



OBSERVATOIRE EUROPÉEN DE L'AUDIOVISUEL
EUROPEAN AUDIOVISUAL OBSERVATORY
EUROPÄISCHE AUDIOVISUELLE INFORMATIONSTELLE

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**IMPACT OF THE DIRECTIVE TELEVISION WITHOUT
FRONTIERS ON THE CIRCULATION OF
AUDIOVISUAL WORKS IN THE EUROPEAN UNION**

(BRUSSELS, 29 MAY 2001)

<http://www.obs.coe.int>

This presentation is the first contribution of the European Audiovisual Observatory to the process of evaluation of the efficiency of the mechanisms of the Directive Television without Frontiers launched by the European Commission.

It has been presented in the workshop organised in Brussels (29 May 2001) by the Cabinet Uyttendaele-Doutrelepont, in charge of one of the evaluation study launched by the Commissio

(<http://www.doutrelepont.be/news/euro/europage.html>)

It should be noted that the European Audiovisual Observatory is not in charge of the evaluation of the Directive. This contribution is only provided as element for the debates. The statistics published by the Observatory do not necessarily follow the legal definitions provided by the Directive.

OBSTACLES TO TRANSPARENCY AND COMPARABILITY OF THE EUROPEAN AUDIOVISUAL WORKS MARKET

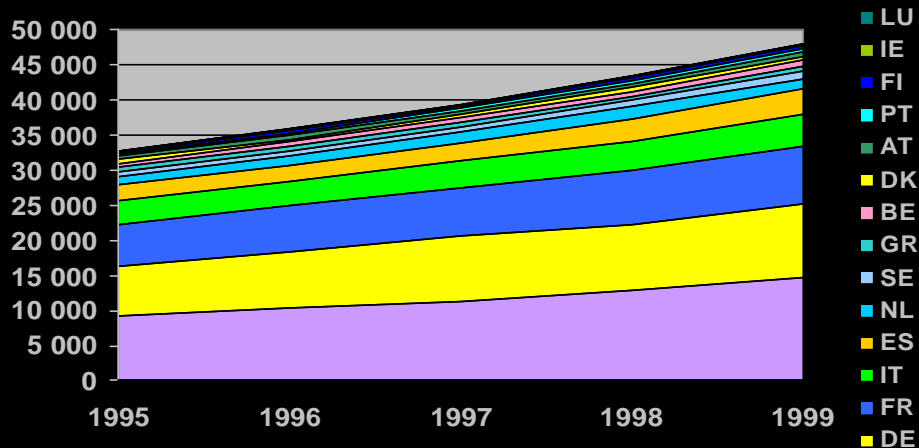
- **GROWING COMPLEXITY OF THE NATIONAL TELEVISION SYSTEMS**
- **INCREASE OF THE NUMBER OF TV CHANNELS**
- **GROWING IMPORTANCE OF TRANSFRONTIER TELEVISION**
- **IMPORTANT DIFFERENCES IN THE NATIONAL LEGISLATIONS ON OBLIGATION OF PUBLICATIONS OF ACCOUNTS BY COMPANIES**
- **ABSENCE OF DATA BASES ON PROGRAMMES BY GENRES**
- **PROBLEMS OF DEFINITIONS (nationality, film/TV films, genres,...)**
- **OPACITY OF THE RIGHTS MARKET**

More detailed information on methodology and data can be found in the various publications of the Observatory, or publications of its partners organisations. See : <http://www.obs.coe.int>

