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ICTC CTIC

The Future of Digital Content

A France-Canada Summit

INSTITUT FRANÇAIS

Canada

Summary

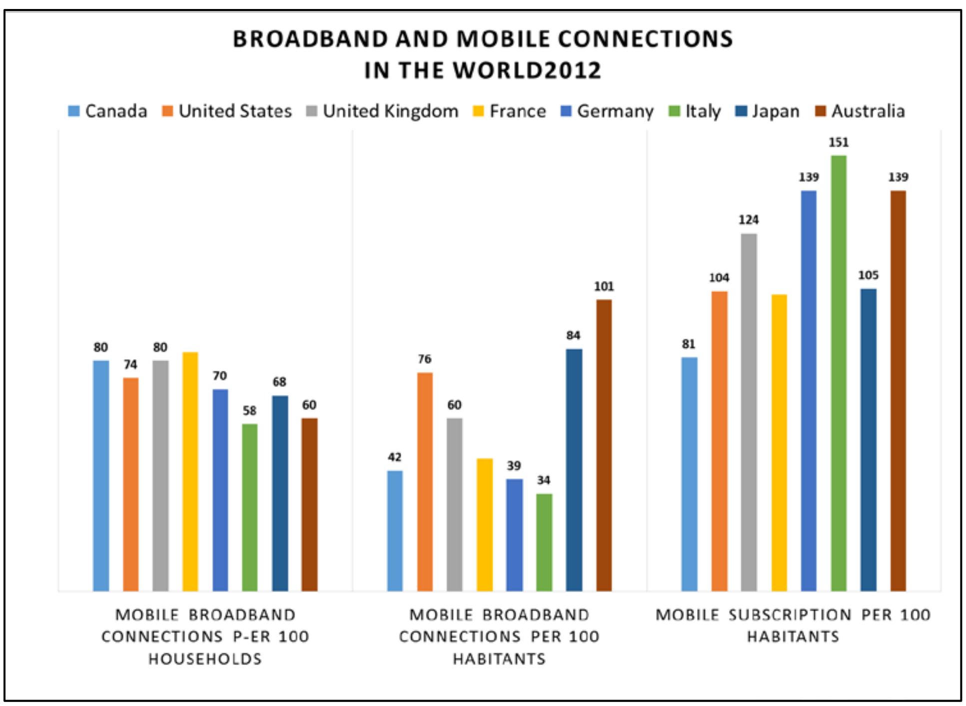
Held in November 2012, the France-Canada Summit brought together close to a hundred French and Canadian participants representing a broad spectrum of private and public stakeholders in the fields of music, audiovisual and interactive content.

Over the two-day event, participants attended conferences and case study presentations and discussed the challenges facing their industries in the new global context marked by the increasing dematerialization of physical content media and the ongoing fragmentation of mass audiences. They exchanged ideas and solutions and drew up a list of recommendations for presentation to their respective governments.

The discussions focused on three main themes:

- Consumer takes digital power
- A sustainable digital ecosystem
- Regulation and policy in a digital environment

These themes took participants down a number of often divergent paths. However, one of the common threads to emerge from the recommendations was the urgent need for governments to review the policies, support measures and regulations related to the content industries in order to help them adapt to the new environment cre-



Data compiled by the CRTC, Bank of America Merrill Lynch, IDATE, OCDE, UIT
Source: Communications Monitoring Report 2013, CRTC

ated by the fundamental shifts taking place in these industries. Current tools, tax credits, copyright rules and broadcasting regulations, for example, tend to treat content and distribution platforms separately, based on a silo approach. Content distribution giants such as Apple, Google and Facebook, in addition to controlling several steps in the value chains (device manufacturing, applications, online stores), do not favour national content. Governments are under pressure to take into account this new form of convergence in order to foster the emergence of "strong national players" capable of competing against these dominant industry players.

