



Evaluation of the funding allocated by the Department of Canadian Heritage to the TV5 Program

2011-12 to 2016-17

Evaluation Services Directorate
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List of acronyms and abbreviations

ARTE	Association relative à la télévision européenne
CBC	Canadian Broadcasting Corporation
CBC/Radio	Canadian Broadcasting Corporation
CEO	Chief executive officer
CRTC	Canadian Radio-television and Telecommunications Commission
FBS	France Belgium Switzerland
FTEs	Full-time Equivalents
LA	Latin America
MTM	Media Technology Monitor
PCH	Canadian Heritage
PMERS	Performance Measurement, Evaluation and Risk Strategy
TV5QC	TV5 Québec Canada
USA	United States of America

This evaluation examines the relevance and results achieved exclusively by the Program. It is not an evaluation of TV5MONDE or TV5 Québec Canada.

Executive Summary

TV5 Program Description

The TV5 Program ensures the Government of Canada's financial and diplomatic participation in the TV5 partnership. Program delivery falls under the responsibility of the Strategic Policy and Management Directorate of the Cultural Affairs Sector of Canadian Heritage (PCH). Since April 2014, it has had a permanent annual budget just over \$11 million.

TV5 is a Francophonie operator. It is a multilateral partnership of five donor governments: France, the Wallonia-Brussels Federation, Switzerland, Canada and Quebec. The purpose of Canada's involvement in TV5 is:

- to contribute to Canada's international profile by offering Francophone Canadian artists and producers a prominent showcase in the international audiovisual market (TV5MONDE);
- to offer Canadians a cross-cultural perspective on the Canadian and international Francophonie by operating the TV5 signal in Canada, whose programming includes a large share of Francophonie programming not available on other Canadian French-language channels (TV5 Québec Canada).

Evaluation approach

The evaluation, which covered the period from 2011–12 to 2016–17, was conducted in accordance with the Departmental Evaluation Plan 2016–17 to 2020–21 and the Treasury Board Secretariat's *Policy on Results* (2016). The evaluation examines the relevance, effectiveness and efficiency of Canadian Heritage's TV5 Program.

Key findings

Relevance

The Government of Canada's participation in TV5 remains relevant as it promotes Francophone culture in Canada and around the world. It is also a cultural diplomacy tool for advancing Canadian priorities.

TV5, like other channels, is confronted with the dynamics of the shift to digital: the media landscape is constantly evolving and there is a shift in media consumption habits among young people under 30, who are increasingly consuming media through the internet. PCH's TV5 Program, through its financial

contribution and participation in governance structures, encourages the channel to respond to these new developments. In recent years, another challenge faced by the program's recipients has been the increasing cost of producing audiovisual content and the cost of releasing Canadian programming rights for broadcast on the various TV5MONDE platforms, while the budget allocated for these purposes (export budget¹) has remained the same. According to the stakeholders, this could result in a reduction in the airtime of Canadian Francophone productions on TV5MONDE's networks or in the airing of lower quality content.

The objectives of the TV5 Program are aligned with PCH's objectives, priorities and strategic objectives. They contribute to the strategic outcome wherein "Canadian artistic expressions and cultural content are created and accessible at home and abroad."² In addition, broadcasting is considered a public service essential to the cultural construct of Canada, its unification and its emancipation. The federal government therefore has a role to play in financing the production and broadcast of television and digital content. TV5 is a direct operator of the Summit of La Francophonie that allows partners to participate in raising the Francophonie's profile and advance their priorities.

Effectiveness

In terms of immediate outcomes, Canada's financial contribution, managed by the TV5 Program, supports the development of the TV5MONDE and TV5 Québec Canada (TV5QC) strategic frameworks. The participation of PCH's TV5 Program in TV5's decision-making bodies allows it to exert a degree of influence on the nature of the channel's strategic priorities. More specifically, Canada's support for TV5 has enabled TV5MONDE and TV5QC to broadcast their television brands and to put audiovisual content online on their digital platforms. This has also made it possible to offer TV5 Canadian programming so that it could be broadcast on the channel's various signals around the world and in Canada.

The evaluation shows that Canadian content on TV5MONDE has increased since 2013 in terms of the number of hours broadcast. The addition of signals in new geographic areas and specialty channels and programs for learning French have contributed to these results.

With respect to intermediate outcomes, the evaluation shows that between 2011 and 2016, the average percentage of Canadian prime time programming broadcast fluctuated between 3% and 9%. In most regions, except France and Africa, the share of Canadian content remained constant or increased slightly over the same period.

¹. For the purposes of this report, the term "export budget" will refer to the budget envelope available within the TV5 Program for the acquisition of Canadian programs for broadcast on the various TV5MONDE platforms. It is important not to confuse this budget envelope with that of PCH's new program budget dedicated to the implementation of Canada's Creative Export Strategy launched on June 26, 2018.

². It should be noted that during the evaluation period, the Policy on Results was implemented. However, the evaluation examined the results of the TV5 Program under the Program Alignment Architecture.

As for distribution on digital platforms, there has also been an increase in traffic.

The financial contribution of Canadian Heritage's TV5 Program to TV5QC has made it possible to produce original French-language Canadian programs that reflect the reality of Francophone communities across Canada. In accordance with CRTC requirements, a certain percentage was produced or co-produced by independent producers from outside Montréal and Quebec. For example, in the years covered by the evaluation, between 15% and 20% of TV5QC's content came from independent French-Canadian production. The CRTC's licence states that the UNIS channel must broadcast at least 75% of Canadian content. Although it is not financed by the federal government, UNIS has made a significant contribution to the broadcasting of Canadian productions from the country's various Francophone communities, thereby providing a cross-cultural perspective on Canadian Francophone culture across Canada, which is one of the program's objectives.

The evaluation found that Canada's investment in TV5 reached 318 million households worldwide and 10 million in Canada, thereby contributing to the influence of both the international and Canadian Francophonie.

Efficiency

The evaluation found that the TV5 Program is efficient. The funding provided by the Government of Canada has assisted TV5 to mostly achieve the expected results. The two operators achieve their results through different budget structures. While 90% of TV5MONDE's revenues are contributed by partner governments, TV5QC's revenues are largely derived from subscription fees and advertising revenues.

On the other hand, the increase in the digital space presents challenges for the cable broadcasting business model, which could reduce TV5's profitability and, consequently, its ability to offer varied and quality programming.

With respect to the performance measurement framework for the evaluation period, the mechanisms in place, including strategic plans, financial statements and operators' annual reports, as well as the minutes of meetings of the parties involved, made it possible to monitor and report to a large extent on the progress made during the evaluation period, except for data on television content consumption and on TV5MONDE's digital platform.

Other issues

At the time of the evaluation, the program had not collected data on gender equality issues. However, the program did collect some quantitative data on the audiovisual preferences and viewing patterns of women and men.

As for governance, TV5 has several mechanisms in place to ensure governance and to monitor progress toward the achievement of results. Nevertheless, it would be beneficial to the program if there were

greater synergy, particularly through the sharing of information with other PCH groups that collect and analyze data in the field of broadcasting and digital communications.

Recommendations

Recommendation 1

That the Senior Assistant Deputy Minister of Cultural Affairs determine the extent to which the budget for the release of Canadian programming rights to TV5MONDE follows the trend in market rates in order to continue promoting quality Canadian Francophone programming in the world.

Recommendation 2

That the Senior Assistant Deputy Minister of Cultural Affairs take the necessary steps to strengthen the ties between the TV5 Program and other PCH groups (e.g., Broadcasting and Digital Communications or Strategic Policy and International Affairs) in order to share knowledge and data on trends, including technology, to ensure that TV5's performance is properly monitored.

1. Introduction

This report presents the findings, conclusions and recommendations of the evaluation of the Department of Canadian Heritage's (PCH) TV5 grant and contribution program for the period from 2011–12 to 2016–17. The evaluation was conducted in accordance with the Treasury Board of Canada Secretariat's *Policy on Results* (2016) and the Departmental Evaluation Plan 2016–17 to 2020–21. The report is divided into six sections, including this introduction. Section 2 of the report presents the Program. It is followed by a description of the methodology and analysis employed to conduct the evaluation (Section 3), findings (Section 4) and conclusions (Section 5). The last section of the report contains recommendations, the management response and action plan.

The evaluation framework for this evaluation is based on the Performance Measurement, Evaluation and Risk Strategy (PMERS) valid for this evaluation period, that is, 2011–12 to 2016–17. In accordance with the new *Policy on Results* (2016), the Program has developed a Performance Information Profile that will be used for future evaluations.

2. Program profile³

PCH's TV5 Program ensures the Government of Canada's financial and diplomatic participation in the TV5 partnership. Program delivery falls under the responsibility of the Strategic Policy and Management Directorate of the Cultural Affairs Sector of PCH and has a permanent budget just over \$11 million.

TV5 is a Francophonie operator. It is a multilateral partnership of five funding governments: France, the Wallonia-Brussels Federation, Switzerland, Canada and Quebec. Some African states occasionally make financial contributions. The partnership is based on the participation of public television networks located in the participating countries, that is, France Télévisions (France 2, France 3, France 4, France 5, France Ô), France Média Monde, ARTE France, Radio-Télévision belge Francophone, Radio-Télévision Suisse, Radio-Canada, Télé-Québec, and organizations such as the International Council of French-Speaking Radio and Television.

In 1986, Canada and Quebec joined Switzerland, the Wallonia-Brussels Federation and France in the TV5 partnership in order to enrich French-language programming produced in Canada and provide Canadians with audiovisual content and programming that reflects the cultural vitality and diversity of the Canadian and international Francophonie. TV5MONDE was created in 1984 to broadcast international French-language programming.

3. The descriptive information on the TV5 Program comes primarily from the Performance Measurement, Evaluation and Risk Strategy (PMERS).

TV5QC was created in 1986. It is responsible for broadcasting the TV5 content in Canada and its headquarters is located in Montréal.

Since then, the partnership has evolved and TV5's management structures have been amended on a few occasions. On August 1, 2001, a consolidation of all of TV5's television signals was carried out under the new company called TV5MONDE, except for that of the signal broadcast in Canada, which continues to be managed by TV5QC.

TV5MONDE is a private corporation incorporated under French commercial law with headquarters in Paris, France. TV5MONDE operates regional signals in eight geographical areas around the world, as well as two specialty channels (Style HD and TiVi5) and multiple platforms distributed on all five continents.

TV5QC, responsible for broadcasting the TV5 content in Canada, is a private Canadian not-for-profit corporation with headquarters in Montréal. Since September 2014, in addition to operating the TV5 signal in Canada, TV5QC has been operating the UNIS signal under the same operating licence with mandatory distribution status across the country. The mission of this complementary signal is to provide Francophones and Francophiles with television that represents a true reflection of Canada's Francophone communities. Although UNIS is not funded by the federal government, the signal plays a role in broadcasting Canadian Francophone content in Canada. The arrival of UNIS has therefore had an influence on certain indicators that also serve to measure the performance of PCH's TV5 Program.