REVENUES OF TV COMPANIES IN THE EUROPEAN UNION

(in millions EUR) *Growth 1999/1995 : 46,3 %*

Source : European Audiovisual Observatory

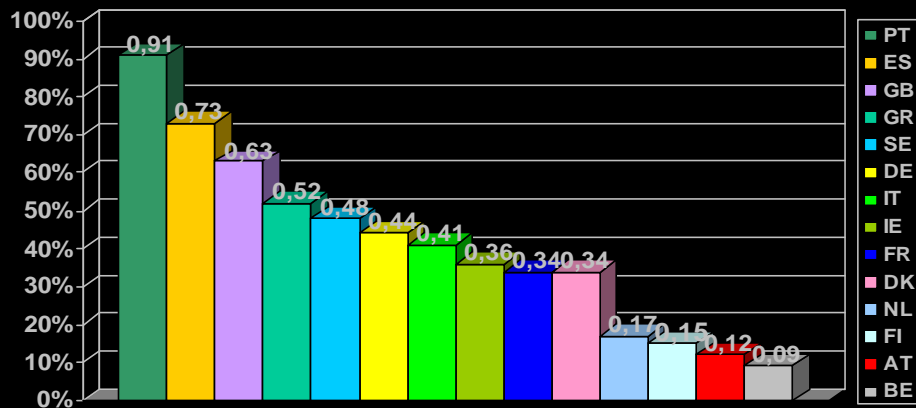


The data is based on an almost comprehensive database of TV company revenues. Radio revenues of public service companies (such as BBC, ARD, RAI, ...) have been estimated and eliminated from the total.

Revenues of companies providing transfrontier television channels have been accounted for in the country of establishment of the company (e.g. VT-4 Ltd revenues are taken into account under GB and not under BE).

GROWTH OF TV COMPANIES REVENUES BY COUNTRY 1999/1995 (in %)

Source : European Audiovisual Observatory



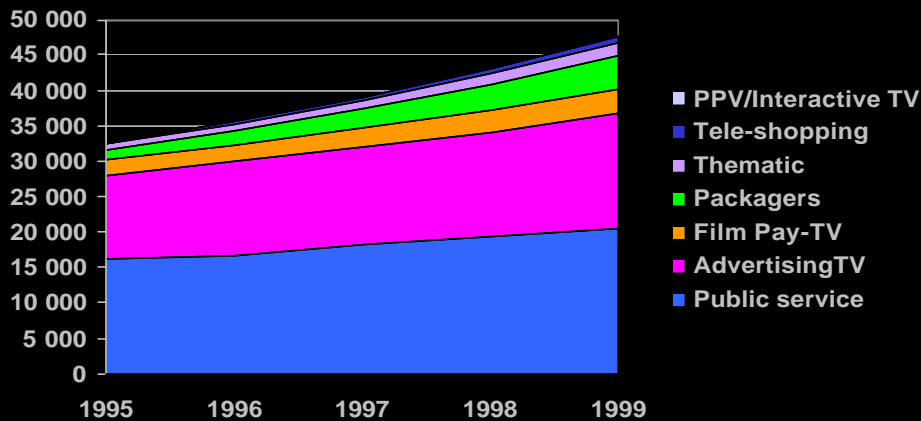
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REVENUES OF THE VARIOUS KIND OF TV COMPANIES (1995-1999)

Millions EUR

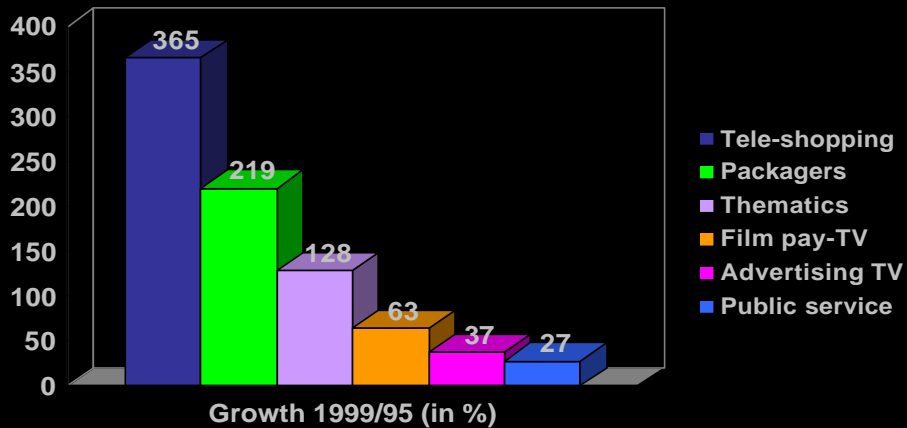
Source : European Audiovisual Observatory



The Pay-Per-View/Interactive category does not include the revenues of some important PPV or interactive services where information is not available (e.g. Multivision in France) or where turnover is included in the "packagers" revenues (e.g. the Pay-Per-View services section of the BSkyB package).

