found in equal proportions among Francophones, Anglophones and allophones⁵⁶. Approximately 90% of youth 15-24 years are moviegoers, which constitutes almost half the public. Regarding the movie on TV, the result is the same: the younger you are, the more we look at movies on the small screen. (Mitchell, J., 2003)

The importance of young people in movies has become so obvious that the film industry now gives it special attention, including cinemas that offer a diverse range of recreational activities and fast food outlets as well. However, it is important to note that these multiplexes offer mainly American films, often as a tailor measure exclusively for young audiences.

The measures in the policy to promote diversity of supply must be accompanied by certain efforts, including developing critical thinking of young people and expand their film culture. And in order to achieve this goal it is vital to show support at school, offering to students all sorts of educational activities concerning the cinema industry.

By doing it, there has been an increase the number of students reached by the EYE cinema project⁵⁷; it has been now possible to help teachers develop educational activities related to movies, and support schools in the implementation of extracurricular activities around the film industry.

⁵⁶ In the province of Quebec, an allophone is a resident, usually an immigrant, whose mother tongue or home language is neither French nor English. The term can also be sometimes used in other parts of Canada. Note that native speakers of aboriginal languages are generally not treated as allophones. Allophones constitute an increasing part of the Quebec population and are the main source of population increase in the province, reflecting both increased levels of immigration, declining birthrates among established anglophone and francophone populations, and a shift in immigration from English-speaking countries to Asia and the Americas. (Statistics Canada, 2014).

⁵⁷ Eye cinema project, in French *Project L'OEIL CINÉMA*, is intended primarily for high school students and integrates with many of their curricula as Drama, Arts and Communications, Art, Ethics and Religious Culture, French, History and Music.

5.10 There has been more contribution to the development of new markets

The policy offered several incentives tailored to productions with real export potential. The scale of investment granted and the terms of its recovery from the revenues of markets was established on a case by case basis.

In order to reach this goal, a national strategy and implementation was developed in favor of the export of broadcasting. This way it is now possible to enhance and broaden the steps taken, including reciprocity agreements and market presence, increase export earnings, assist companies in exploiting new markets, enable the development of financing tools best suited to the context of co-production, and assess the possibility of having Montreal, on a regular basis, as an event aimed at foreign buyers. (Mitchell, 2003)

5.11 There has been an improvement of the promotion of Quebec as a filming location.

The willingness of the Government of Quebec to support the film and television industry is illustrated, among others, by the establishment of a tax measure for production services designed to promote Quebec as a location for foreign productions. This is because the government confirms and acknowledges the importance of this industry for the economic development of Quebec.

In addition to the initiatives undertaken by the offices of the film industry, many other factors contribute since recent years to an improvement of the competitiveness of Quebec: the construction of major production studios, the development of an infrastructure of technical services and, more recently, the creation of a center of expertise in computer graphics and special effects, as well as increasing the number of technical quality teams. Public consultation on updating the policy allows, moreover, to note that for many participants, the increased number and the value of foreign films in Quebec is a concern of great importance.

A foreign producer who wants to make a film in Quebec can contact several interlocutors. However, the dispersion of human resources and financial is far from being effective to

serve on this matter. Ontario and British Columbia, for example, have created their own provincial offices, which with a dozen employees and an operating budget of \$ 1.5 million, coordinate the processing of applications, and promote international markets. In fact, there are over 300 offices of that type around the world, but most countries have a promotion and central home office. In this highly competitive market, it is essential to instill a concerted drive, that supports international recognition of the Quebec expertise. This is why it is important to gather all partners around a common strategy to promote Quebec. (Investissement Quebec, 2014)

5.12 There is a skilled workforce more developed

Some Quebec universities offer now programs in the field of film and communications. The majority of these programs aim to promote theoretical learning. Graduates who wish to improve one or more aspects of the profession can also register at the National Institute of Image and Sound (*Institut National de l'image et du son*-INIS⁵⁸) that provides advanced training in film and television (screenwriting, directing and producing), and more recently, new media (content development).

In addition, there are four college programs as technical preparation⁵⁹ for professions in terms of production and film and video, and postproduction and multimedia. However, many positions are filled by graduates from one or other of the many pre-university programs (general education) with only a few film courses or communication.