2.1. Operation, Program objectives and expected outcomes

The purpose of Canada's involvement in TV5 is:

- to contribute to Canada's international visibility by offering Francophone Canadian artists and producers a prominent showcase in the international audiovisual market (TV5MONDE); and
- to offer Canadians a cross-cultural perspective on the Canadian and international Francophonie by leveraging the TV5 signal in Canada, whose programming includes a large share of Francophonie programming not available on other French-language Canadian channels (TV5QC).

The grant to TV5MONDE is awarded in euros and primarily aims to:

- ensure the presence of TV5MONDE on multiple platforms⁴ in order to increase the visibility of the Francophonie and provide more than 300 million households around the world and millions of Internet users, Francophones and Francophiles, access anytime and anywhere to diverse and original Francophone content from all across the Francophonie, including Canada.

4. Simultaneous cross-use of devices, whether complementary or not, is what is referred to as "multiplatform." For example, it is increasingly common to check one's cell phone while watching TV or to view an online video while working on one's laptop. Tapp, F-E., "L'industrie canadienne à l'ère du numérique : l'invasion du multi-écrans," Master's thesis submitted to the Faculty of Graduate and Postdoctoral Studies, University of Ottawa, 2014: 34.

The contribution to TV5QC aims primarily to:

- promote the creation of content that highlights Canada’s cultural vitality while providing 10 million Canadian households from all the regions of the country with access to programming and original online content from the Canadian and international Francophonie;
- enrich its broadcast platforms with questionnaires, games, video segments and content that promotes French language learning; and
- enrich TV5MONDE’s schedules and platforms with Canadian content through the release of rights to this content. TV5QC manages, for the Quebec and Canadian governments, the budget allocated for releasing Canadian programming rights for broadcast on TV5MONDE.

PCH’s TV5 Program manages the Government of Canada’s financial contribution to TV5 and targets the following populations:

- television viewers, Francophone Internet users and Francophiles;
- the operators TV5MONDE and TV5QC;
- Canadian and foreign audiovisual producers;
- Canadian and foreign broadcasters;
- digital content creators;
- audiovisual artisans;
- artists.

The logic model describing the activities, outputs and expected outcomes of PCH’s TV5 Program can be found in Appendix A of the report.

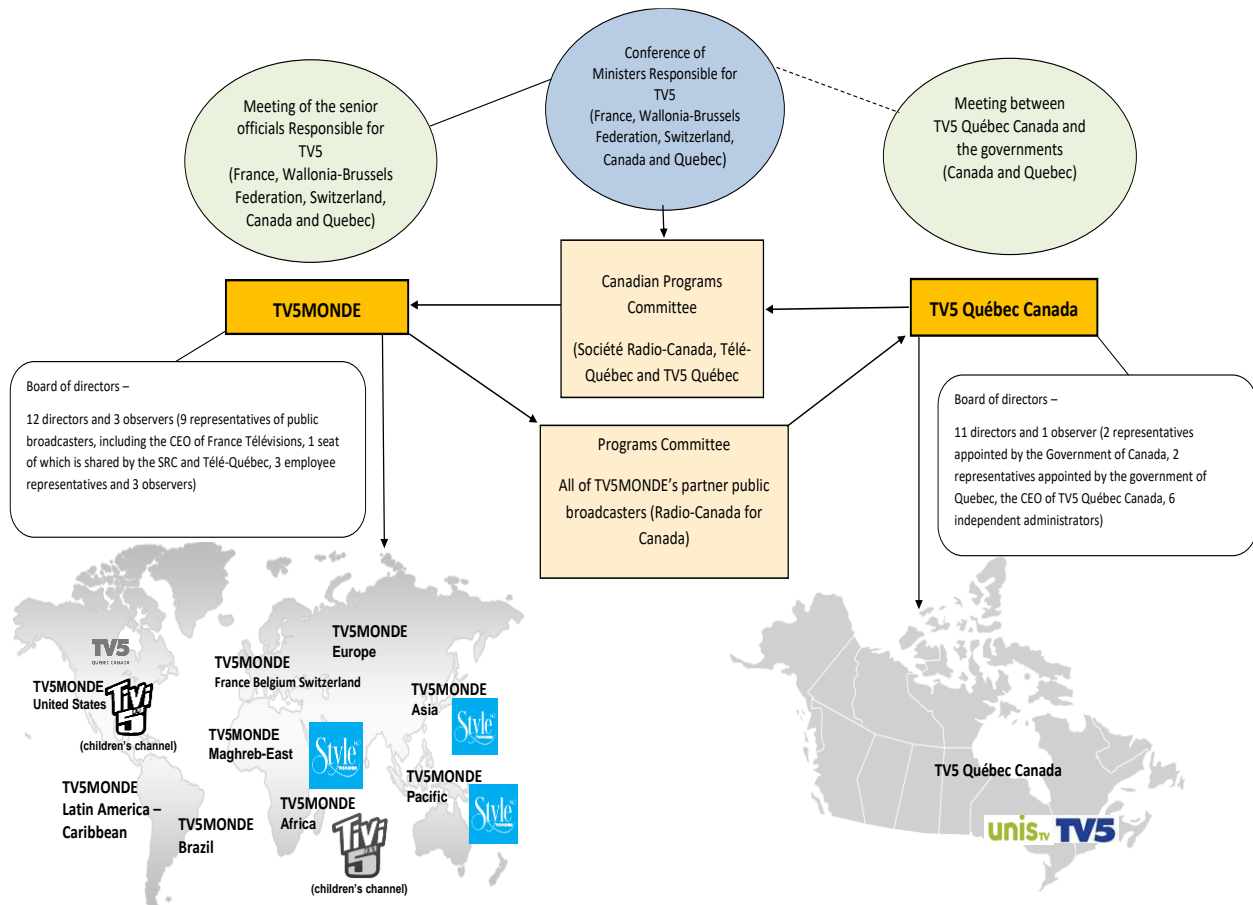
2.2. Management and governance⁵

PCH’s TV5 Program manages the Government of Canada’s financial contribution to TV5. In addition to providing financial support to the two recipients TV5MONDE and TV5QC, the Program manages the diplomatic aspect of the Program by keeping close ties with the partner governments and other key stakeholders (public television channels and Global Affairs Canada). As a result of changes at PCH, management of the TV5 Program was transferred in 2011 from the International Affairs Sector to the Cultural Affairs Sector, more specifically the Strategic Policy and Management Directorate.

The TV5 Charter establishes the partnership structure (see diagram below) as well as the parameters that define the operators’ activities and the expectations of the funding governments, including the Government of Canada.

5. This section summarizes the key management and governance aspects specific to the Program and the TV5 partnership. Please refer to Appendix E for more details.

Figure 1: The TV5 partnership's governance structure



The Conference of Ministers Responsible for TV5 determines the broad directions of the TV5 Partnership. The person who is designated as the Minister of PCH represents the Government of Canada. When the Conference of Ministers is unable to meet, it delegates its role to the annual meeting of the senior officials from the funding governments. The Senior Assistant Deputy Minister of Cultural Affairs of PCH represents the Government of Canada. The TV5 television network is managed by two operators, TV5MONDE and TV5 Québec Canada, both of which also have their own governance structure. Both operators are legally liable editorially and have ultimate control over their respective organizations and programming. The operators participate in the work of the Conference of Ministers and the annual meeting of senior officials responsible for TV5.

TV5MONDE is broadcast in eight geographical areas and also operates special interest channels, including Style HD, which are distributed to signals in Asia, Maghreb-East and the Pacific, and the children's channel Tivi5Monde in the United States and Africa. TV5MONDE receives funding, in euros,

from five funding governments based on a nine-part formula: 6/9 France, 1/9 Wallonia-Brussels Federation, 1/9 Switzerland, 1/9 Canada (60%) and Quebec (40%) jointly. Funding by partner governments accounts for more than 90% of TV5MONDE's total budget. TV5MONDE's board of directors consists of 12 directors and 4 observers.

TV5QC, headquartered in Montréal, is responsible for broadcasting the TV5 signal in Quebec and elsewhere in Canada. TV5QC is a private corporation under the *Canada Not-for-profit Corporations Act*. Its business model relies on it operating the broadcasting licence, renewable every five years, for the TV5 and UNIS signals in Canada, which has a mandatory distribution order that generates revenues through subscription fees. There is no government amount dedicated to UNIS. TV5QC's board of directors consists of 11 directors and 1 observer. At the annual meeting between TV5QC and the governments of Quebec and Canada, TV5QC presents its annual results to the representatives of the funding governments of Quebec and Canada. Representatives of the TV5 Program, PCH and the government of Quebec's Ministère de la Culture et des Communications [Department of Culture and Communications] and Ministère des Relations internationales et de la Francophonie [Department of International Relations and La Francophonie] participate in the meeting. The operator TV5QC manages the budget allocated to the release of rights to Canadian programs for broadcast on TV5MONDE. The Canadian Programs Committee, consisting of TV5QC, Radio-Canada and Télé-Québec, selects the Canadian programs that are presented for consideration to TV5MONDE.

2.3. Resources

PCH's TV5 Program has had a permanent annual budget just over \$11 million since April 2014 (see Table 1). Between 2009–10 and 2013–14, it was \$13.4 million due to additional funding announced by the Government of Canada during the Summit of La Francophonie in 2008.

The budget covers the Program's operating costs, the grant to TV5MONDE, the contribution to TV5QC and funding for the release of rights to Canadian programs (export budget). The budget includes:

- Human Resources from the Department of Canadian Heritage (~\$200,000), 1.5 full-time equivalents (FTEs);
- Operations and maintenance (~\$60,000);
- A grant to TV5MONDE (€5,020,000, about \$7.78M);
- A contribution to TV5QC (\$1.38 million for operations); and
- The release of rights to Canadian programs for broadcast on TV5MONDE (\$1.46 million).

The rest of the funding, that is, about \$1 million, serves to offset the fluctuating exchange rate, fund special projects⁶ and respond to any unforeseen circumstances. Table 1 lists the financial resources, in Canadian dollars, allocated to the Program.