RATE OF GROWTH 1999/1995 OF THE VARIOUS KIND OF TV COMPANIES (in %)

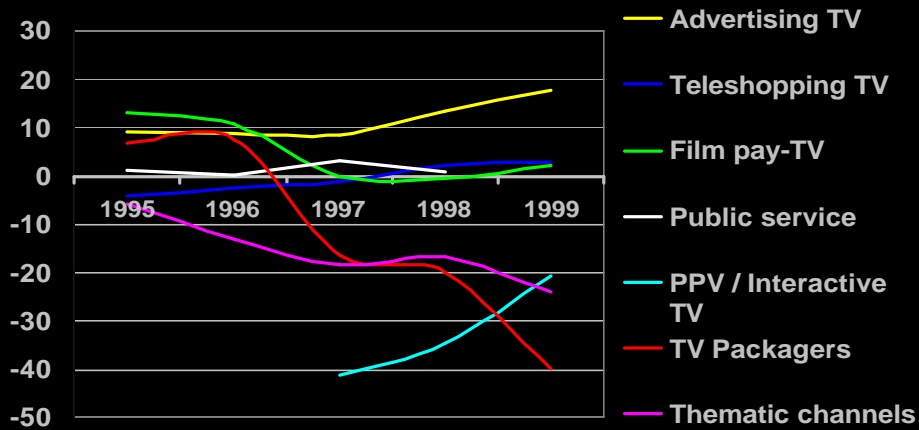
Source : European Audiovisual Observatory



The Pay-Per-View/Interactive category does not include the revenues of some important PPV or interactive services where information is not available (e.g. Multivision in France) or where turnover is included in the "packagers" revenues (e.g. the Pay-Per-View services section of the BSkyB package).

PROFIT MARGIN OF TELEVISION COMPANIES (1995-1999) (in %)

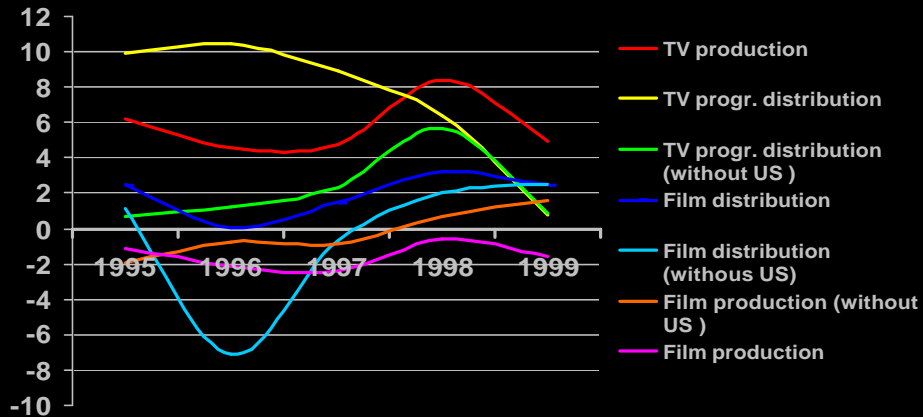
Source : European Audiovisual Observatory



The calculations have been made using the available accounts of a significant sample of companies (chiefly available through the AMADEUS database published by the Bureau Van Dijk). The main area of incomplete information is in relation to German companies, for whom detailed financial information is generally not available.