At the same time, the labor market, for its part, acknowledges that there have been weaknesses concerning skills, and some companies even argue that training programs for certain specialized professions are not available in the province of Quebec, while others question the qualification of the programs and the relevance of their courses.

⁵⁸The INIS is a training institute for film, television and interactive media creation located in Montreal, Quebec. It was incorporated as a non-profit organization back in 1990 and started operations in 1996. Its location is adjacent to the Cinémathèque québécoise. As of 2002, its operating budget was reported to be \$3.2 million, with half supplied by the film industry and half from the Quebec and Canadian governments.

⁵⁹ These are the following programs: Art and Media Technology, Electronics option Audiovisual, Technical Graphics and multimedia integration.

This means that basic knowledge in the field seems deficient, more importantly in the following subjects: The organization of work, the general and artistic culture (film and art history), technical training for some positions and knowledge production. However, a diagnosis is difficult to establish, especially since there are no standards on the skills required for employment in occupations related to production, whether the positions available are technical, creative and/or administrative.

For this reason, the Amendment aims to promote a creation of studies about the need in the matter of training and formation. This way, it has been now possible to identify the needs of the labor market, establish competency profiles, determine the courses of action for review or development of training programs.

5.13 There are more and better conditions for development of workforce

Access to continuing education is of particular importance for workers in the cinema and audiovisual production. This is because it is an industry that, in fact, demands to adapt to a technological environment of constant evolution. Certainly, the need for continuing education is now a lived reality in varying degrees in all areas of the labor market. Therefore, the Quebec government has also put in place during the recent years, intervention tools to address these concerns.

Thus, under the Act to promote the development of training workforce, companies whose payroll exceeds 250,000 dollars are required to devote at least 1% of it to train their workers. Those who do not spend the amounts expected on training, have to pay a sum equivalent to *Revenu Québec*⁶⁰ that transfers it to the National Fund for the training of the workforce (FNFMO). AT the same time, member companies of the FNFMO may subsequently present training projects for their employees. And finally, in other cases,

⁶⁰ *Revenu Québec*, previously known as *Ministère du Revenu du Québec*, in French; is the department of the government of the Province of Quebec, Canada that sees to the collection of income tax and consumption taxes, while ensuring that each person pays a fair share of the financing of public services. It also administers the support-payment collection program (PAPA) in order to ensure that the support to which children and custodial parents are entitled is received on a regular basis. At the same time, *Revenu Québec* administers taxation-related social programs, as well as any other tax-collection and redistribution program entrusted to it by the government.

collection agencies can be created to collect funds from several companies and to dedicate funding for training in a same sector. (Investissement Quebec, 2014).

In order to reach this goal, a collector agency for the training purposes was established that was able to support local efforts in continuing education, facilitate the meeting of all partners involved.

5.14. There is an improvement of the translation and dubbing training offer

There are a large number of films and programs that are produced for television and a considerable amount of industrial, educational, promotional films that are translated from their original language into French. Therefore, translation and dubbing⁶¹ are an important activity for many artists and artisans.

The quality of a dubbing depends on good and exact adaptation dialogues that must ensure that the French text matches the movement the lips of the actors from the original version. The ability to write texts that are equivalent linguistically and that also meet both, the intrigue and illusion that actors we see on the screen, is a non-common talent.

Moreover, given the increase in audiovisual production the participation children, the industry tends more and more to dub the voice of children by children. The excellent results than have shown so far mean that this practice is now the norm in the entire industry. Nevertheless, it is necessary to constantly replenish a succession of children doublers/dubbers with every difficulties involved to track the most talented.

For this reason, the dubbing technique requires long training and consistent practice so that the actors have mastered the precision of synchronized flow and the adequacy and flexibility of play and expression. As for 2014, the Conservatory of Dramatic Arts in Montreal⁶² has realized the importance of this matter and is currently engaged in this path.

⁶¹ In Québec, Canada, the majority of films and TV programs in English are dubbed into Standard French, occasionally with Québec French idiosyncrasies. Occasionally, the dubbing of a series or a movie, such as *The Simpsons*, is made using the more widely spoken jòal variety of Québec French.

⁶² The *Conservatoire d'art dramatique de Montréal* (CADM) is the first public school in Quebec dedicated to the training of the actor. Since its founding in 1954, the Academy of Dramatic Arts of Montreal has trained more than 550 dramatic artists.