The international context of the Summit underscored the importance of collaboration at the global level in terms of the creation, production, distribution and marketing of content, as well as in terms of research and development.

Summit participants also acknowledged the magnitude of the challenges facing both industry and government. Without proposing any easy solutions, several participants pointed out that the new realities, rapid technological developments, globalization, disintermediation and evolving consumer expectations all represent new and unique opportunities for actors capable of navigating this environment.

Introduction

The France-Canada Summit, organized jointly by the Embassy of France in Canada and the Information and Communications Technology Council (ICTC/CTIC), was held in Ottawa on November 15-16, 2012.

The event brought together nearly a hundred participants from France and Canada, including major stakeholders, policy-makers and leaders in the music, audiovisual and interactive content industries, representing both large and small public and private companies as well as content support and regulatory bodies. Over the two-day summit, participants discussed the challenges raised by the new digital ecosystem and debated how government and business can contribute to the development of a sustainable content industry.

France and Canada have a long history of a shared commitment to protecting their cultural sovereignty and diversity. With the aim of supporting their cultural and creative sectors, both countries have put in place strategies and regulatory practices that have many aspects in common.

The goal of the organizers of this summit was to foster an exchange of expertise and perspectives between representatives of organizations facing similar challenges and contexts.

Based on the central premise that the rapid evolution of networks and technology has created new types of content, distribution channels, business models and challenges and opportunities, the discussions were organized around three main themes:

CONSUMER TAKES DIGITAL POWER

The digital environment has generated new means of expression, new ways of reaching broader audiences and new possibilities for user interaction with content. More importantly, it has cast consumers in a new role, placing them at the very centre of the value chains by turning them into creators, producers, aggregators and actors wielding significant power.

A SUSTAINABLE DIGITAL ECOSYSTEM

The development of new business models is vital in order to ensure the viability and sustainability of music, audiovisual and interactive content in the new digital landscape. Our current governments must revisit and adapt their objectives and the tools they use to support industry.

REGULATION AND POLICY IN A DIGITAL ENVIRONMENT

The increasing globalization of the content industry has pushed it into a new digital realm. While the traditional, geographically based rights markets are still putting up resistance, they are increasingly ill adapted to the new context. Regulators and policy-makers need to reconsider their objectives and ensure harmonization between their measures, the expectations of consumers of digital content and the sustainability of the content industries.

Participating organizations

CANADA

Canada Media Fund
CIAIC
ESA / ALD
ADISQ
CMPA
CBC/Radio-Canada
CRTC
CALQ
CTIC
Dep Distribution Exclusive Ltée
Fonds Bell
Fonds Capital Culture Québec
Fonds Radiostar/
Fondation Musicaction
Generator
Gourd Communications
Groupe Archambault
Groupe Evolumedia
Groupe Média TFO
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Helix Commerce International Inc.
Idéacom international inc. / ZENITH abc
Manipulations
McMaster University
Mediazoic
MétéoMedia
Music Canada
OCAD University
ONF
Plan B Developpement Inc /TV App Agency
Québecor Media Inc.
Human Resources and Skills Development Canada
Ryerson Digital Media Zone
SAMSUNG Canada
Shaftesbury
Social Game Universe
SOCAN
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TELUS
Tribal Nova
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FRANCE

AGAT Films/Ex Nihilo
ARTE France
Creadity
CSA
France Télévisions
French Embassy in Canada
INA
Manipulations
Mediazoic
Mesagraph
MINES ParisTech
Noomiz
Musicaction
ORANGE
Social Game Universe
Synaptop
fouscoprod
Vivendi

(see annex for participants list)

CONSUMER TAKES DIGITAL POWER

Participants discussed at length the new relationship that has emerged between consumers and content. The combination of new technologies, which have freed content from its former constraints (scheduled programming, distribution on physical media), and the new forms of dialogue between producers and consumers engendered by the growing influence of social media, has helped to redefine the concept of broadcasting as the unilateral transmission of signals toward large numbers of people. Now firmly integrated in the value chain, consumers can impose their expectations: access to content when they want it, on all platforms and for free or at a very low cost.