PROFIT MARGIN OF AUDIOVISUAL COMPANIES IN EUROPEAN UNION (1995-1999) (in %)

Source : European Audiovisual Observatory

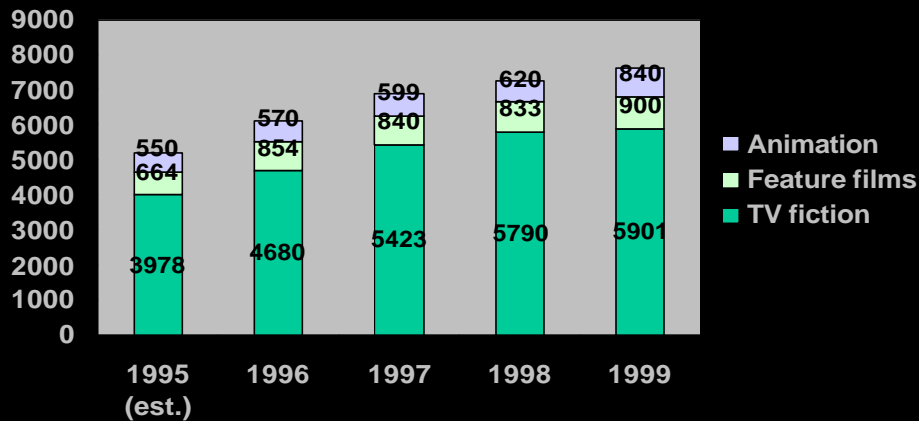


The calculations have been made using the available accounts of a significant sample of companies (chiefly available through the AMADEUS database published by the Bureau Van Dijk). The main area of incomplete information is in relation to German companies, for whom detailed financial information is generally not available.

PRODUCTION OF FEATURE FILM, TV FICTION AND ANIMATION PRODUCTION IN EUROPEAN UNION (in hours)

Growth 1999/1995 : + 47 %

Source : European Audiovisual Observatory



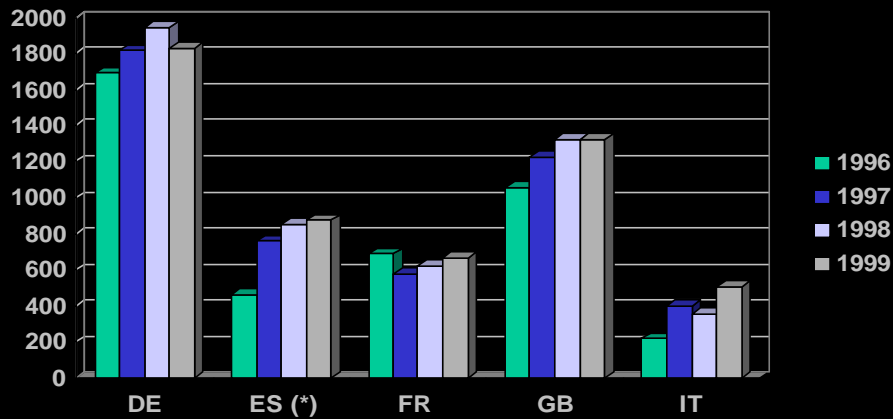
The estimation of the number of hours of TV fiction produced in the European Union has been estimated from data available in the Eurofiction report on the 5 major producers (DE, ES, FR, GB, IT)..

The estimation of the number of hours of feature films produced in the European Union is based on the conventional length of 90 minutes by feature film. Detailed information on the number of feature films produced may be found in the *Statistical Yearbook* published by the Observatory.

The number of hours of animation is an estimate by Screen Digest based on CARTOON's data.

PRODUCTION OF NATIONAL TV FICTION BY THE 5 MAJOR E.U. COUNTRIES (1996-1999) (in hours)