In order to reach this goal, a development of activities concerning dubbing training was proposed, like for example adding to the existing program a component for adapters⁶³, setting up a training component dedicated specifically to children, and finally forming and training more professionals in the discipline of dubbing.

For example, the Audio Postproduction SPR Inc., famous for dubbing many local productions, located in Montreal, was created and its core competency is mainly international dubbing at competitive and diverse rates (Canadian actors have no residual payments/rights on world-wide distributed dubbed productions), with worldwide clients across Canada, the U.S., as well as in Europe.

5. 15 Suggestions to achieve higher performance in the audiovisual market

Ensuring proper planning that is sustainable within the province of Quebec is vital, encouraging and applying all initiatives and amendments that have been exposed in this work and its relevance to realistic needs, beyond the particular objectives of the companies or institutions. At the same time, the training in the audiovisual sector is a strategic topic, therefore a plan is also required in the medium term with realistic and plausible goals that can be adapted to the different generations of professionals to new demands.

It is also necessary to establish clear selection criteria so that, on one hand, employed and unemployed workers do not mix in the same training course and, secondly, to ensure that most members have a homogeneous level. Both issues will contribute to improving the effectiveness and certainly taking advantage of each course.

In the field of training, it is important to properly identify topics of interest. Plans and training courses should take into account the criteria and the relationship of the profiles to enhance as well as the training needs of area knowledge and materials so the adaptation to new technologies is presented also as a key element.

Moreover, it is necessary to continue to promote the development of agreements with associations of audiovisual producers in order to better meet demand and reality of different

⁶³ Adding a shutter to the adapter and a component for children has proved to enrich and complement the training already recognized and supported by the movie and audiovisual sector.

aspects of the market (such as technology, areas, programs, professional profiles, etc.), updating plans and training programs and make appropriate corrections in professional practice to make them a truly effective tool.

And finally, it is necessary to facilitate the presence of top-level figures (such as organizing conferences or seminars) in the training plans, that give prestige to teaching, multiply people's interests and ensure the presence of students. For this it is important to have a modern training system that creates spots of creativity developing projects.

As it has been shown and explained throughout this work, the training in the audiovisual sector is a key element, and as long as the Province of Quebec continues to neutralize its weaknesses and adapt to the real needs and new market conditions as they have been doing it for the last decade, they will continue to improve decisively their prospects and competitiveness in the audiovisual industry.

CONCLUSION

The audiovisual sector is currently undergoing a period of radical change that is causing a structural crisis, exacerbated by the globally negative economic situation. However, in this environment full of uncertainties, the audiovisual industry is perceived and consolidated as an activity with high growth potential and is still considered one of the models with fundamental drivers of the new economy.

The audiovisual production in Canada is currently experiencing a period of transformation, of redefinition. And this is not just as a result of the ongoing technological revolution, but at the same time as a consequence of the inherent economic and financial circumstances, to demographic changes across the country, and above all, changes in tastes and consumption habits of the population.

Through the description and analysis of this paper, it is possible now to reach several conclusions that can be grouped into three important premises: The first premise is that thanks to the policy there is a solid establishment of various market shares and at the same time significant for Quebec's cultural production.

Only a few countries of this size occupy such a cultural space within an assertive manner. One would think that the Quebec society, of 8 million people approximately, radiates in the world far beyond its demographic weight. Therefore, the results of this cultural policy, regarding in the industries of film and television, have been positive not only for the same industries, but at the same time it has allowed the Québec society to participate more actively in various cultural programs and thus providing a more evident integration. It has strengthened freedom of expression and maintained the traditions and cultures of aboriginal communities

Nowadays, it is easy to see that Québec Production offers a wide variety of genres and for all kinds of tastes, but the Quebec cinema, as well as the European cinema and the American cinema, sometimes struggles to find its place on displays next to the Hollywood

mega-productions, especially in a context where the multiplication of distribution platforms shortens significantly the time of displaying.

This policy has no boundaries of background, origin or opinions; and is addressed universally to those who make part of the film and television market within the French speaking province of Quebec, as well as those who are devoted, have a passion for it or simply enjoy it as a hobby.

And now what is needed is that need those who have the responsibility of taking part for the film development find within this policy and the plan of action that comes with it, all kind of answers to their concerns and, most importantly, so they will draw motivation again for the development and deepening of their art.