Table 1: TV5 Program’s planned financial resources per year⁷ (in Canadian dollars)

	2014-15	2015-16	2016-17
Personnel	\$198,047	\$200,737	\$203,577
Operations and maintenance	\$60,329	\$63,942	\$60,125
Subtotal	\$258,376	\$264,679	\$263,702
Grants	\$8,000,000	\$8,000,000	\$8,000,000
Contributions	\$2,960,900	\$2,960,900	\$2,960,900
Subtotal of grants and contributions	\$10,960,900	\$10,960,900	\$10,960,900
Total for the Program	\$11,219,276	\$11,225,579	\$11,224,602

Source: PCH Financial management Branch

3. Approach and methodology

3.1. Evaluation objectives

The evaluation assesses the relevance, effectiveness and efficiency of the Department of Canadian Heritage’s TV5 grant and contribution program from 2011–12 to 2016–17. It was conducted in accordance with the Treasury Board of Canada Secretariat’s *Policy on Results* (2016) and the Departmental Evaluation Plan 2016–17 to 2020–21. The results of the evaluation will enable PCH’s senior management to make decisions about the policy and design directions of the Program.

3.2. Scope, timing and quality control

The evaluation was conducted by the Evaluation Services Directorate, with support from the PCH Policy Research Group as well as a consultant firm.

3.3. Evaluation questions

An evaluation framework was developed to support the evaluation. All of the questions in the evaluation framework can be found in Appendix B.

6. For example, the Program provided \$500,000 for technological changes caused by the digital shift for two years during the evaluation period.

⁷ Financial data for 2011-2012 to 2013-2014 are not available. Furthermore, personnel costs include salaries and the employee benefit plan (EBP).

3.4. Data collection and analysis methods

The following data collection methods were used:

Program document and file review

More than 220 documents were included in the document and file review conducted to answer the evaluation questions. PCH's evaluation team compiled the relevant information from the documents in an Excel matrix, which in turn underwent a summary analysis. The documents used in this exercise included strategic plans and updates, meeting minutes and reports, performance measurement frameworks, and departmental and governmental documents (e.g., budgets and financial statements). The documents that support the evaluation findings are listed in the bibliography in Appendix D.

Program database review

More than 60 files were consulted as part of the database review. The data associated with the Program included information on airtime and other statistical data specific to the Program. The data were compiled in a compendium and classified under each evaluation question to facilitate analysis. The analysis was based on the compendium, including the creation of graphs to present the results.

Literature review

The PCH Policy Research Group conducted a literature review as part of the evaluation. Information from more than 110 relevant documents was compiled in a detailed report on the current context of the Program, providing a picture of the production and distribution of media content in Canada. Among other things, the report covers emerging challenges, such as the shift to digital, and future prospects for both general interest channels and specialty channels such as TV5.

Key stakeholder interviews

A series of interviews was conducted with 22 key stakeholders associated with the Program (e.g., managers and personnel at PCH, members of the boards of directors of TV5QC and TV5MONDE); representatives of Canadian broadcasters (Radio-Canada and Télé-Québec); and representatives of the federal government, the government of Quebec and other funding governments (France, Switzerland and the Wallonia-Brussels Federation). Four interviews were also conducted with broadcasting and media consumption experts.

Triangulation and analysis

The information collected for each source of data was recorded in a matrix, organized by evaluation question and performance indicator. The data in each matrix were then coded and grouped in a matrix, which made it possible to triangulate the information gathered and develop the findings.

3.5. Constraints, limitations, and mitigation strategies

The evaluation's main limitation was the availability of certain quantitative data. Data for some of the performance indicators were not available for each year, including data for 2016–17, because the Program had not received TV5MONDE's annual report at the time of data collection. This constraint was mitigated by the abundance of performance measurement data on the immediate outcomes from TV5.

In addition, data that make it possible to measure outcomes, such as audience ratings, were not collected by TV5MONDE because costs were too high, and because no data were available in some of the countries and territories reached. It is therefore not possible to know how many people watch Canadian French-language programming abroad. Moreover, quantitative data on TV5MONDE content consumption via digital media platforms and on costs associated with production and uploading of digital content were not available for all the years of the evaluation period. The evaluation mitigated this constraint by using media studies to fill the gaps.

Most of the interviews were conducted with key respondents associated with the Program. Four external experts with extensive experience in the field of broadcasting, including broadcasting in the Francophonie, took part in the interviews. It is thus possible that the interview results may have introduced some bias. However, as a mitigation measure, the evaluation team recruited respondents with a relatively broad range of profiles and the interviews were triangulated with the other methods, such as the quantitative data, document and literature reviews.

4. Findings

4.1. Relevance

This section presents the evaluation results with respect to the continued need for the grant and contribution Program, alignment with the federal government's priorities and PCH's essential responsibilities and with the federal government's role and responsibilities.

4.1.1. Relevance: Continued need for the Program

Evaluation question 1: Is the Government of Canada's participation in TV5⁸ still relevant in the context of the current Francophone audiovisual space?

Key findings:

Canadian participation in TV5 remains relevant, as it promotes Francophone culture in Canada and around the world. TV5, like other channels, is having to deal with the dynamics of the digital shift: the audiovisual space is constantly evolving and there is a shift in media consumption habits among young people under 30, who are increasingly using digital media. PCH's TV5 Program, through its financial contribution and participation in governance structures, encourages the channel to respond to the digital shift and to changes in media consumption habits, which pose major challenges in the visual space.

One challenge that arose from the evaluation is that the costs of producing television content and the cost of releasing Canadian programming rights for broadcasts have increased in recent years while the export budget has remained the same.

The digital shift

All the data sources indicate that the digital shift poses a major challenge to TV5. According to stakeholders, it is crucial to adapt to the digital shift because of changes in viewing habits, especially in people under 30, and the increasing number of sources of audiovisual programming available. Stakeholders primarily mentioned an increase in Web content, the viewing of programs on demand (e.g., Netflix, YouTube), multiplatform offering and a broader audiovisual selection for audiences. According to data from TV5MONDE, the number of online videos viewed monthly rose from 1 million to 5 million between 2010–11 and 2015–16. As regards visits to all the TV5QC platforms, administrative data indicate that the number of average monthly visits increased from 88,000 in 2008–09 to 214,000 in 2015–16.

Both the document review and the literature review support these assertions. Indeed, TV5MONDE's 2011 annual report notes that the digital revolution has resulted in increasing competition, the

8. TV5 has two operators: TV5MONDE and TV5 Québec Canada.

consequences of which can be felt in all of the channel's areas of activity.⁹ The annual report also notes an impressive development in national channels, particularly in Africa, an explosion in tablet and smartphone app sales, and an increase in content consumption across all forms of media. In its 2012 annual report, TV5MONDE indicated that the channel had to have a presence globally across all new forms of media and offer as many programs on demand and as much catch-up TV as possible, in line with the practices of each market.¹⁰

According to the Canada Media Fund, "the massive arrival of new technologies and new digital media is upsetting the ecosystem of the television industry and is resulting in new challenges for the entirety of its chain of creation, production, distribution and consumption."¹¹ The Fund also notes that young people are revolutionizing television consumption habits. They are offline more, are bigger fans of binge watching, watch more and more online content and watch it on increasingly mobile devices. As such, 23% of Canadians aged 18 to 34 watched online television exclusively in 2016.¹² For example, according to the Media Technology Monitor (MTM), 30% of Francophone Canadians now connect their television sets to the Internet, and in 2017, 28% of them were Netflix subscribers.¹³

That said, according to the TV5QC stakeholders, Canadian Francophones have nonetheless not abandoned traditional television. According to the MTM, 93% of the television hours watched by Quebecers are watched on Francophone channels.¹⁴ According to the stakeholders and experts consulted, federal participation in TV5 is important because the goal is to preserve the French language and Francophone culture and to enable Canada's Francophone communities to get to know each other and mutually enrich one another, as well as to promote Canadian Francophone culture around the world.

Increased production costs

The stakeholders noted that production costs have increased in Canada, especially for fiction series. Quantitative data show that average hourly production costs for fiction series rose from \$7,251 in 2009 to \$8,101 in 2016 (see Figure 2 below). Some respondents claimed that TV5 does not have enough money for a digital transformation or to buy better quality content to broadcast during prime time. The stakeholders also noted that the cost of releasing the rights to programs is increasing, while the export budget has remained the same (at approximately \$2.340 million¹⁵ since 2009).

9. TV5MONDE, Rapport annuel [Annual report], 2011: 7.

10. TV5MONDE, Rapport annuel [Annual report], 2012: 2.

11. Briceno, C. et al., "[Trends Report. The Digital Puzzle: Piecing Back Together the Content Value Chain](#)," Canada Media Fund, 2017.

12. Desjardins, D., "[CRTC's 2017 Communications Monitoring Report: the Steady Rise of Internet TV](#)" [Online], Canada Media Fund, 2017, page consulted on January 15, 2018.

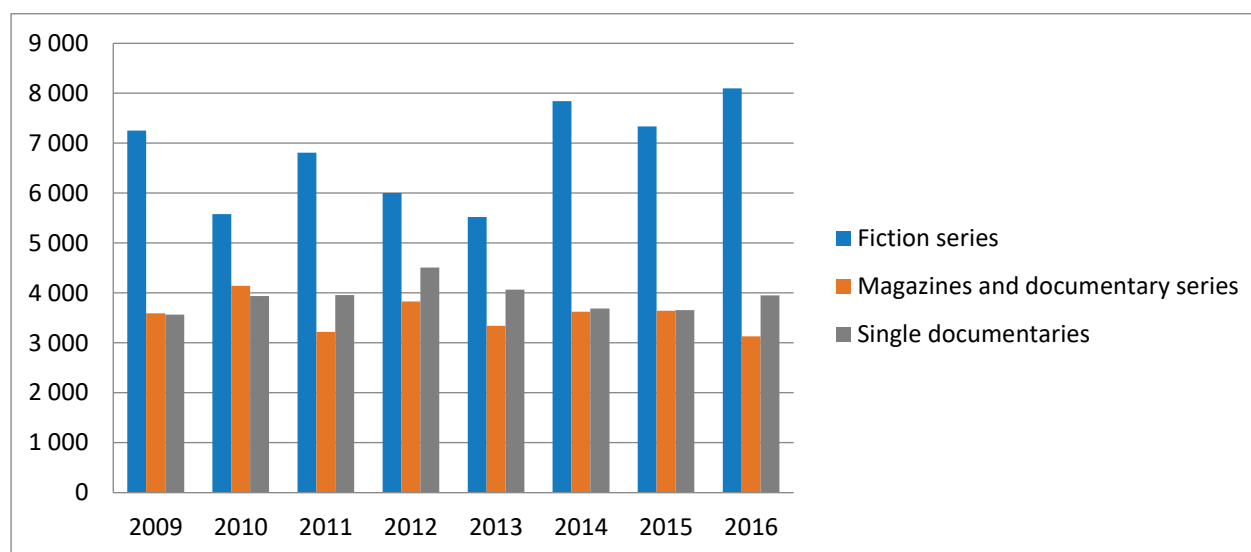
13. Media Technology Monitor, "Media technology adoption – Analysis of the French-language market: Spring 2017," CBC/Radio-Canada, 2017: 14.