Source : Eurofiction

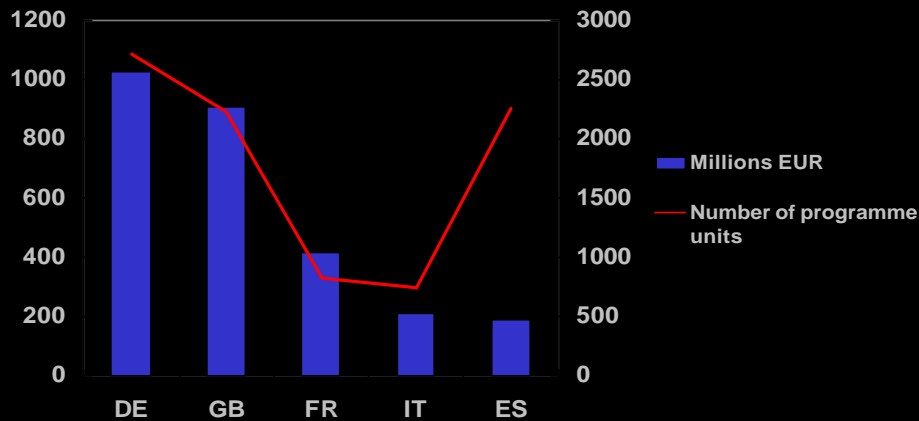


The EUROFICTION report, edited by Prof Milly Buonanno, is published every year by the European Audiovisual Observatory :

http://www.obs.coe.int/oea_publ/eurofic/index.html.en

COMPARAISON BETWEEN FINANCIAL VALUE OF NATIONAL FICTION AND NUMBER OF PROGRAMME UNITS (1999)

Source : INA

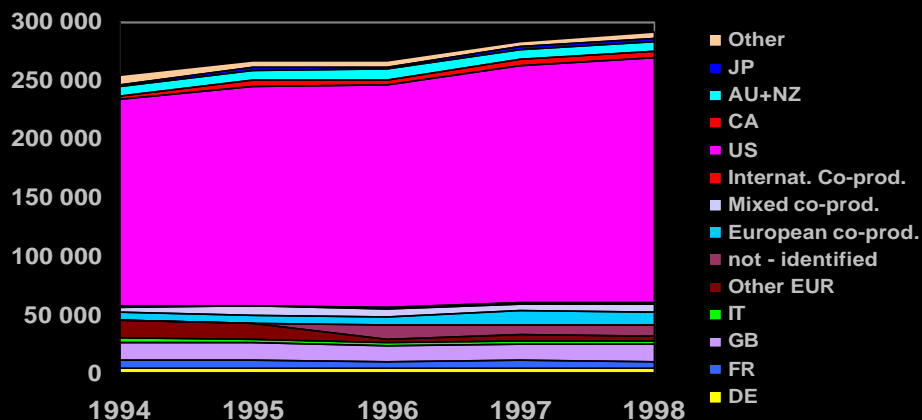


Detailed methodological information may be found in the INA Study "Economy of TV Fiction in Europe", published by the Observatory in October 2001; the Executive Summary of the study is available on the Observatory web site.

http://www.obs.coe.int/about/oea/pr/tv_fictionandeconomy.pdf.en

ORIGIN OF IMPORTED FICTION (FEATURE FILMS + TV FICTION) BY THE 100 LEADING TV CHANNELS IN THE EUROPEAN UNION

Source : ETS / OBS

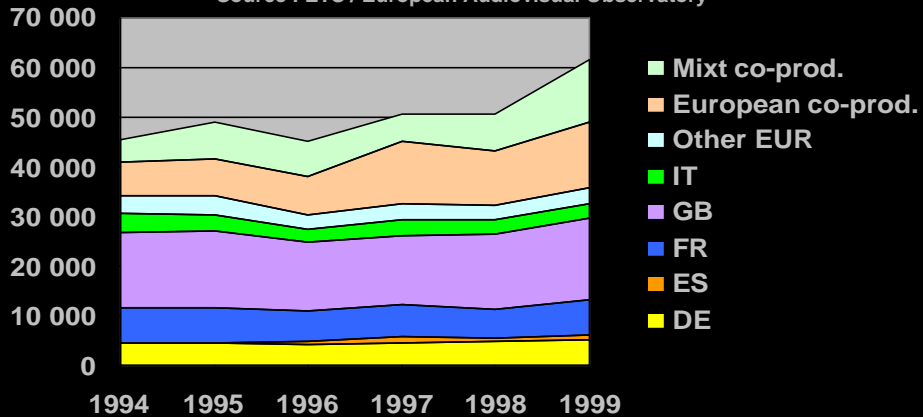


The detailed information, provided by Essential Television Statistics (ETS), is available, channel by channel, in the *Statistical Yearbook* published by the Observatory.

