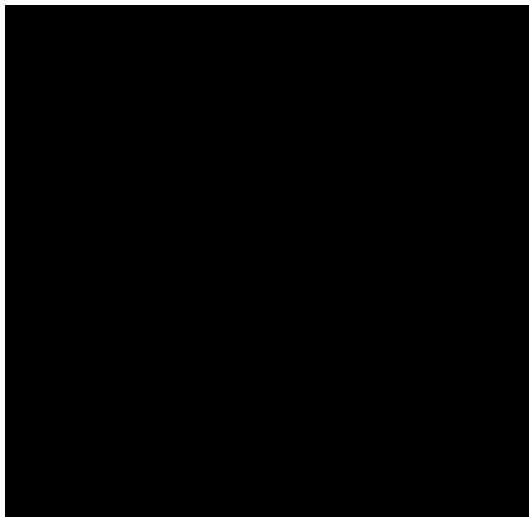




FRENCH DOCUMENTARY MARKET

**PRESENTATION FOR
INTERNATIONAL CO-PRODUCION WORKSHOP
RIO DE JANEIRO SEPTEMBER 26-27 2008**



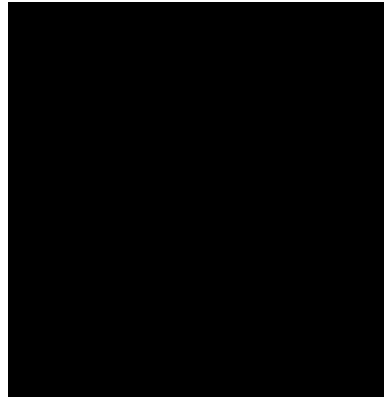
The association of French television program exporters :

- promotes the sale of French Television programs worldwide and facilitates international coproduction.
- includes around 160 member companies which account for over 85 % of all French exports, such as producers, distributors and the distribution of French broadcasters.

Find all the French TV catalogues, all the French producers and distributors, as well as a directory of the French broadcasting industry, under one roof at

www.tvfrance-intl.com

Contact : Mathieu Bejot, executive director



Association Sciences and Television

- a group of **66 independent producers** working in **39 different production companies**. These companies produce films in all genres (cinema and TV fiction, documentaries, magazines, reports, animation) and a large portion of their output is devoted to scientific productions. Together, they produce the vast majority of scientific programming broadcast on television in France (as well as much further abroad).
- AST was created in 2001 and is supported and sponsored by the French Ministry of Research, Ministry of Culture, the CNC and Procirep.
- Master classes and breakfast meetings with guest speakers from the world of science or television are held regularly.
- The association organizes a science film festival every year in paris : **PARISCIENCE**.
- Contact : Jean-Pierre Gibrat, President. www.science-television.com www.pariscience.fr

FRENCH DOCUMENTARY MARKET OVERVIEW

- **Average volume : 2.000 h produced per year (2007)**
 - Social issues : 55%, Environment & Nature: 22%, History & Science: 17%, Culture & Music: 6%
 - 100 % produced by independents (no inhouse production)
 - 500 independent producers in France.
 - 50 big ones.
- **Average budget per hour (documentaries produced for terrestrial broadcasters : 210.000 € (= 310.000 US \$))**