This new relationship brings with it both opportunities and constraints, a number of which were raised during the Summit.

CASE STUDY: APOCALYPSE 14/18

TRANSMEDIA AND "TRANSFUNDING"

***Apocalypse 14/18*, the new TV series by the creators of *Apocalypse 39/45* and *Apocalypse Hitler*, aired on France 2 and TV5 Québec-Canada, will fully exploit the possibilities of transmedia, or the combined use of multiple media to construct a universe.**

While this type of transmedia experience has become increasingly important as a means of attracting and retaining an audience, it is also much more difficult to finance. *Apocalypse 14/18*, an international co-production between France, Canada and other international players, may very well set the pattern for future funding possibilities.

OPPORTUNITIES

Innovation. The arrival on the market of new mobile devices, along with the increasing penetration of high-speed Internet and the digitization of content have all contributed to the emergence of an extremely rich media ecosystem that has allowed creators and producers to innovate in the deployment of original transmedia content.

Enhanced experience. Search engines, aggregators and social media offer Internet users an enhanced experience. The editing and curation of content have become an important component of the new digital ecosystem, in which a wealth of innovative applications, capitalizing on increasingly sophisticated devices and cloud architecture, allow users to customize how they use content.

New forms of content. Social media are not just a companion to broadcasting or an advertising vehicle, but a content choice in and of themselves.

CONSTRAINTS

Disintermediation. The intermediaries between content and consumers are gradually disappearing, but participants were not all convinced that market forces alone will be capable of supporting the distribution of traditional media via the new networks.

Generation gap. Despite high adoption rates for new devices and services, it is important to be aware of the generational factor and its effect on the pace of uptake; indeed, in both France and Canada, the biggest users of tablets and smart phones are younger generations. That being said, this phenomenon will fade as these younger generations grow older.

Free content. Today's consumer expects content to be available for free, or at least at the lowest cost possible. Currently emerging business models such as streaming and on-demand programming, while they meet the expectations of consumers, are not yet advantageous for creators and industry. In fact, as the expression goes, they are contributing to "the conversion of analog dollars to digital pennies."

A SUSTAINABLE DIGITAL ECOSYSTEM

This was one of the key issues discussed during the Summit. Participants agreed that the new business models have not yet proven their sustainability and generally do not offer the same type of revenue streams as in the days when revenue was driven by retail sales of physical media and mass marketing.

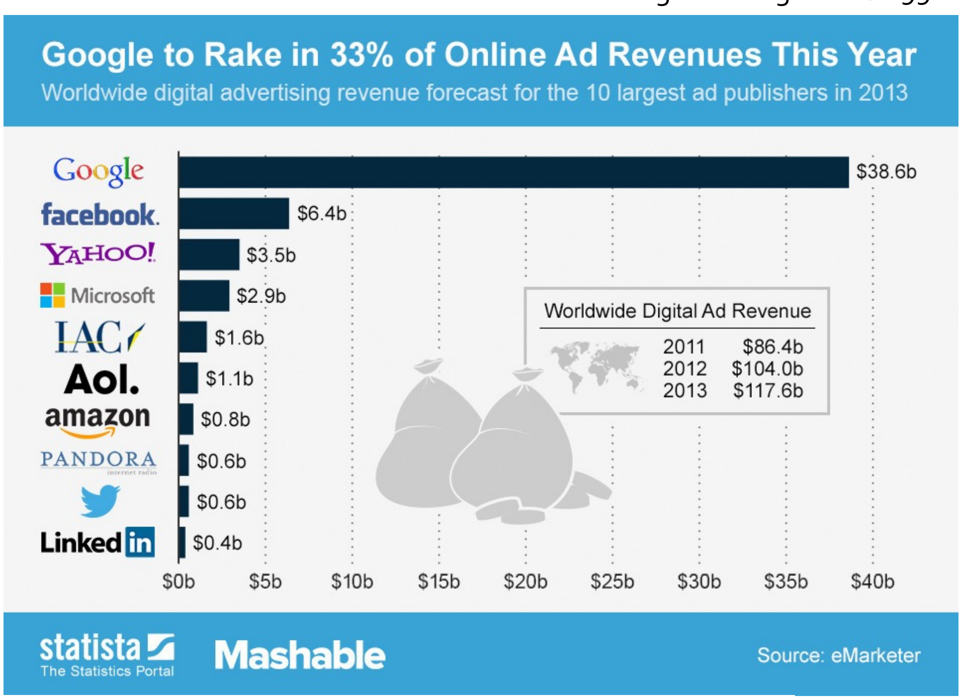
Sustainability is a vast and complex issue and participants approached it from a number of different angles.