14. Allen, M., "TV in Transition," Media Technology Monitor, 2016: 42.

15. This amount represents the sum of the combined contributions by Canada and Quebec.

In 2017, TV5QC, which manages the export budget, introduced a new fee schedule for acquiring rights from Canadian producers. The old fees were lower than the going rate and TV5QC was at risk of no longer being able to compete with other broadcasters if it continued to pay Canadian producers less than the market rate. The document review revealed that the number of Canadian programs proposed to TV5MONDE had to be decreased after the new fee schedule was introduced. The Program's administrative data indicate that because TV5QC lacks the budget to release the rights, it was not able to give TV5MONDE all of the Canadian programs it requested in 2017 (e.g., documentaries, magazines and children's programs), for an estimated amount of \$600,000.

Figure 2: Production costs in Canada – average cost per hour (in Canadian dollars)



Source: Canadian Heritage, TV5 Program.

PCH is aware of these issues and notes in its Performance Measurement, Evaluation and Risk Strategy (PMERS) that “[Translation] it is necessary to study options for renewing the Program in order to support the recipients in the face of the emerging issues.”¹⁶ The stakeholders have argued that if the trend continues, it could translate into a decreased number of Canadian Francophone productions broadcast on TV5MONDE channels in the future, the distribution of lower-quality content, or a lack of interest in the channel resulting from a lack of diversity in the content.

4.1.2. Relevance: Alignment with the federal government's priorities and the Department's essential responsibilities

Evaluation question 2: To what extent are the Program's objectives compatible with the federal government's priorities and the Department's strategic objectives?

Key findings:

16. Canadian Heritage, “PMERS,” July 2016: 32 [available in French only].

The objectives of the PCH's TV5 Program are aligned with PCH priorities and strategic objectives. They contribute to the strategic outcome wherein "Canadian artistic expressions and cultural content are created and accessible at home and abroad."

The document review shows that the TV5 Program contributes to PCH's priorities and strategic objectives through its objectives and outcome. The 2012–13 Report on Plans and Priorities of the Department of Canadian Heritage¹⁷ indicates that the purpose of supporting cultural industries, of which TV5 is a part, is "to ensure that a range of Canadian cultural content is produced and made accessible to domestic and international audiences." It also aims "to enable Canadian creators and cultural entrepreneurs to produce, market and export Canadian cultural content."

The PMERS clearly notes that the TV5 Program objectives are aligned with the government's priorities by directly contributing to the strategic outcome wherein "Canadian artistic expressions and cultural content are created and accessible at home and abroad" through a grant to TV5MONDE and a contribution to TV5QC.¹⁸ By broadcasting Canadian content here and elsewhere, the TV5 Program is aligned with the objectives of the second pillar of the federal government's new Policy Framework, "Creative Canada," which aims to promote discovery and distribution on a national and international scale.

For its part, the 2016–17 Report on Plans and Priorities indicates that the TV5 Program "enables Canadian productions to be presented around the world through TV5MONDE. Moreover, through TV5QC, it provides Canadians with access to a rich diversity of programming from the international Francophonie." According to the document, "TV5 contributes to the organizational priority Engage and Innovate: Canada's Creative and Cultural Industries Drive Canada's Economic Growth by reaching viewers where they are, on the platform they wish to use."¹⁹

The stakeholders feel that Canada's commitment to TV5 is a federal government priority in relation to the international Francophonie. Although the responsibility falls under Global Affairs Canada, some respondents indicated that developing the Francophonie is part of the Minister of Canadian Heritage's portfolio. The stakeholders also mentioned that although the TV5 Program has a limited influence on the development directions of the two operators, the Government of Canada's participation in TV5 remains relevant because the Program participates in discussions and encourages certain innovations through its governance structure.

17. Canadian Heritage, "Report on Plans and Priorities," 2012–13 pp. 19 and 4.

18. Canadian Heritage, "PMERS," July 2016, p. 4 [available in French only].

19. Canadian Heritage, Report on Plans and Priorities 2016–17, pp. 44–45.

Most of the key respondents questioned as part of the evaluation felt that the collaboration between Canada and the other countries of the Francophonie as regards TV5 made it possible to influence the partner governments and to advance Canada's priorities.

4.1.3. Relevance: Alignment with the federal government's roles and responsibilities

Evaluation question 3: What are the federal government's role and responsibilities with respect to the Program objectives?

Key findings:

Broadcasting is considered a public service essential to the cultural construct of Canada, its unification and its emancipation. The federal government therefore has a role to play in financing the production and broadcast of television and digital content both in Canada and abroad. Moreover, through PCH's TV5 Program, the Government of Canada meets its commitments under the TV5 Charter, of which it is a signatory, and enables TV5 to carry out its mission.

The literature review reiterates the federal government's responsibility to the media, which are deemed to be in the public interest to the extent that they are characterized by the functions of "information, education, entertainment and advertising [and they] structure the agenda of social debates, allow us to share experiences, and provide us with most of the knowledge of the world in which we live."²⁰

Broadcasting is therefore considered essential to the cultural structure of Canada, its unification and its emancipation. According to researcher S. Claus, Canada began an interventionist policy in the 1920s with the objective of strengthening national identity for a country in search of cultural emancipation, which is ongoing.²¹ The federal government therefore has a role to play in financing the production and broadcast of television and digital content both in Canada and abroad.

The role of the federal government in achieving the Program objectives is broadly outlined by the TV5 Charter, of which Canada is a signatory. It fulfills its role through its funding of TV5 and its participation in the TV5 decision-making bodies, such as the Conference of Ministers and annual meeting of senior officials. Moreover, it is represented on TV5MONDE's board of directors by its public broadcaster (Radio-Canada), and the PCH Minister appoints 2 of the 11 members of TV5QC's board of directors.

Furthermore, a review of the PMERS demonstrates that PCH's financial support enables TV5 to achieve its mission. The allocated funds serve to support TV5 activities that promote cultural diversity by serving

20. Claus, S. "[Canadian Broadcasting Policy at Issue: From Marconi to Netflix](#)" [Online], CRTC, 2017, page consulted on February 2, 2018.

21. Claus, S. "[Canadian Broadcasting Policy at Issue: From Marconi to Netflix](#)" [Online], CRTC, 2017, page consulted February 2, 2018.

as a window to the entire Francophone world. The funds enable exchanges between Francophone countries and the international export of Canadian Francophone productions. Through its involvement in the network, Canada is also contributing to a structure of multilateral collaboration between the funding governments. Overall, support from Canada and the other funding governments enables the channel to promote the expression of Francophone audiovisual and cinematographic creativity, a coherent goal that is in alignment with Canada's cultural objectives.

4.2. Effectiveness: Achievement of expected outcomes

This section presents the findings of the evaluation as they relate to the achievement of the immediate, intermediate and final expected outcomes.

4.2.1. Is the TV5 Program achieving the immediate outcomes anticipated?

Immediate outcome 1: Contribute to the implementation of the strategic directions and guiding principles of the two channels, in accordance with the TV5 Charter

Key findings:

Canada's financial contribution, managed by PCH's TV5 Program, supports the development of the TV5MONDE and TV5QC strategic frameworks, and its participation in TV5's decision-making bodies allows it to exert a degree of influence on its priorities.

The two operators have a responsibility to implement their strategic plans and report to the funding governments on an annual basis. The operators' annual reports paint a positive picture of the achievements that were accomplished during the evaluation period. However, the cyber-attack on TV5MONDE in April 2015 slowed the implementation of the 2014–16 strategic plan and, according to some stakeholders, may even have threatened the very existence of the channel. Thanks to the recovery plan, however, TV5MONDE managed to achieve the essential parts of its strategic plan.

Under the TV5 Charter, both operators are responsible for implementing their strategic plans and producing annual reports on its implementation.²² According to the document review and the stakeholders, every two years TV5MONDE and TV5QC produce strategic plans that are submitted to senior officials of the funding governments at their annual meeting.

22. It should be noted that, as an exception, TV5MONDE did not produce a strategic plan in 2013. The previous plan covered the years 2009–12 and the subsequent one covered the years 2014–16. In October 2012, TV5MONDE's funding governments approved the proposal by the Finance Commission to postpone the adoption of the strategic plan by a year. In 2013, TV5MONDE was mandated to develop a budget project focused on implementing a new technical system.

According to the key respondents representing PCH's TV5 Program, at senior officials' meetings, the activities proposed in TV5MONDE's strategic plan are prioritized based on the available resources. During these meetings, the partner governments may exert some influence on TV5's strategic directions. For example, Canada has stressed the importance of implementing measures to adapt to the digital shift and of placing emphasis on broadcasting in Africa.

The operators' annual reports paint a positive picture with respect to the achievements and strategic plan implementation by TV5MONDE and TV5QC during the evaluation period, which is supported by the stakeholders and the quantitative data.

TV5MONDE was the victim of a cyberattack in 2015. This attack, unprecedented in the history of television, caused the TV5MONDE broadcast to stop and messages of support for the Islamic State to be published on its social media networks. In the document review, it is reported that the attack cost TV5 more than 5 million euros (about \$7.5 million) in the first year and 3 million euros (about \$4.5 million) the following year. According to stakeholders, the attack could have had consequences for the very survival of TV5MONDE.

The Government of Canada, like the other funding governments, supported TV5MONDE's recovery plan and contributed additional funds in the amount of 510,000 euros, or about \$765,000, in 2016 to help achieve it. According to TV5MONDE's 2016 annual report, despite the cyberattack that mobilized considerable resources and affected the channel's digital presence, the essential parts of its strategic plan were achieved.

Immediate outcome 2: Broadcast of the TV5 signal and multiplatform broadcast in Canada, presence of Canadian programming on TV5MONDE and broadcast of programs from the Francophonie in Canada.