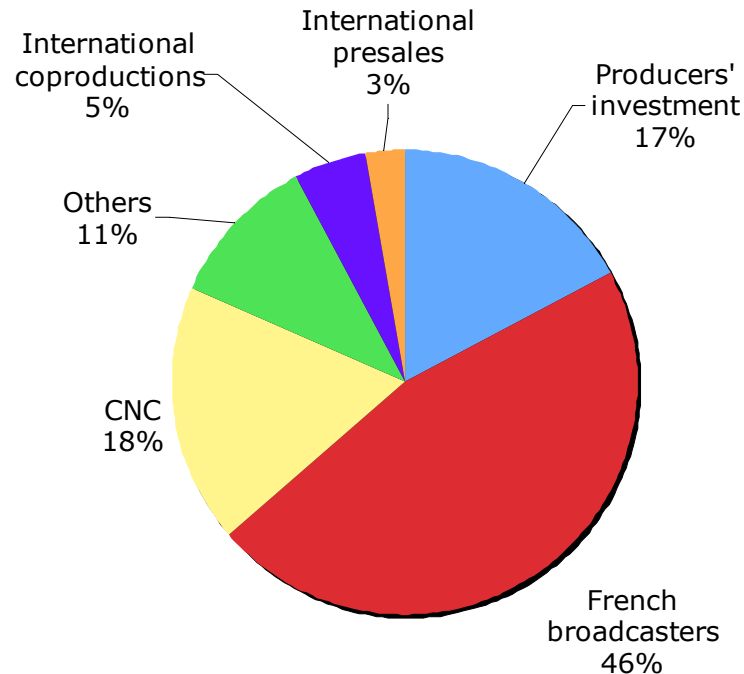
Average documentary funding sources:

	M. €	M. US\$	%
Producers' investment	55,5	82,1	17,3%
French broadcasters	148,8	220,2	46,4%
CNC	58,4	86,4	18,2%
Others *	34,1	50,5	10,7%
French Funding	296,7	439,1	92,4%
International coproductions	12,3	18,2	4,8%
International presales	6,5	9,5	2,8%
International Funding	18,8	27,7	7,6%
Total funding	315,5	466,8	100,00%

* Other sources of funding :

- Ministry subsidies / Scientific Institutions (10 000 € average)
- Regional Subsidies if local subject & expenses (7 - 25 000 €)
- Procirep / Angoa (10 to 15 000 € average)
- MEDIA (if majority European) : up to 300 000 €, max 20 % of budget

Average documentary funding sources:



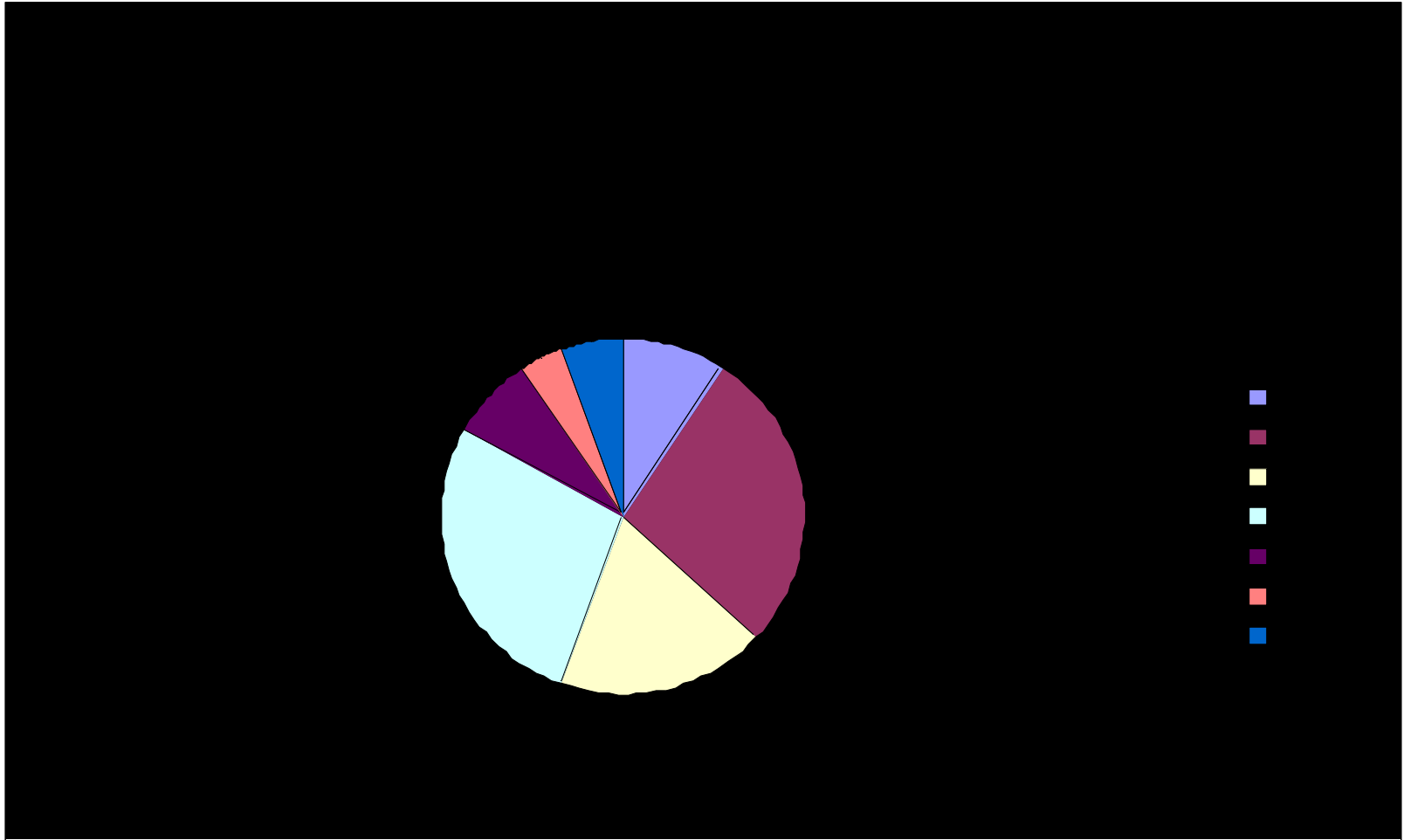
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Documentary commissions from terrestrial broadcasters