THE FAR-REACHING POWER OF THE INTERNET GIANTS

The dominant players on the Web today have turned traditional business models on their head and set their own rules. Content producers have little choice but to do business with the likes of Google, Apple and Facebook, whose platforms are critical to achieving scale. Their dominant position can make such partnerships extremely advantageous, but they remain fraught with uncertainty; for example, the models and conditions of collaboration vary widely and the popularity of a platform today is no guarantee of its future popularity.

Advertisers play a crucial role in this new ecosystem, where advertising markets and online video are dominated – and disrupted – by Google, followed at a distance by Facebook. As several participants noted, this disruptive effect is compounded by the fact that these foreign-based platforms have facilitated the rapid penetration of foreign content in the Canadian and French markets.

For its part, Apple has imposed a music retailing model offering the downloading of songs at $0.99 a



GOOGLE EARNS 33% OF ONLINE AD REVENUES
SOURCE: MASHABLE HTTP://MASHABLE.COM/2013/08/28/ONLINE-AD-REVENUES/

piece (now $1.29), driven by a strategy to occupy several steps in the value chain (devices, operating systems, content aggregation). This model has allowed it to bypass the traditional steps of broadcasting and distribution. It will be interesting to observe the effect of the growing popularity of music streaming services on this model (that Apple recently adopted with the launch of iTunes Radio).

NEW SOLUTIONS TO NEW CHALLENGES

Vertical integration. The national broadcasting and distribution industries have reacted to the fragmentation of their markets by strengthening their vertical integration. Some participants see the integration of content production and distribution within a single group as their only defence in the face of the global giants. Others believe that this trend reduces diversity and creates a more restrictive environment for independents.

Niche markets. According to many participants, the new analytics tools for interactive platforms could hold the key to profitability. The ability to reach very specific target audiences using new technology suggests that niche markets have the potential to be profitable.

Funding sources. Participants agreed on the need to develop innovative funding solutions. While crowdfunding was cited as one possible solution, its effectiveness was called into question. The absence of venture capital for digital projects in both Canada and France was also discussed.

Co-productions and partnerships. Co-production was frequently mentioned as a reliable form of economic partnership used by content creators on both sides of the Atlantic vying for market share in the face of Hollywood's dominance.

However, funding mechanisms need to be adapted to the new environment in order to improve the effectiveness of these tools. In Canada, in particular, the different support funds often depend on the approval of a broadcaster, resulting in a suboptimal distribution of resources.

Also discussed was the potential offered by collaborations between markets, based on the sharing of financial risk, cooperation in content production and the development of creative and technological complementarities.

National distribution platforms. Platforms that are not controlled from the United States could also contribute to the sustainability of content. The National Film Board (NFB) in Canada, for example, is pursuing the creation of such a platform. However, the implementation of this type of superstructure requires not only greater venture capital investment, but also the recognition by

CASE STUDY: SHAFTESBURY – SMOKEBOMB ENTERTAINMENT.