NUMBER OF EUROPEAN NOT-NATIONAL FICTION HOURS (feature film + TV fiction) BROADCAST BY THE 100 LEADING CHANNELS IN EUROPEAN UNION

Growth 1999/1995 : 17,2 %

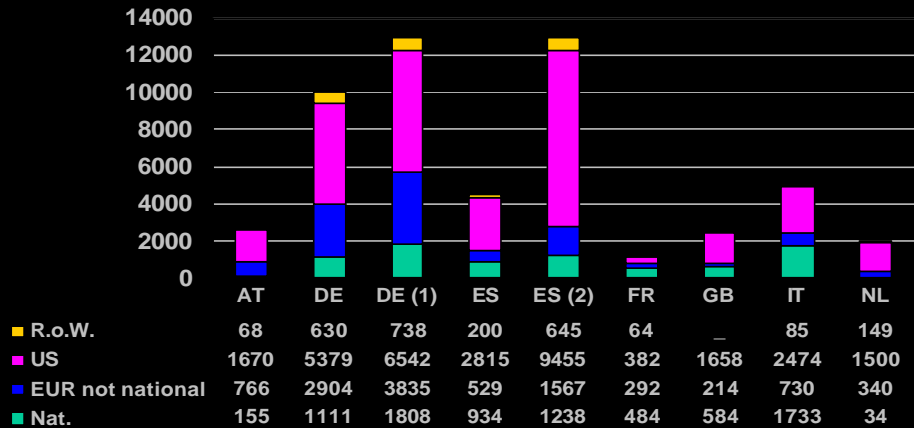
Source : ETS / European Audiovisual Observatory



The detailed information, provided by Essential Television Statistics (ETS), is available, channel by channel, in the Statistical Yearbook published by the Observatory.

NUMBER AND ORIGIN OF FEATURE FILMS BROADCAST BY UNENCRYPTED TV CHANNELS (1998)

Source :European Audiovisual Observatory



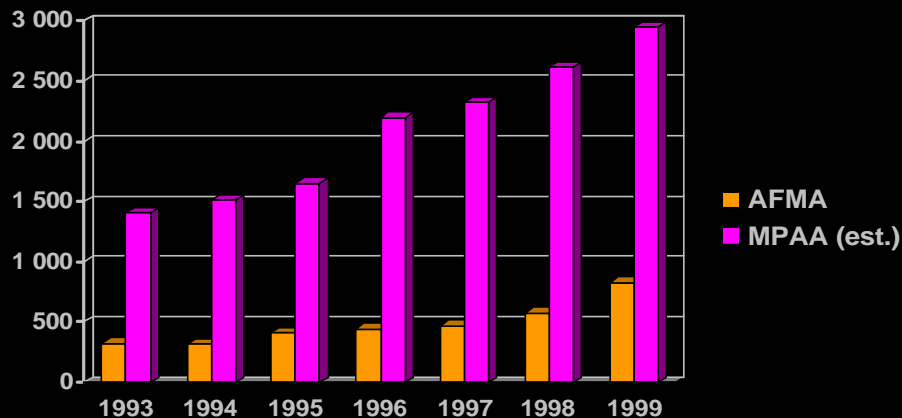
Detailed information may be found in the study "European films on European television" published by the Observatory in February 2000 and available on its web site:

http://www.obs.coe.int/online_publication/reports/films_in_tv.html

TV PROGRAMMES SALES BY US COMPANIES IN EUROPEAN UNION (in millions USD)

Growth 1999/95 : + 83 % in USD or + 119 % in EUR

Source : European Audiovisual Observatory



Detailed information on AFMA Members sales may be found on AFMA web site (<http://www.afma.com>) It should be noted that AFMA includes some European companies.

MPA Members revenues are estimates proposed by the Observatory. Up until now, the MPA has not made available officially its figures.