	Hours as first run	Investment (M€)**	Average Cost per hour (K€)*	Average Input per hour (K€)*	Funding ratio (%)*
France 2	96	13,7	276,7	139,9	50,6
France 3 National	172	20,7	225,9	115,3	51,1
France 3 Régional	194	11,8	144,9	56,7	39,1
France 3 Total	366	32,5	182,9	84,3	46,1
France 5	260	24,4	187,2	85,9	45,9
Arte	296	29,2	233,3	97,6	41,8
TF1	55	10,2	262,1	181,2	69,2
M6	62	6,0	150,6	95,7	63,5
Canal+	87	10,1	240,5	114,7	47,7
total	1 221	126,1	209,5	99,3	47,4

Documentary commissions from terrestrial broadcasters



French international documentary coproductions

- **Around 367 hours** coproduced in 2007 (official coproductions = qualifying for CNC subsidies)
- International funding : **18,8 M€** in 2007 (coproduction 12,3 M€, presales 6,5 M€)
- French majority coproductions : **352 hours**, total value 75,9 M€. International investments bring 9,6 M€, = 12,5 % of the budgets. Main partners : Canada / USA / Belgium / Australia / Germany
- Minority French coproductions : **15 hours**. Total budgets : 6,1 M€
 - International funding : 3,7 M€.
 - French funding : 2,4 M€.

- **Why coproducing with French independents ?**

- Maximizing funding from French broadcasters, access to CNC and other sources of funding,
- Access to creative resources in France and in Europe (crews, CGI, scientists, historians...)
- Access to European and International co-funding

- **How to coproduce with France ?**

French qualification certified by CNC if

- at least 30 % of the film's finance plan come from France
- at least 30 % of production expenses done in France
- the film matches some creative points in France (key staff : director, writer, DOP, Sound Engineer, Music,... : 9 points out of 14)