THE 21ST CENTURY PRODUCER: TALKING DIRECTLY TO THE CONSUMER

Shaftesbury, based in Toronto, Canada, produces programming broadcast in over 120 countries and is known for its innovative content and its control of the entire chain of rights. The group controls the rights to most of its productions (TV, entertainment, applications, games), created in partnership with television networks (CTV, Fox International, HBO, etc.) and other co-producers. Shaftesbury's expertise lies in its capacity for multi-platform marketing through the use of digital technology, allowing it to create value around its programs.

Thanks to its end-to-end control of rights, Shaftesbury has been able to develop business models adapted to each of its projects, thereby reducing its dependence on broadcasters and diversifying its sources of revenue. In this ecosystem, the visibility gained by its multi-platform content on TV channels is a crucial factor for its profitability.

The keys to Shaftesbury's success lie in: convergence between content creation, distribution and innovative technology, control of rights and a strong position in international markets, which is particularly important in a context where the notion of territory is increasingly irrelevant.

Graham Henderson of Music Canada gave a presentation that underscored the degree to which digital technology has revolutionized the music industry. He emphasized the disadvantages for artists of streaming, an increasingly dominant model thanks to services such as Pandora. He also proposed a series of measures, including the development of links between the music industry and the tourism industry through the organization of festivals, enhanced music education, and exports.

Since the Forum, Music Canada has published a document to explore those issues further: The Next Big Bang – a New Direction pour Music in Canada ». It can be found online at: http://musiccanada.com/Assets/PDFs/TheNextBigBang.pdf

governments that support for content creation must be accompanied by support for forms of distribution that can compete with the dominant global players.

Contribution by Internet service providers (ISP). Canada and France have pursued separate approaches in this regard. While France has implemented a tax on telecom operators that is still being debated and studied, Canada's highest courts have already rejected this option. While there was a lack of consensus among Summit participants on this thorny issue, they generally agreed that the many advantages these companies stand to gain from the gradual shift of content to online distribution justify imposing some form of contribution to content creation.

Finally, the success of the tools and measures put in place to build a sustainable industry depends crucially on a talented and skilled workforce, including artists who embrace entrepreneurship and entrepreneurs who understand new technologies.

REGULATION AND POLICY IN A DIGITAL ENVIRONMENT

Government support has always played an important strategic and economic role in the music, audio-visual and interactive content industries, while regulation has stimulated the development of the broadcasting sector.

Participants were unanimous on one point: regulatory approaches and support policies must take into account the global environment in this new universe marked by increasingly porous borders. While there was a certain consensus around the necessary role of the state in building sustainable digital content industries, there was a lack of agreement on the precise strategies and support measures required.

In the course of this discussion, participants identified some of the shortcomings of the current systems and formulated a number of proposals.

> *"Agreement tends to break down when it comes to the role of the state as policy-maker and regulator. For example, I found that public sector representatives paid lip service to the principle of support for innovation, but lacked the understanding and perhaps even the willingness to initiate the legislative or structural reform this entails."*
>
> A participant

SHORTCOMINGS

- At the same time as it has become more difficult to apply regulatory policies linked to cultural and industrial issues, it has become easier to get around them.
- Public policies take a silo approach to production and distribution. This compartmentalization is seen as arbitrary and increasingly out of sync with a market reality in which profitability hinges on control of access to content.
- The best-performing content is often favoured by government officials in charge of funding decisions, to the detriment of more innovative content.
- Others point to the difficulty of producing innovative content in a highly regulated environment.

PROPOSED MEASURES

- Canada needs a lighter regulatory framework: there were calls to remove content restrictions in order to create a more level playing field between Canadian players and their global competitors.
- A trans-Atlantic dialogue between stakeholders in France, Europe and Canada is needed to address tax asymmetries between national players and major international groups such as Google, Netflix and iTunes.
- Governments should direct support toward sectors that cannot depend on the market, such as experimental or niche content, and toward distribution and promotion engines for such content.
- Government intervention was proposed to regulate the perceived high cost of telecommunication services, which has created a digital divide within society.
- Policy-makers and regulatory bodies should increase their co-operation in order to focus efforts on achieving common aims in the digital environment (content regulation, consumer protection, co-production agreements).