Key findings:

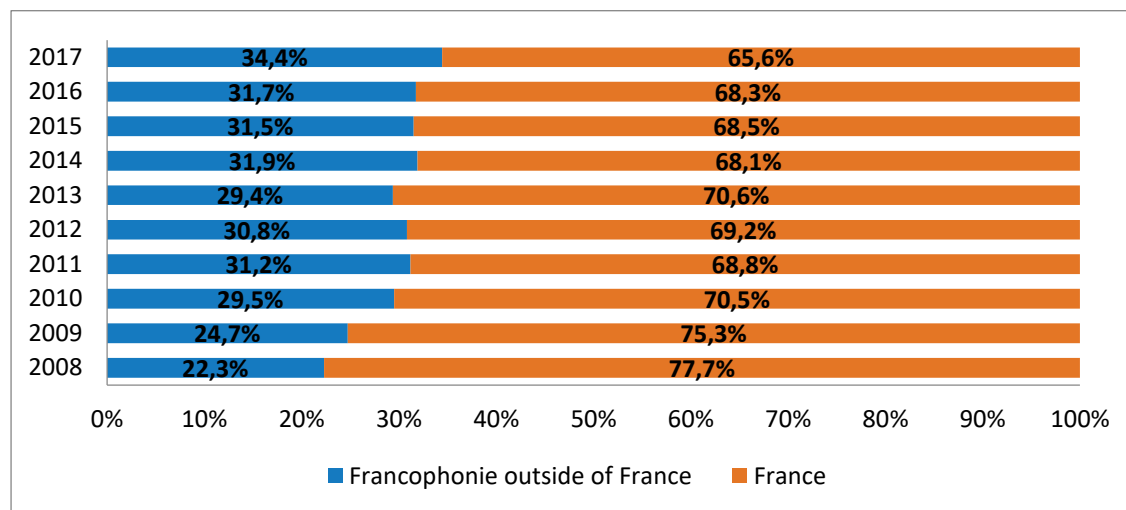
The financial contributions of the governments of Canada and Quebec have enabled TV5MONDE and TV5QC to broadcast their respective television signals and to publish audiovisual content on multiple platforms. Moreover, TV5QC has provided TV5MONDE with programs for broadcast on its various signals around the world and broadcast programs from the Francophonie in Canada.

Various data sources show that TV5MONDE broadcasts Francophone programming in eight geographic regions, and that TV5QC provides access to Francophone content in Canada via cable providers. Both channels also broadcast content on their respective digital platforms.

The document review revealed that TV5MONDE's offering improved after France Télévisions and TV5MONDE collaboration in 2014. The channels of the group France Télévisions provide TV5MONDE with access to 22,000 hours of programming each year for broadcast around the world.²³

The Program's quantitative data also show a rise from 22.3% to 34.4% in programs produced outside of France broadcast on TV5MONDE between 2008 and 2017, which increased access to greater cultural diversity (see Figure 3 below).

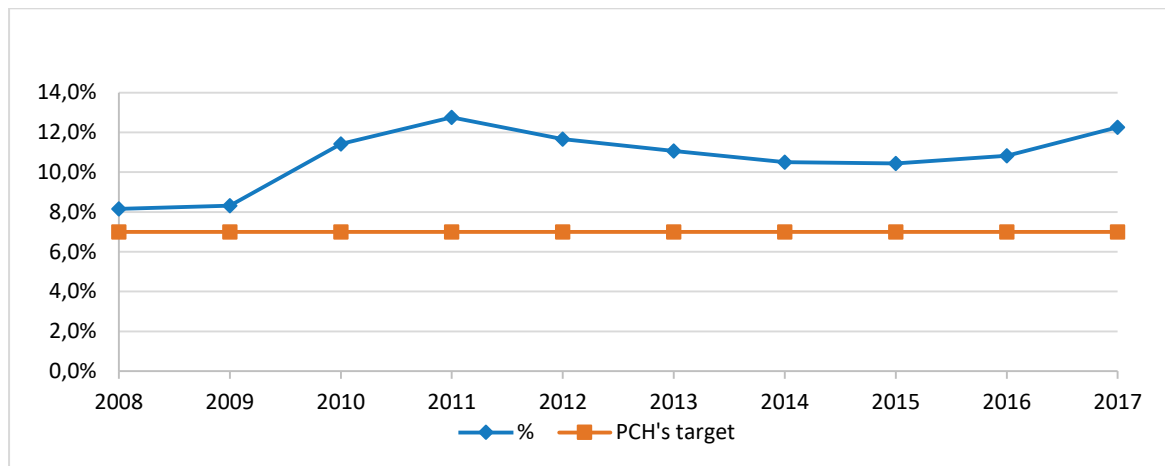
Figure 3: Percentage of programs from the Francophonie outside of France (2008–17)



The financial contributions of Canada and Quebec, as partners of TV5MONDE, made it possible to maintain the presence of Canadian content in all the regions of the world. The percentage of Canadian content abroad remained between 10% and 12% (above the 7% target) for the evaluation period.

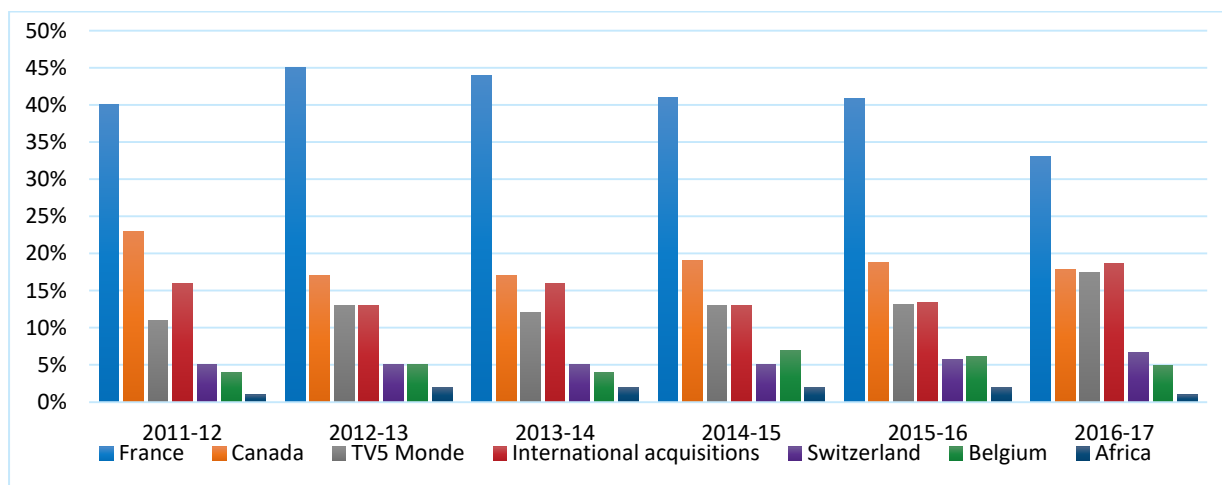
23. Press release, "Partenariat TV5MONDE France Télévisions," 2014, p. 3.

Figure 4: Change in percentage of Canadian content broadcast on TV5MONDE (2008–17)



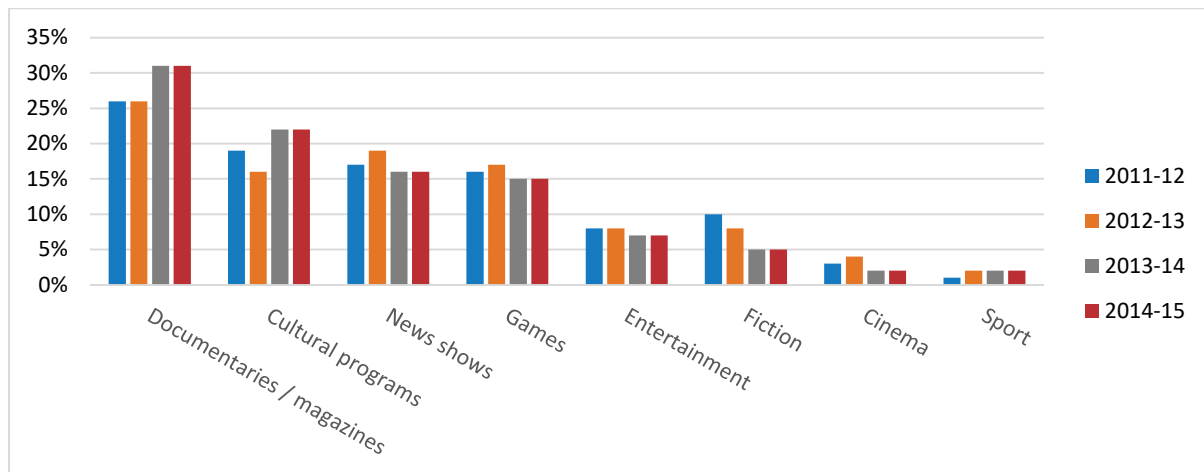
Canadian participation in TV5 also made it possible to broadcast programming from the Francophonie in Canada, as stated in the TV5 Charter. Quantitative data show the origin of the programs aired by TV5QC. The majority of them are produced in France, as illustrated below in Figure 5.

Figure 5: Origin of the programs aired on TV5QC between 2011–12 and 2016–17



In Canada, since September 1, 2013, the CRTC licence requires that TV5QC and UNIS jointly broadcast a minimum combined percentage of 50% of Canadian content. As for UNIS, on air since 2014, at least 75% of its content must be of Canadian origin. Moreover, a mandatory order requires that TV5QC and UNIS be broadcast in all of Canada. These requirements ensure that Francophone content from here and abroad is broadcast across Canada. According to stakeholders, 85% of foreign Francophone content aired in Canada is featured on TV5QC. The categories of programs produced abroad that air on TV5QC include cultural programs, documentaries, magazines, fiction series, children's series, sports and cinema (see Figure 6 below).

Figure 6: Categories of non-Canadian programs broadcast by TV5QC between 2011–12 and 2014–15²⁴



Based on the literature review and quantitative data, both operators increased their digital broadcasting offering during the evaluation period. For example, UNIS and TV5QC offer catch-up TV on their digital platforms and provide interactive online tools for learning French. However, data on the content viewed on the digital platforms were very limited for the evaluation period.

Immediate outcome 3: Broadcast of TV5MONDE's signal and multiplatform broadcast in eight geographical areas, broadcast of Canadian programming in eight geographical areas, and access to the Francophonie's stock of programs.

Key findings:

Quantitative data show an increase in the number of hours of Canadian content broadcast on TV5MONDE since 2013. The addition of signals in new geographical areas and specialty channels and programs for learning French contributed to these results.

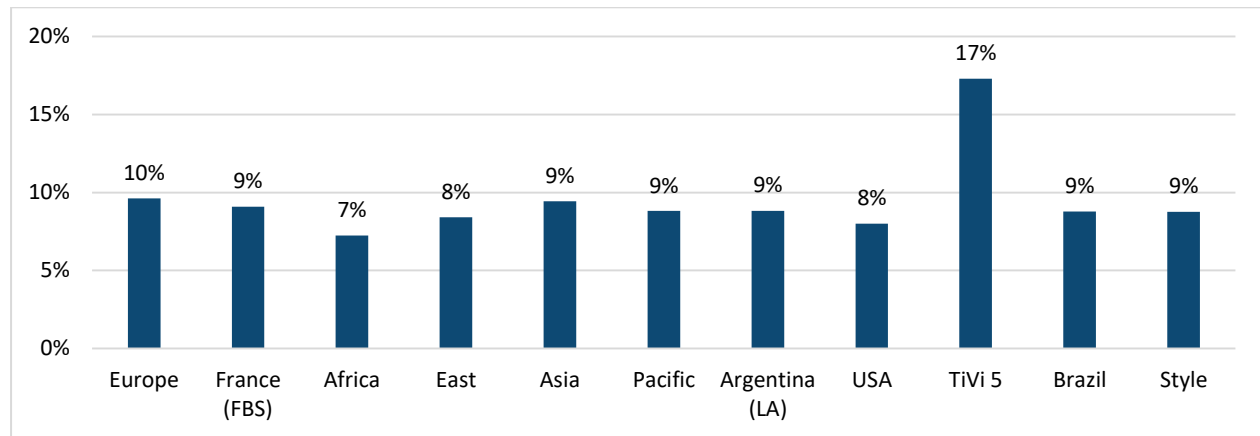
The export budget has made it possible to release Canadian broadcasting rights.