To better bring Quebec into the screen, it is hoped that all movies and TV shows created in the province, will be among the best ambassadors of the culture of Quebec, and will radiate much more widely at home in the first place, but also abroad. It is still necessary to do more in order to show everything the world should know about Quebec and its people, by offering works of great quality and originality that showcase the talent of the artists and creators.

Thanks to the policy, an additional leverage for film and television productions outside Montreal was created, this was mainly to encourage Montreal producers to shoot in other Quebec regions; Stimulate hiring of designers and artisans residing throughout the territory; and to generate an already increased economic activity in the regions Quebec. However, it is important to note that the measure was aimed mainly at producers engaged outside the Montreal area.

The second premise of these conclusions is that this policy established a professionalization of the arts, literature and cultural industries, where the actors of these areas have achieved, with better resources and a higher degree of professionalism; and success on the international stage, thanks in particular to the woven networks and the complicity of cultural enterprises.

The audiovisual sector is a very strategic one, and therefore, its training and education reach an indisputable value. And since this is a sector that is in constant change, both in content and in the modes of production and distribution in today's technological environment, the tools that are used in the audiovisual industry and the skills to use them vary extremely rapidly.

There is an evident and strong support for development of concepts and projects; to encourage companies to take risks, to innovate and explore new avenues; to develop projects that will be more competitive in the local and international markets; and to reduce the financial risk companies, especially during this step

That's why all these changes have influenced so much on the development of the audiovisual production to the point that professionals and companies that do not spend a significant portion of their time to training take a huge risk and face to lose update in a relatively short period. Therefore, learning and training are elements in this industry that are and should be permanent and lifelong.

And lastly, the third and final premise of these conclusions is that the successive public programs created and implemented through the policy have helped over the years the development of quality equipment in almost all regions of Quebec. These observable successes confirm that the government has led, in many ways, a true policy of the cultural offer.

Traditionally, the financial contribution of the Government of Québec's regarding activities of distribution is basic and marginal. It is now clear that it is necessary to improve marketing strategies through better synergy between all partners to achieve the various networks of cinemas at the right time.

Moreover, these successes of the cultural policy, combined with changes in lifestyles, in consumer spending and technological change, have shown that the cultural reality of today is not the one that prevailed in 1992. Since then, many countries have revisited in recent

years their cultural policy and more than 160 countries have felt the need to ratify to the UNESCO in October 2005 a Convention on the Protection of Cultural Expressions⁶⁴.

This work is not intended that other regions in the world make a copy and an irresponsible implementation of this cultural policy. The Québec Policy has guided so far the action of the Government of Quebec. It was developed through a consultative process that involved about fifty professionals and specialists. Their substantial reports have led to better identify the emerging issues and outline courses of action in response to the various questions facing the film sector and audiovisual production. Subsequently, organizations and associations and citizens presented their views at a public consultation.

This policy is characteristic of the Québec society and for themselves. Like any other public policy of any size, it is necessary to make a comprehensive study on the needs of the citizens, the priorities of society in question and the benefits that it can provide to future generations.

The seven directions outlined in the policy have found their practical application in a series of measures. Several of them have been designed to creators, others to companies and also the public. At the same time, this policy has proven to be an updating engine as its policies and objectives have been subjected to revision every five years, and all its actions are regularly evaluated, which shows that should new measures be needed, they must be part of the proposed action plan.

⁶⁴ Convention on the Protection of Cultural Expressions

ANNEXES

Annex N. 1

Countries that have signed an audiovisual coproduction treaty with Canada

Canada has audiovisual coproduction treaties and MOUs ⁶⁵with 54 countries in order to outline their respective obligations and commitments with regard to an audiovisual coproduction. Canada administers the treaties and MOUs with the following countries on behalf of the Government of Canada:

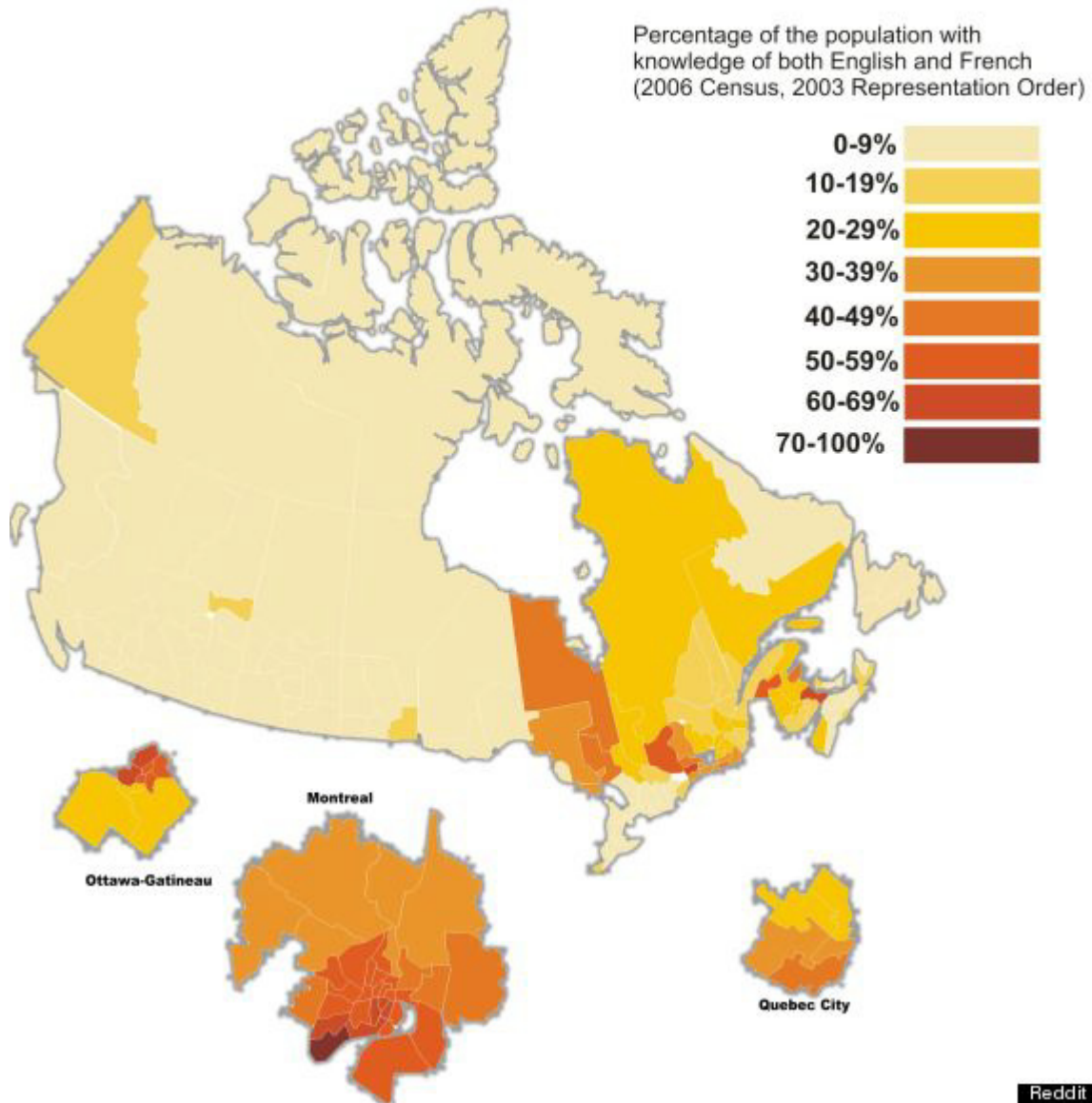
Algeria	Greece	Russian Federation
Argentina	Hong Kong	Senegal
Australia	Hungary	Singapore
Austria	Iceland	Slovak Republic
Belgium	India	Slovenia
Bosnia-Herzegovina	Ireland	South Africa
Brazil	Israel	South Korea
Bulgaria	Italy	Spain
Chila	Japan	Sweden
China	Latvia	Switzerland
Colombia	Luxembourg	United Kingdom
Croatia	Macedonia	Uruguay
Cuba	Malta	Venezuela
Czech Republic	Mexico	Yugoslavia (Serbia and Montenegro)
Denmark	Morocco	
Estonia	Netherlands	
Finland	New Zealand	
France (Cinema)	Norway	
France (Television)	Republic of the Philippines	
France (Mini-treaties)	Poland	
Germany	Romania	

Source: <http://www.telefilm.ca/en/coproductions/coproductions/agreements>

⁶⁵ A memorandum of understanding (MOU) describes a bilateral or multilateral agreement between two or more parties. It makes reference to a convergence of will between the parties, indicating an intended common line of action. It is regularly used in cases where parties either do not imply a legal commitment or in situations where the parties cannot create a legally enforceable agreement.