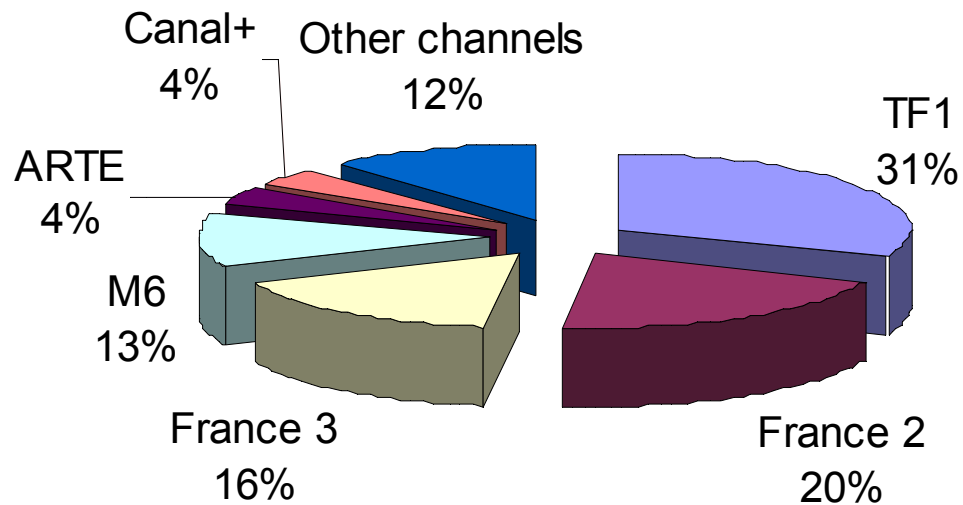
French broadcast market overview

Terrestrial analog channels : 6 channels (received by 56,7 Million individuals)

- **TF1 (private)**
- **FRANCE 2 (public)**
- **FRANCE 3 (public)**
- **CANAL+ (private, Pay TV, scrambled)**
- **FRANCE 5 (public, daytime) / ARTE (public, night time)**
- **M6 (private)**

French broadcast market overview

Audience shares of French TV stations



Terrestrial Digital Channels : 17 channels (received by 11,6 Million individuals)

All supports : Analog Terrestrial / Digital Terrestrial / Digital Cable, Satellite, ADSL 81,8 %

- TF1 Market share : 31,8 %
- FRANCE 2 Market share : 16,9 %
- FRANCE 3 Market share : 13,3 %
- M6 Market share : 11,6 %
- CANAL+ (Pay TV, scrambled) Market share : 3,3 %
- FRANCE 5 (full day & night) Market share : 3,1 %
- ARTE (full day & night) Market share : 1,8 %

Only Digital terrestrial / Digital Cable, Satellite, ADSL 6 %

- TMC Market share : 1,2 %
- W9 Market share : 1,1 %
- GULLI Market share : 0,9 %
- NT1 Market share : 0,7 %
- France 4 Market share : 0,5 %
- NRJ12 Market share : 0,4 %
- €PE2 TV Market share : 0,4 %
- Direct8 Market share : 0,3 %
- I>TELE Market share : 0,3 %
- BFM TV Market share : 0,2 %

Other cable, satellite, ADSL digital channels Market share : 12,2 %

Cable – Satellite – DSL Channels : more than 200 French channels (received by 16,5 Million individuals)

Among which some documentary channels :

- **PLANETE, PLANETE JUNIOR, PLANETE THALASSA, PLANETE JUSTICE SEASONS (CANAL PLUS GROUP)**
- **ODYSSEE, USHUAIA TV, HISTOIRE (TF1 GROUP)**
- **VOYAGE, NATIONAL GEOGRAPHIC FRANCE (FOX Group)**
- **DISCOVERY, DISCOVERY REALTIME**
- **13EME RUE (NBC UNIVERSAL)**
- **CUISINE TV**

**=> All mostly do acquisitions (approx 3 000 to 6 000 € per hour).
Max amount for coproductions with French producers only :
10 000 to 25 000 € per hour.
Possible as second window but more and more difficult**