Conclusion

The "Future of Digital Content: A France-Canada Summit" offered a unique opportunity for decision-makers from very diverse but inextricably linked worlds to peer into the near future and discuss their common interests in building sustainable content industries on both sides of the Atlantic.

The discussions reflected the dual nature of "content" as both a cultural and economic imperative. Strong content industries are significant job creators, while also contributing to the domestic economy. They also are also dynamic industries. Consumer media and entertainment activities feed demand for telecommunications services and create digital media expertise in all actors in the content creation chain, as well as fostering innovative products and services.

The digital content industries, however, are not just important economically. Storytellers hold up a mirror to society, reflecting its own cultural values, ideally in all their diversity. The promise of new technology and content forms is that they will give voice to a broad spectrum of perspectives, unconstrained by geography, economics and power structures.

The challenges were presented clearly and realistically. Traditional models of content creation and distribution are under increasing pressure, with the impact being felt by both large entities and independent producers and firms. The challenge of finding financing for content, especially independent linear content, is a critical issue both in France and Canada.

> *Let's face it: what people used to call frescoes, paintings, engravings, prints, poems, novels, symphonies, rock 'n' roll, fashion or war photographs, movies, arcade games, television series, press editorials, racing chronicles, crossword puzzles, biology articles, anatomical drawings, road maps or court reports – all of these incredibly complex things with completely different meanings; well, after countless symposia and meetings of experts and geeks, all these things end up being aggregated and lumped together and diluted to the point where they dissolve into that appalling word "content."*
> Olivier Bomsel, Professor of Industrial Economics, École MINES Paris-Tech, opening address to the Summit

At the same time, companies such as Noomiz and Believe Digital and public bodies such as Canada's National Film Board are discovering that strong integration between content, distribution and, especially, social media, can attract audiences willing to pay for content. The success of the music recording industry will likely rest on tight global integration of experience and services as well as new regulatory tools aimed at supporting an ecosystem that goes beyond mere retail sales of music. How content is distributed and the capacity of distribution networks to treat audiences as more than just passive consumers are likely to be major factors in the future sustainability of the industry.

Two days were obviously insufficient to find answers to all the questions raised during the Summit. This event will have served as a valuable springboard for the development of trans-Atlantic exchanges and sharing in the long run.

RECOMMENDATIONS TO THE GOVERNMENTS OF CANADA AND FRANCE

Summit participants recommended the following measures to the Canadian and French governments:

1. **Implement adaptation measures**, particularly tax measures, aimed at supporting the industry. These measures should take into account convergence, but without compromising measures that have proven successful:
   - Future measures should incorporate new forms of support and promotion for multiplatform convergence at the expense of existing mechanisms based on silos; governments are encouraged to simplify access to public funding for multiplatform infrastructure;
   - Greater flexibility is needed in regulatory processes in order to avoid hindering the development of new forms of monetization;
   - Create new incentives to support new digital platforms and infrastructure rather than supporting content creation alone;
   - Support the development of new digital skills and competencies in the working population, notably through academic training, mentorship and the development of angel investor networks for young digital start-ups, etc.;
   - Stimulate the emergence of new economic activities (especially in the area of Web metrics);
   - Support the development of new multiplatform businesses to help break down the silos between the music, audiovisual and interactive content industries.

2. **Encourage and support exchanges** and investment between Canadian and French companies in this industry.