The following figure provides an overview of the percentage of Canadian programming broadcast per region between 2011 and 2016. Quantitative data show that the Tivi5 MONDE signal, a children's channel, aired more Canadian Francophone content than the other channels, coming in at 17%, while the percentage of Canadian content on the other signals fluctuated between 7% and 10%. Note that Tivi5 MONDE is only broadcast in the United States and Africa, so there are fewer cultural restrictions

24. Data from 2015–16 and 2016–17 are not included in the figure due to the changing and merging of certain program categories.

with respect to Canadian content compared with other geographical areas in the world. That would explain why that programming is broadcast more.

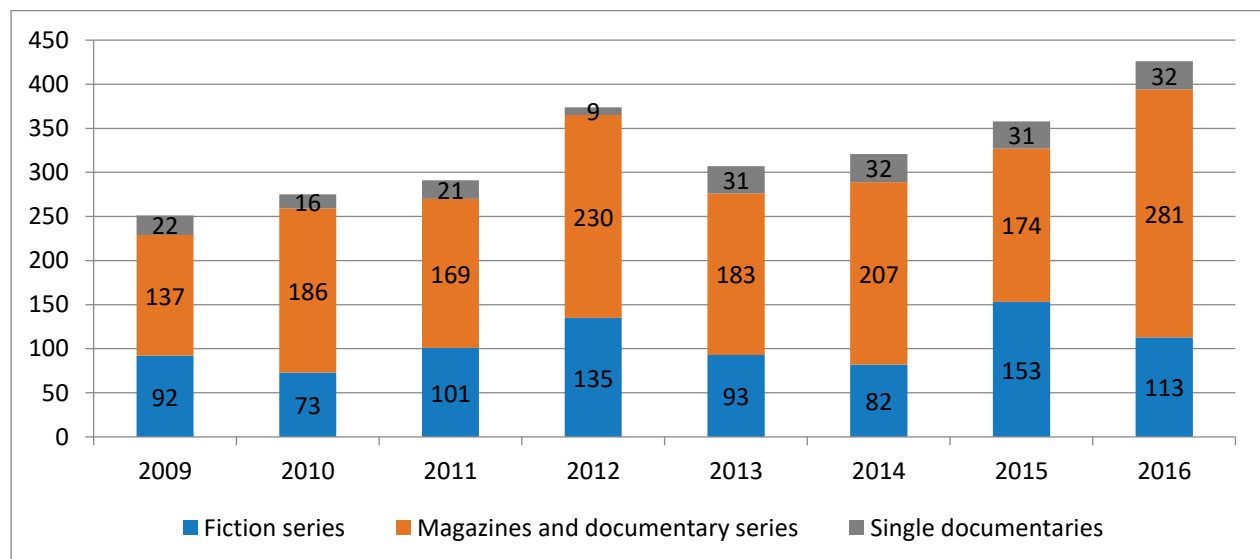
Figure 7: Percentage of Canadian content broadcast on TV5MONDE per region from 2011 to 2016



Source: Canadian Heritage, TV5 Program

The Program's quantitative data show an increase in the number of hours of Canadian content broadcast on TV5MONDE since 2013, particularly for magazines and documentary series (see Figure 8 below). Despite the fluctuations seen for single documentaries and fiction series, there was an increase from 2011 to 2016.

Figure 8: Number of hours of Canadian content broadcast on TV5MONDE, by type of content, from 2009 to 2016

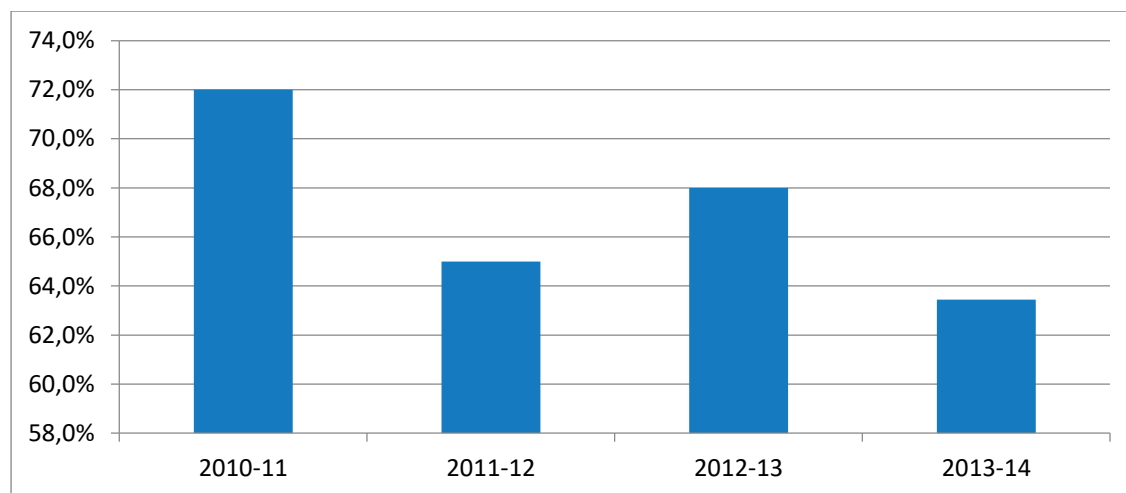


Source: Canadian Heritage, TV5 Program

Under the TV5 Charter, the participating countries must provide both operators with a stock of programs cleared of rights. PCH's TV5 Program enabled TV5QC to provide TV5MONDE with many programs cleared of rights. However, as was mentioned above, according to the stakeholders and the administrative data, the cost of releasing programming rights for broadcast has increased in recent years, while the export budget has remained the same since 2009. Stakeholders warn that if this trend continues, there is a risk that Canada will not be able to provide a sufficient number of quality programs cleared of rights to position itself favourably on TV5MONDE's channels in the coming years.

The export budget goes in both directions, which means the partners release rights so that their programs can be broadcast in Canada. Certain key respondents from Canada reported difficulties getting partners to release the rights to programs for broadcast on TV5QC. That is the case for the latest European films and for digital broadcasts. Quantitative data show that the percentage of Francophone programming cleared of rights for broadcast on TV5QC decreased during the evaluation period, dropping from 72% in 2010–11 to 63% in 2013–14 (see Figure 9 below).²⁵

Figure 9: Percentage of programs cleared of rights broadcast in Canada between 2010–11 and 2013–14



4.2.2. Is the TV5 Program achieving the intermediate outcomes anticipated?

Intermediate outcome 1: Strategic positioning of Canadian programs in prime time²⁶ in TV5MONDE's programming schedules and on multiple platforms, expansion of the Canadian and foreign audience for programs from Francophone countries.

25. Data were not available for 2014–15 and 2015–16.

26. The traditional indicator of prime time broadcast is taken from the PMERS that was valid for the evaluation period. That said, the increasing ease with which television content can be recorded and consumed online at any time renders this indicator less representative today than it was in 2011.

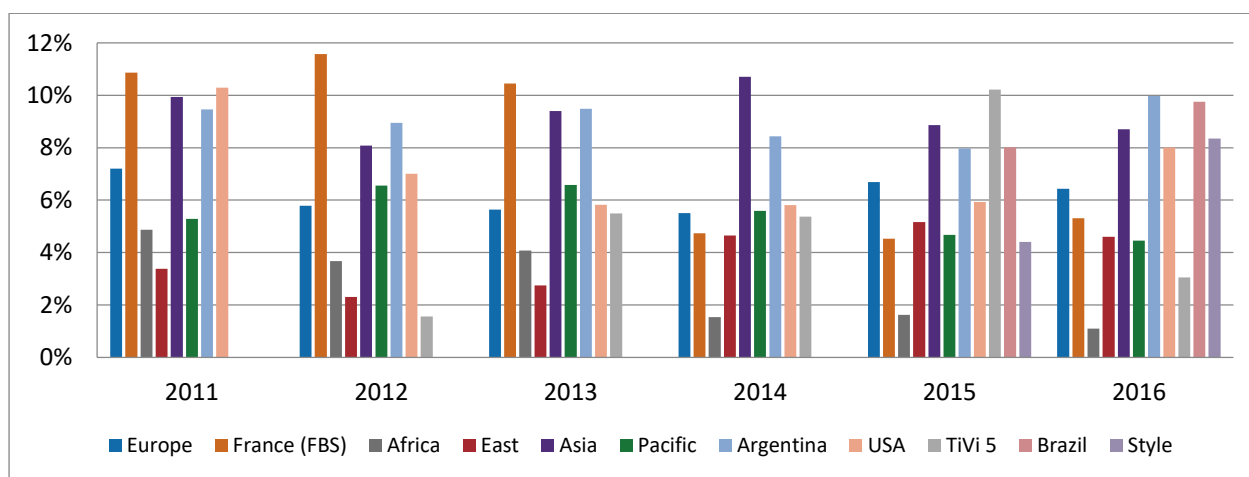
Key findings:

Quantitative data show that between 2011 and 2016, the average percentage of Canadian prime time programming fluctuated. In most regions, the share of Canadian content remained constant or increased slightly over the same period.

In terms of audience growth, the data show an increase from 187 to 318 million households reached by TV5MONDE and 6.5 to 10 million in Canada during the evaluation period. In Canada, audience growth occurred mainly outside Quebec thanks to UNIS (on air since 2014–15), a channel that reflects and supports Canadian Francophone production across Canada.

The Program's quantitative data show that between 2011 and 2016, the average percentage of Canadian prime time programming fluctuated between 5.5% and 7.2% in Europe and between 3% and 9% in the other regions of the world. There were certain variations observed per area; for example, a decrease in France (from 10% to 5%) and in Africa (from 4% to 1%), as well as a slight increase in the East over the same period (see Figure 10 below).