France 2

- Profile : generalist channel, public, funded by tax (redevance) and advertising

Until end of 2008

- Average market share : 16,9 % (20 % in analog measures)

Documentary Unit :

- **Patricia Boutinard-Rouelle, head of documentaries and magazines unit (WCSFP)**
- **Dana Hastier, head of documentaries**
- **Clémence Coppey, CE documentaries - History (WCSFP)**
- **Caroline Glorion, CE documentaries – Science**
- **Anne Roucan, CE documentaries – Current affairs**

France 2

Documentary strands :

- **“Infrarouge”, 52 mn (up to 90 mn), one offs, weekly, Thursday 22.30 (late night)**
 - French Current affairs and Social issues mainly. Some science and health, some history. One offs, no series.
 - Has to be close to viewer’s everyday’s life.
 - Ex. in science / health : face transplant.
 - Ex. in history : recent history with a POV : A women in Berlin during WW2’s diary
 - Very few foreign acquisitions and preacquisitions.
Exception: Darlow Smithson’s ***Kamikaze***.
 - Average number of programs commissioned per year :
12-15 History, 5-10 Health, Environment and Science
 - Average license fee for French commissions : 120-180 K €

France 2

Documentary strands :

- ***Prime time specials : History, Science (90-110mn)***

- One prime time per month / 10 per year. Only commissions
- Project by project basis, so far 70/30 ratio History vs Science
 - **History** : Archive based recent history (XXth century) with a special POV, new angle, new historical approach of the subject matter. No historian on screen, only archives / re-enactment or testimonies of characters.
 - Ex. World War 1 project, showing a real implication of the population supporting the war, based on a women historian's recent work (Annette Becker)
 - Ex. The last 3 years of Marilyn Monroe, through her psychanalyst
 - Docu-drama : contemporary and ancient history
 - Ex. ***History of the Resistance*** (2 x 110 mn France 2, 4 x 52 France 5)
 - Ex. ***Rise of man*** (after ***Species' Odyssey*** and ***Homo Sapiens***)
 - Ex. ***Versailles***
 - **Science** : must be spectacular !!
 - Ex. ***Life's odyssey, From Kiss to Birth, Toumai, Ham, a chimp in space, Khufu pyramid*** (in development)
- Average or range license fee for commissions : 300 K € to 900 + (more if docu-drama, CGI, etc.). Large Majority of French initiative projects. Exception : Anne Franck (full drama from the diary)

France 3

- Profile : generalist channel, public, funded by tax (redevance : .. %) and advertising (.. %).
- Has 14 regional stations which have some specific slots in daytime + for regional news.
- These specific stations coproduce a lot of documentaries of regional interest (small cash amount + facilities). Small budgets, rarely international potential.
- **Documentary Unit :**
 - **Muriel Rosé**, head of documentaries and magazines unit
 - **Olivier Guiton**, head of documentaries
 - **Anna Glogowski**, CE documentaries

France 3 Documentary strands :

- ***One strand, 52 mn, weekly, Friday or Saturday 22.30***
 - Several collections, most of them very French. Alternatively :
 - **“Passé sous silence”** : history collection / strand, investigation about recent history
 - **“La vie comme un roman”** : strong human story
 - **“C’est ça la France”** : French society, immigration stories...
 - **“Personnel et confidentiel”** : People documentaries.
 - No science strand
 - Almost no foreign acquisitions or coproductions
 - Contribution : 90-150 K € per hour
- ***Prime time specials : French society, Human stories***
 - One prime time per month / 10 per year
- ***Prime time specials : History***
 - Ex: 2 x 110 mn **“Comme un juif en France”**, 3 x 52 mn ***Muslims in France***
 - Ex. 2 x 60 mn Brook Lapping’s ***Iran and western countries***
 - Ex. 1 x 110 mn ***Tchernobyl***