Annex N. 2

Bilingualism in Canada



Source: http://www.reddit.com/r/canada/comments/1r3ose/bilingualism_in_canada_map/

ANNEX N. 3

Official Languages in Canada in 2006

	French Speaking Population	English Speaking Population
Newfoundland and Labrador	1 933 (0,4%)	497 913 (99,5%)
Prince Edward Island	5 133 (3,8%)	129 028 (96,1%)
Nova Scotia	32 225 (3,6%)	869 565 (96,3%)
New Brunswick	235 128 (32,7%)	483 843 (67,2%)
Quebec	6 373 228 (85,6%)	994 723 (13,4%)
Ontario	537 595 (4,5%)	11 230 380 (93,4%)
Manitoba	43 118 (3,8%)	1 080 228 (95,3%)
Saskatchewan	14 850 (1,6%)	935 870 (98,1%)
Alberta	62 785 (1,9%)	3 154 385 (96,9%)
British Columbia	61 735 (1,5%)	3 891 890 (95,5%)
Yukon	1 185 (3,9%)	28 890 (95,7%)

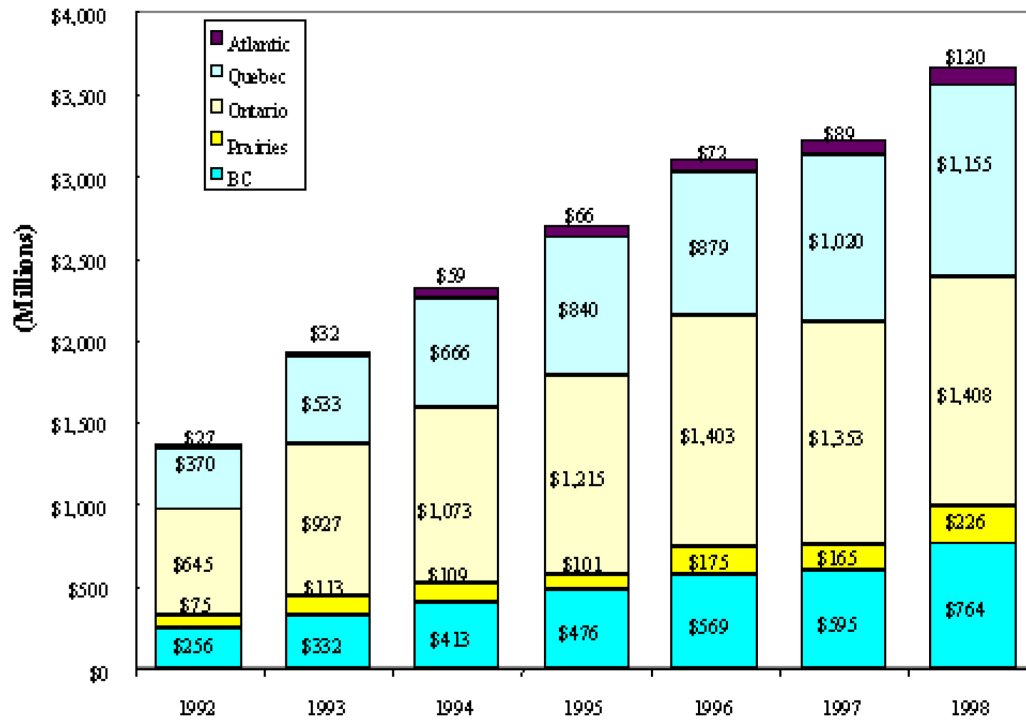
Northwest Territories	1 005 (2,4%)	39 730 (96,8%)
Nunavut	425 (1,4%)	26 615 (90,7%)
Canada	7 370 343 (23,6%)	23 363 058 (74,8%)

Note : French and English speaking populations have been calculated using the Official Languages Regulations definition of "First Official Language Spoken".

Source : Canadian Heritage, 2008. Based on the 2006 Census Data, Statistics Canada, 20% Sample

ANNEX N. 4

**National Total Production Volume By Region
Domestic and Foreign Combined**



Source: <http://www.randyfinch.com/2013/01/why-has-film-production-in-vancouver.html>

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3. Italienisch : Sehr gut.	