Figure 10: Canadian content broadcast on TV5MONDE per region during prime time (6:00 p.m. to midnight) from 2011 to 2016



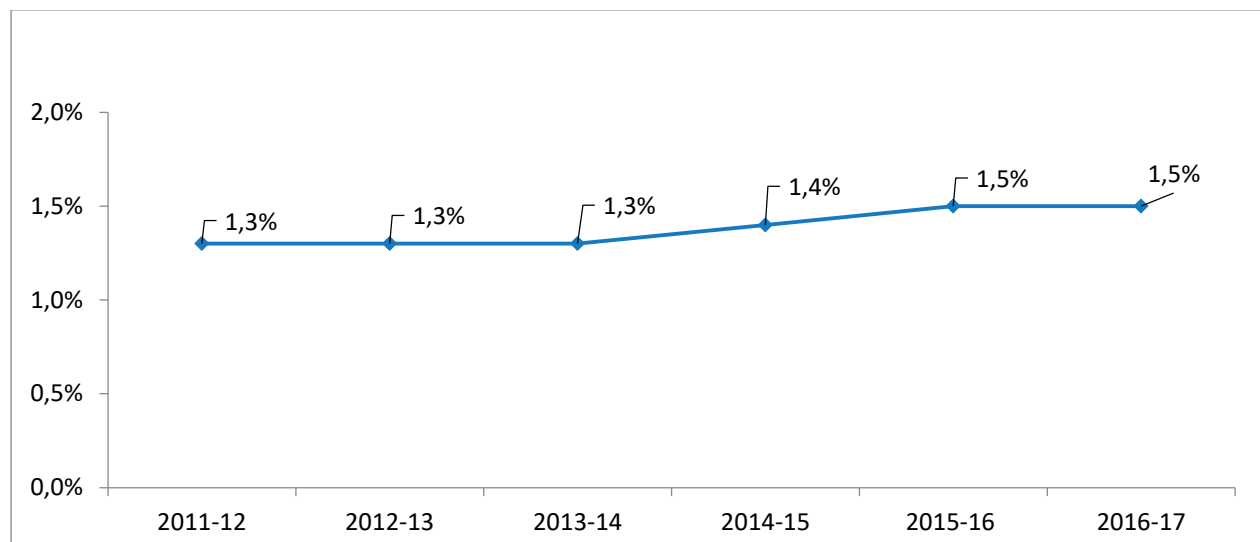
Quantitative data show that a greater percentage of Canadian programming is broadcast during the other programming hours of the TV5MONDE channels (see the figures in Appendix C). A greater share of Canadian content was broadcast in the morning in the various geographical areas during the same period. Canadian content in the afternoon time slot increased slightly between 2011 and 2016 for most signals, except for Africa and Tivi5 MONDE, where a little more fluctuation was noted.

Tivi5 MONDE, which targets children aged 3 to 13, was the channel that aired the highest percentage of Canadian content between 2013 and 2016 (30% at night and in the morning).

As mentioned in the section on methodology, data on TV5MONDE audience ratings are very limited outside of Canada. Certain key respondents noted that although TV5MONDE does not have the ability to collect comprehensive data, some data would be useful in gaining a better understanding of how many people watch Canadian Francophone programming abroad.

According to administrative data, TV5QC maintained its audience ratings among specialty Francophone television channels in Quebec. TV5QC market share increased slightly from 1.3% in 2013–14 to 1.5% in 2015–16 (see Figure 11 below).

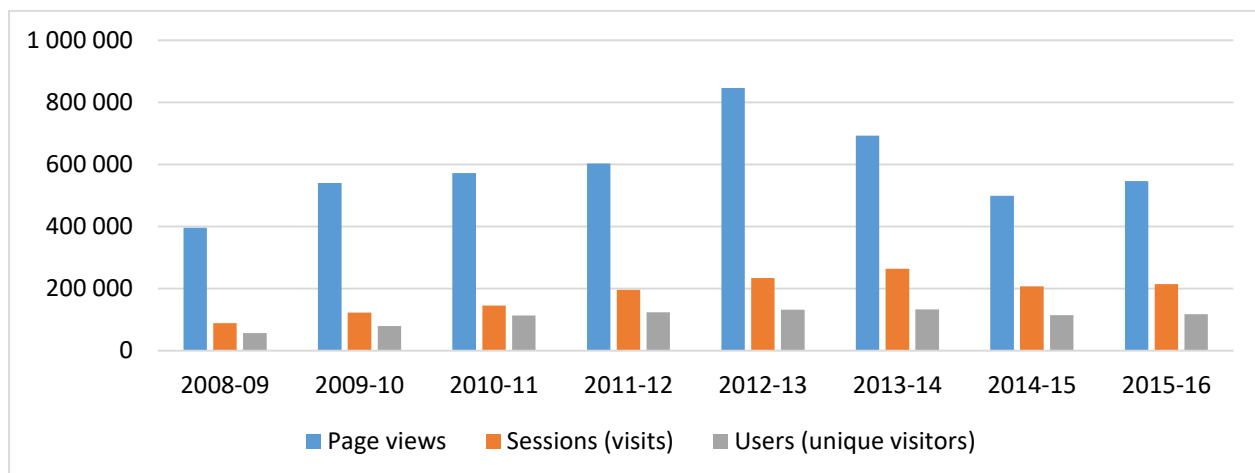
Figure 11: TV5QC audience ratings between 2011–12 and 2016–17



In terms of audience growth, the data show an increase from 187 to 318 million households reached by TV5MONDE and from 6.5 to 10 million in Canada between 2011 and 2016.

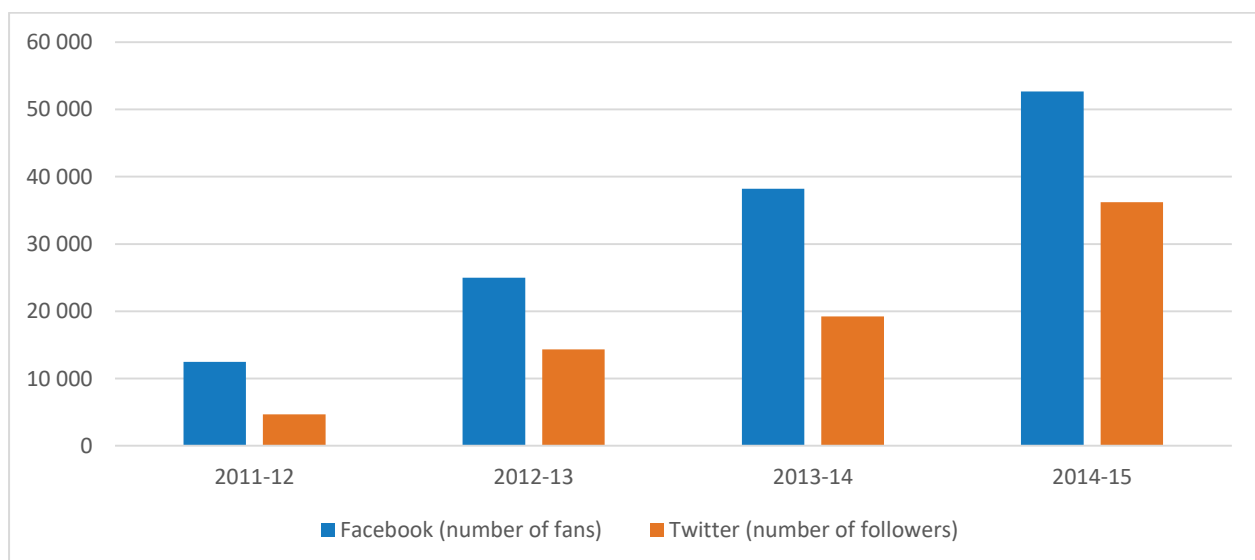
As regards positioning in the digital space, quantitative data show a rapid increase in traffic on the TV5QC and TV5MONDE digital platforms during the evaluation period. For example, TV5QC reported an increase in monthly visits on all of its digital platforms from 88,000 to 214,000 between 2008–09 and 2015–16 (see Figure 12 below).

Figure 12: Average monthly broadcast on TV5QC's digital platforms from 2008–09 to 2015–16



Visits to TV5QC's social network pages also increased between 2011–12 and 2014–15. The number of Facebook fans increased from 12,000 to 52,000 and Twitter followers increased from 4,700 to 36,000 over this period (see Figure 13 below).

Figure 13: Visits to TV5QC's social network pages from 2011–12 to 2014–15 (annual total)



The Program's quantitative data show an increase in the number of videos viewed on TV5MONDE's websites, which increased from 1 to 5 million between 2010–11 and 2015–16. Quantitative data also show an increasing number of downloads of the TV5MONDE app (132,000 to 799,000), as well as followers of its Twitter accounts (27,000 to 448,000) and Facebook (237,000 to 4,000,000) over the same period.

Intermediate outcome 2: Support for the creation, production and distribution of Canadian audiovisual products.

Key findings:

Program funding for TV5QC has made it possible to produce French-language Canadian programs that reflect the reality of Francophone communities across Canada. Moreover, a certain percentage has been produced or co-produced by independent producers from outside Montréal or the province of Quebec.

In the years covered by the evaluation, between 15% and 20% of TV5QC's content were independent French-Canadian productions. UNIS, of which 75% of the content must be of Canadian origin, has made a significant contribution to the broadcasting of Canadian productions from the country's various Francophone communities, thereby providing a cross-cultural perspective on Canadian Francophone culture across Canada, which is one of the Program's objectives.

According to the document review, the Program's financial contribution aims to encourage the production of French-language Canadian content to allow various communities a cross-cultural perspective of the Canadian Francophonie cultural and vitality.²⁷ This vision is shared by key respondents, who note that the TV5QC and UNIS channels play complementary roles in presenting the other regions of Canada and the international Francophonie to television viewers. According to some respondents, the commonalities between the two channels are the defence and promotion of living in French in Canada.

According to the literature and the stakeholders, the licence granted by the CRTC requires that TV5QC dedicate a minimum of 50% of Canadian content on both of its channels.²⁸ Furthermore, TV5QC must devote a minimum of 55% of the previous year's gross revenue to the acquisition of Canadian programs. Of that amount, the majority (75%) is earmarked for acquiring the rights to first-run original programming and 40% of the budget must support the production of programming that reflects the situation, achievements or aspirations of French linguistic minority or established communities in the regions. Furthermore, the majority of that 40% must be allocated to programs produced or coproduced by independent producers outside Quebec (60%).²⁹ The Program's administrative data show that more than half (51% in 2014–15 and 56% in 2015–16) of the original Canadian productions broadcast on UNIS TV come from outside Quebec.

The stakeholder and expert interviews also echoed the above points by affirming that the UNIS channel is an important source of support for Canadian production and creators.

According to one expert, CRTC requirements have led to a marked change in recent years. The number of productions originating in French-language communities outside Quebec broadcast by TV5QC and UNIS has increased since 2014. For some producers, the international broadcast of programs from Francophone communities outside Quebec has made it possible to share their reality with the whole world. However, in this expert's opinion, although much effort has been put into representing Canadian Francophone artists and culture, there needs to be even more productions outside Quebec and Canadian Francophone co-productions with TV5.