France 5

- Channel Profile: documentary and magazine channel, public, funded by tax, some advertising.
- Airs only until 7 PM on analog terrestrial TV, and full time on digital terrestrial / cable / satellite.
- Market share : (analog universe) : 6 %
- **Statistics**
 - *France 5 commissions approx 750 hours of documentaries per year*
 - *Acquires 400 hours of documentaries per year*
 - *Coproduces and pre-acquires 60 hours of documentaries per year from international producers*
 - *Average license fee for commissions : 87 000 €*
 - *Average license fee for preacquisitions : 30 000 €*
 - *Average license fee for copros with international producers : 60 000 €*
 - *Range license fee for acquisitions : 8 000 to 12 200 €*

France 5

Organisation for documentaries commissioning / acquisitions

- ***Head of programs : Philippe Vilamitjana***
- ***Head of all documentaries : Pierre Block de Friberg***
 - ***International Acquisitions and preacquisitions (French minority copros if French part is less 25 % of the budget):***
- **Head of dept : Caroline Behar**
- **Acquisition managers : Perrine Poubeau & Laurent Flahault**
 - ***Documentary Commissioning Unit (mainly programs initiated by French producers) :***
- **Head of documentary Unit : Carlos Pinsky**
- **Com Editors :**
 - **Hervé Guerin, science, medicine, environment (approx 50 hours per year)**
 - **Barbara Hurel, history (approx 50 hours per year)**
 - **Laurence Hamelin, discovery**
 - **Geneviève Boyer, economy, social issues**
 - **Sophie Chegarray, social issues**
 - **Céline Gandner, arts**

ARTE

- **“Documentary” Unit :**
 - **Head of Unit : Pierrette Ominetti**
 - **Commissioning editor for the History strand:**
 - **Daniel Khamdamov**
 - **Acquisition manager:**
 - **Marthe Vertueux**
- ***Arte History strand : 90 mn and 2 x 52 mn, Wednesday 21.00***
 - **Profile :** One offs, mini series, contemporary history
 - Average number of programs commissioned per year : 20 (12 - 2x52mn) (8 x 90mn)
 - Average or range license fee for commissions :
90 mn (200.000 to 250.000 K €) 2 x 52 mn (250.000)
 - Average number of international pre-acquisitions + average license fee :
90 mn (80.000 €).
 - Example : Ivory coast

Arte

- Profile: cultural French-German channel, public, 100 % funded by tax, no advertising.
- The same channel is received in France, Germany and accross Europe via cable and satellite, in French or German.
- The channel is also terrestrial in France, only from 7 PM on, on analog terrestrial / full time day & night on digital.
- **Market share :**
 - French market share (analog universe) : approx 3,5 %
 - German market share : approx 1 %

ARTE

Organisation : One channel, several program providers / acquisition / commissioning centers :

–ARTE GEIE (Strasbourg), commissions approx 5 to 10 % of programming

–ARTE FRANCE (Paris), commissions approx 45 % of programming

–ARTE GERMANY, commissions approx 45 % of programming, divided into :

- **ZDF Arte, 22 %**
- **ARTE stations : 22 %**
 - **WDR**
 - **NDR**
 - **BR**
 - **SWR**
 - **RBB**
 - **HR**
 - **MDR**

Ex = for a weekly strand, 52 strands per year = 24 for Arte France, 5 for Arte GEIE, 12 for ZDF, 11 for ARD stations.

Inside of its 24 programs to provide for broadcast, Arte France will often apply a 1/3 acquisition, 1/3 re-runs / 1/3 new commissions ratio. I.e. commission 8 programs.