3. **Create an enabling environment for entrepreneurship,** notably at the level of investment and taxation. The state must play a leveraging role and support the financial risk taken on by private firms, including new digital start-ups:
   - Support innovation and experimental, niche and other content that might not be created by market forces alone;
   - Stimulate public/private partnerships in the creation and distribution of cultural content;
   - Encourage new types of investment, including crowdfunding and venture capital, and increase government loan guarantees in order to facilitate access to credit.
   - Provide guidance on taxation issues in the trans-Atlantic dialogue between French, Canadian and European stakeholders;
   - Demonstrate greater flexibility in order to support rapid changes in the digital market by increasing consultation with digital industry stakeholders.

4. **Facilitate advanced research and development** collaboration between centres of excellence and industry in the two countries.

5. **Strengthen international exchanges** on issues related to the creation, production, distribution and marketing of products and cultural content in the digital age.

6. **Implement regulatory measures to:**
   - Better protect the digital distribution of high-quality cultural content;
   - Give the industry greater regulatory freedom in terms of content creation and regulation in order to level the playing field between Canadian players and their global competitors;
   - Better protect consumer access to quality content on the Internet;
   - Consider the new position occupied by OTT and connected TV in the chain of distribution and dissemination and encourage their participation as service providers in funding creation and innovation;
   - At the regulatory level, take into account the new global environment in which music, audiovisual and interactive content is being created.

7. **Encourage the emergence of "strong national players"** capable of competing with the dominant market players. These players should have the critical mass necessary to promote and distribute Canadian and French cultural content internationally.

Appendix I

List of Participants

Name		Organization
Namir	Anani	Conseil des technologies de l'information et des communications (CTIC)
Guillaume	Aniorté	Tribal Nova
Nicolas	Bailly	touscoprod
Éric	Baptiste	Société canadienne des auteurs, compositeurs et éditeurs de musique (SOCAN)
Axel	Baroux	UBIFRANCE Canada
Kelly	Beaton	Patrimoine canadien
Benoit	Beaudoin	TV5 Québec Canada
François	Bédard	Plan B Developpement Inc / TV App Agency
Jay	Bennett	Shaftesbury
Max	Berdowski	Generator – Ottawa's Digital Media Cluster
Jean-François	Bernier	Patrimoine canadien
Steve	Billinger	
Jean-Robert	Bisaillon	Société canadienne des auteurs, compositeurs et éditeurs de musique (SOCAN)
Jean-Pierre	Blais	Conseil de la radiodiffusion et des télécommunications canadiennes (CRTC)
Frédéric	Bokobza	Ministère de la Culture et de la Communication
Olivier	Bomsel	MINES ParisTech
Charmaine	Borg	Député, Parlement du Canada
Catherine	Boucher	Société de développement des entreprises culturelles (SODEC)
Carolle	Brabant	Telefilm Canada / Téléfilm Canada
Catalina	Briceno	Canada Media Fund

Name		**Organization**
Pierre	Campeau	Fonds des médias du Canada (FMC)
Stéphane	Cardin	Fonds des médias du Canada (FMC)
Melissa	Caron	Ressources humaines et Développement des compétences Canada
Louise	Chenail	Fonds Radiostar/Fondation Musicaction
Arnaud	Colinart	AGAT Films/Ex Nihilo
Valérie	Creighton	Fonds des médias du Canada (FMC)
Marie-Laure	Daridan	Intitut national de l'audiovisuel (INA)
Sheila	De La Varende	Telefilm Canada / Téléfilm Canada
Hugo	Delaney	Québecor Media Inc.
Erika	Denis	Ambassade de France au Canada
Sara	Diamond	OCAD University
Claire	Dion	Fonds Bell
Deborah	Drisdell	Office National du Film du Canada (ONF)
Solange	Drouin	Association québécoise de l'industrie du disque, du spectacle et de la vidéo (ADISQ)
David	Dufresne	Manipulations
Julie	Duhaut-Bedos	Ambassade de France au Canada
Antoine	El Iman	Noomiz
Gaelle	Essoo	Ambassade de France au Canada
Sylvie	Forbin	Vivendi
Valérie	Fox	Ryerson Digital Media Zone
Emmanuel	Gabla	Conseil supérieur de l'audiovisuel (CSA)
Harold	Gendron	Société de développement des entreprises culturelles (SODEC)
Roxane	Girard	Téléfilm Canada
Cindy	Gordon	Helix Commerce International Inc.
Suzanne	Gouin	TV5 Québec Canada