ARTE

- Acquisition Unit :

- manager: Nicolas Deschamps

- Unit “Découverte et Connaissance” :

- Head of Unit : Hélène Coldefy
- Commissioning editors:
 - Christine Reisen
 - Nathalie Verdier
 - Christoph Jorg

- Strands :

- **Arte science : 1 x 45 & 52 mn, monday 20.00**
- **Sunday theme evenings, 52 to 90 mn, Sunday 22.30**
- **Human adventure: 1 x 90 mn and 2x52 mn, saturday, 21.00**
- **Arte Découverte : 1 to 4 x 43 mn, monday-thursday, 19.00**

ARTE

– *Arte science : 43 & 52 mn, monday 20.00*

- **Profile** : One offs, contemporary science raising big questions for our societies
- Average number of programs commissioned per year : 6 to 8
- Average or range license fee for commissions : 110 to 120 K €
- Few pre-acquisitions (unless competition), 6 to 8 acquisitions : 15 to 20 000 K €
- Example : Humanimal

– *Sunday theme evenings, 52 to 90 mn, Sunday 22.30*

- **Profile** : One offs, popular themes matching a feature film. Any genre (mostly not science, not ancient history, not science). No controversy. The theme evening is constructed around the documentary (picking a blockbuster movie).
- 22 programs per year. 40 % acquisition, 40 % commission, 20 % re-runs
- Average number of programs commissioned per year : 8
- Average or range license fee for commissions : 120 K € +
- Average number of international acquisitions + average license fee : 8 films per year, 15-20 000 K €

ARTE

– *Human adventure: 90 mn and 2x52 mn, saturday, 21.00*

- **Profile** : One offs and mini series, ancient history, archeology, history of science
- Average number of programs per year : 27 evenings including re-runs, acquisitions and commissions. Approx 10 commissions, either 90 mn or 2x52 mn
- Average or range license fee for commissions : 120 up to 300 K €
- Average number of international pre-acquisitions / acquisitions : 10

– *Arte Découverte : 43 mn, monday-thursday, 19.00*

- **Profile** : Science, wildlife, adventure, history, popular themes, visual, popular discovery.
- One offs and mini series (2, 3, 4 or 5 episodes)
- Average number of programs per year : 100 slots, 33 acquisitions, 33 reruns, 33 coproductions
- Average or range license fee for commissions : 80 000 K €+
- Average number of international pre-acquisitions + average license fee : few pre-acquisitions, only if fight for exclusivity with another broadcaster. Arte prefers to have a French producer guaranteeing the delivery of a program suitable for them. Contribution 30 to 50 000 €
- Average number of international acquisitions + average license fee : 15 to 20 000 €, depending on exclusivity in France and Germany

Canal Plus

- Channel Profile: pay TV channel, private, funded by subscription, some advertising.
- Airs Movies, Sports and Exclusive creative contents (drama, documentaries, animation, etc.)
 - Documentary department :
 - **Head : Christine Cauquelin**
 - **Commissioning Editors :**
 - **Françoise Feuillye**
 - **Philippe De Bourbon**
 - Documentary strands :
 - The New explorers
 - Emergence - Strand Monthly: emerging social trends.52'minutes.
 - Average number of programs commissioned per year :12
 - Average or range license fee for commissions : No communicated
 - La Séance documentaire: original point of vu.90'minutes
 - Average number of international acquisitions:12
 - Average license fee :No communicated

TF1

- Channel Profile: private TV channel, 100% funded by advertising. Generalist.
- Documentary department
- **Head of dept : Reine Valerie Bensaid**
- Documentary strands
- No regular documentary strand, only event programming, night time (22.30 and beyond).
- Average or range license fee for commissions :200 K €

M6

- Channel Profile: private TV channel, 100% funded by advertising. Generalist, aims at 15-45

- **Documentary department**

- **Head of dept : Sylvia Kahn**
- **CE : Anne-Sophie Larry**

- **Documentary strands**

- No regular documentary strand, only event programming.

- ***Examples of programming :***

- Docusoap, children hospital, 20x1h
 - Docusoap, plastic surgery, 20x1h

- ***Examples of recent commissions in history or science :***

- Stalin's story 90 mn, in house production
 - US / UK / German docu dramas (more dramas than docus): Superstorm, Prehistoric park.