Name		**Organization**
Alain	Gourd	Gourd Communications
Maxime	Guedj	Creadity
Nathon	Gunn	Social Game Universe
Jérôme	Hellio	CBC/Radio-Canada
Graham	Henderson	Music Canada
Michael	Hennessy	Canadian Media Production Association (CMPA)
Omar	Janjua	UBIFRANCE Canada
Frédéric	Kaplan	Ambassade de France au Canada
Jason J.	Kee	Association canadienne du logiciel de divertissement (ESA / ALD)
Ian	Kelso	L'Alliance Interactive Canadienne (CIAIC)
Denis	Ladegaillerie	Believe Digital
Sylvain	Lafrance	HEC Montréal
Pierre-E	Lalonde	Patrimoine canadien
Agnès	Lanoë	ARTE France
Natalie	Larivière	V Interactions Inc.
Francois	Laroche	Téléfilm Canada
Nicolas	Lazic	SAMSUNG Canada
Sébastien	Lefebvre	Mesagraph
Jeff	Leiper	Conseil des technologies de l'information et des communications (CTIC)
Ann	Mainville-Neeson	TELUS
Pierre	Marchand	Groupe Archambault
Norman	McDevitt	Conseil des technologies de l'information et des communications (CTIC)
Frédéric	Mercier	Ressources humaines et Développement des compétences Canada
Thomas	Michelon	Ambassade de France au Canada

Name		**Organization**
Pierre	Nantel	Député, Parlement du Canada
Greg	Nisbet	Mediazoic
Josette D.	Normandeau	Idéacom international inc. / ZENITH abc
Jean-Pierre	Novak	Agence française pour les investissements internationaux (IFA/AFII)
Glenn	O'Farrell	Groupe Média TFO / l'Office des télécommunications éduca-tives de langue française de l'Ontario (L'OTÉLFO)
Gilbert	Ouellette	Groupe Evolumedia
Tom	Pentefountas	Conseil de la radiodiffusion et des télécommunications cana-diennes (CRTC)
Tom	Perlmutter	Office National du Film du Canada (ONF)
Luc	Perreault	The Weather Network | MétéoMedia | Pelmorex Media Inc.
Réjean	Perron	Conseil des arts et des lettres du Québec
Louise	Poirier	Conseil de la radiodiffusion et des télécommunications cana-diennes (CRTC)
Tony	Porrello	V Interactions Inc.
Michel	Pradier	Téléfilm Canada
André	Provencher	Fonds Capital Culture Québec
Irena	Radisevic	McMaster University
Ram	Raju	Téléfilm Canada
Quyen	Ricquemaque	Ambassade de France au Canada
Guylaine	Roy	Patrimoine canadien
Christian	Sarrazin	Société canadienne des auteurs, compositeurs et éditeurs de musique (SOCAN)
J.Serge	Sasseville	Québecor Média Inc.
Tanguy	Selo	Imaginove
Sami	Siddique	Synaptop
Mark	Steinmetz	CBC/Radio-Canada
Karen	Thorne-Stone	Société de développement de l'industrie des médias de

Name		**Organization**
		l'Ontario (OMDC / SODIMO)
Georges	Tremblay	Dep Distribution Exclusive Ltée
Alexandre	Vulic	Ambassade de France au Canada
Philippe	Zeller	Ambassade de France au Canada

APPENDIX II

Partners

ICTC and the French Embassy would like to thank the following partners for their support and

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