As was previously mentioned, production costs have increased, but the export budget has remained the same. This situation concerns a number of key respondents, who fear that it will lead to a decreased presence of quality Canadian programs on TV5MONDE's programming schedule.

27. Department of Canadian Heritage, PMERS, July 2016, p. 3-4 [available in French only].

28. It is an overall calculation, so 80% of the Canadian content can be on UNIS and 20% on TV5.

29. TV5QC, *Compte-rendu, Rencontre de concertation des gouvernements du Québec et Canada et TV5*, September 4, 2013, pp. 1–2.

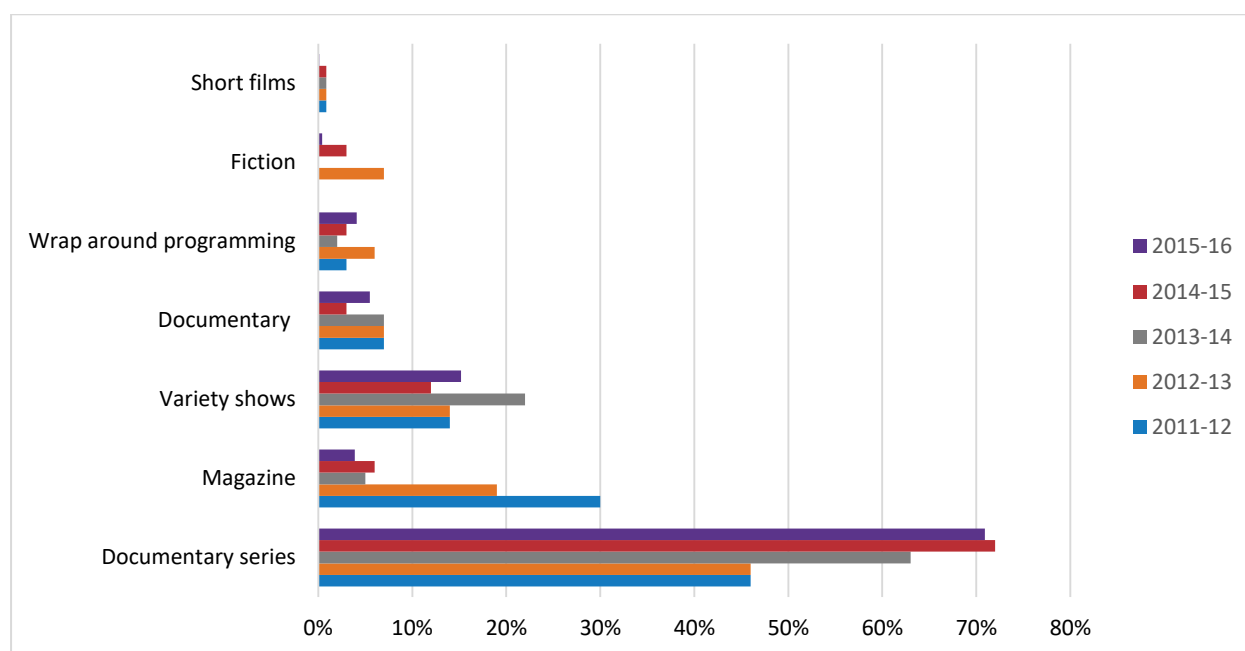
Intermediate outcome 3: Access for the Canadian public to a showcase of Francophone cultural diversity.

Key findings:

As shown previously, PCH's funding allows TV5 to provide Canadian audiences with access to a window on the cultural diversity of the Francophonie. Moreover, the TV5 content that is broadcast on TV5QC provides the Canadian public with access to international content via cable providers and its digital platform.

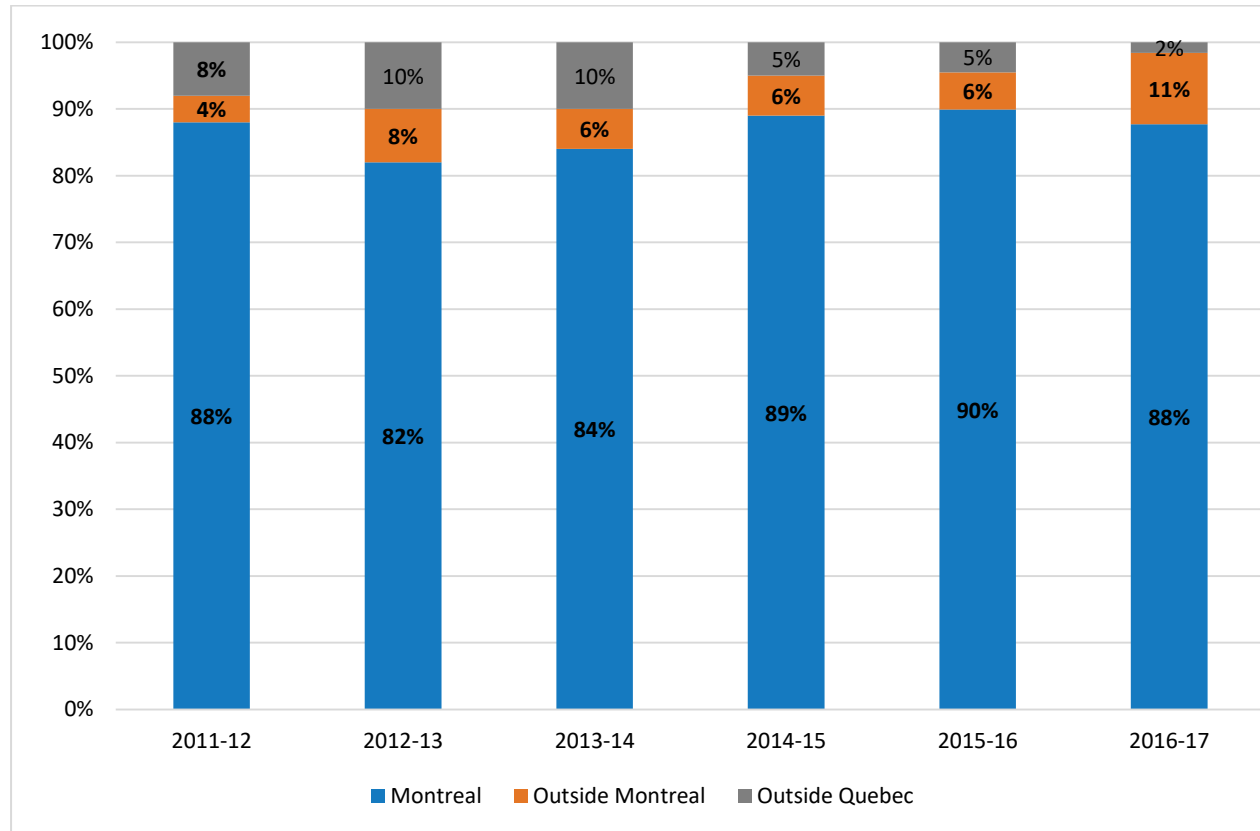
As noted above, the evaluation demonstrated that TV5QC provides French-language content across Canada via cable providers and its digital platform. Figure 5, presented previously, illustrates that Canadians can have access to content from France and other regions of the world. Figure 14 below shows that the majority of Canadian productions were documentary series, followed by magazines and variety shows.

Figure 14 : Categories of Canadian programs broadcast on TV5QC from 2011–12 to 2015–16



TV5 also provides Canadian audiences with access to programming that reflects the cultural diversity of the Francophonie within Canada³⁰. According to administrative data (see Figure 15), the majority (between 82% and 90%) of Canadian programs broadcast on TV5QC come from Montréal.

Figure 15: Origin of Canadian programs broadcast on TV5QC between 2011–12 and 2016-17



³⁰ TV5 is able to reach this goal because of the UNIS channel, whose content emphasizes the richness and diversity of Canadian Francophonie, while promoting the production of original and high-quality content outside of Montréal and Quebec.

4.2.3. Has the TV5 Program achieved its long-term outcomes?

Final outcome: Canada contributes to the visibility of the Canadian and international Francophonie and maintains its influence within the Francophonie.

Key findings:

The data presented in the previous sections demonstrate that Canada's investment in TV5 has made it possible to reach 318 million households across the world and 10 million in Canada, thus contributing to the presence of the Canadian and international Francophonie.

Funding from PCH's TV5 Program and participation in the governance of TV5 also makes it possible to maintain some influence within the Francophonie. Canada's influence was mainly seen in the following cases during the evaluation period: the cancelling of the automatic increase in the TV5MONDE budget and the reintegration of Indonesia into TV5. Canada's support for cultural industries was also cited by stakeholders as an example to follow.

As was demonstrated above, the TV5 Program makes Canadian Francophone programming accessible to 318 million households around the world and 10 million households in Canada. The interview results also indicate that the Program contributes to the presence of the Canadian Francophonie, even if it is difficult to accurately measure the scope in the absence of audience ratings abroad.

The document review and stakeholder interviews indicate that Canada's influence within TV5 comes from both its funding and its participation in the organization's decision-making bodies, including Canada's rotating chairmanship of the TV5 partnership. It should be noted that Canada will hold the TV5 chair in 2018 and 2019. Among the highlights, stakeholders mentioned that Canada played a key leadership role in reviewing the automatic increase in funding by partners for the TV5MONDE budget and played an instrumental role in reintegrating Indonesia into the partnership.

Furthermore, some stressed the importance of public services in Canada's cultural policy. While Europe is reconsidering its models of public service, these stakeholders consider Canada's leadership and its support for cultural industries to be an example to follow.

4.3. Efficiency: Demonstration of efficiency

Evaluation question 5: Do the current funding and mechanisms produce the outputs and achieve results?

Key findings:

The two operators achieve their results through different budget structures. While 90% of TV5MONDE's revenues are contributed by partner governments, TV5QC's revenues are largely derived from subscription fees and advertising revenues. On the other hand, the increase in the digital space presents challenges for the cable broadcasting business model.

With respect to the performance measurement framework for the evaluation period, the mechanisms in place, including strategic plans, financial statements and operators' annual reports, as well as the minutes of meetings of the parties involved, made it possible to monitor and report to a large extent on the progress made during the evaluation period, except for data on television content consumption outside of Canada.

According to the document review and quantitative data, to date the funding provided by Canadian Heritage has allowed TV5 to achieve most of the expected outcomes. Administrative data from the program show that the two operators achieve their results through different budget structures. While 90% of TV5MONDE's revenues come from the contribution of partner governments, TV5QC's revenues are largely derived from subscription fees and advertising revenues.

Figure 16: TV5MONDE's revenue sources, 2016

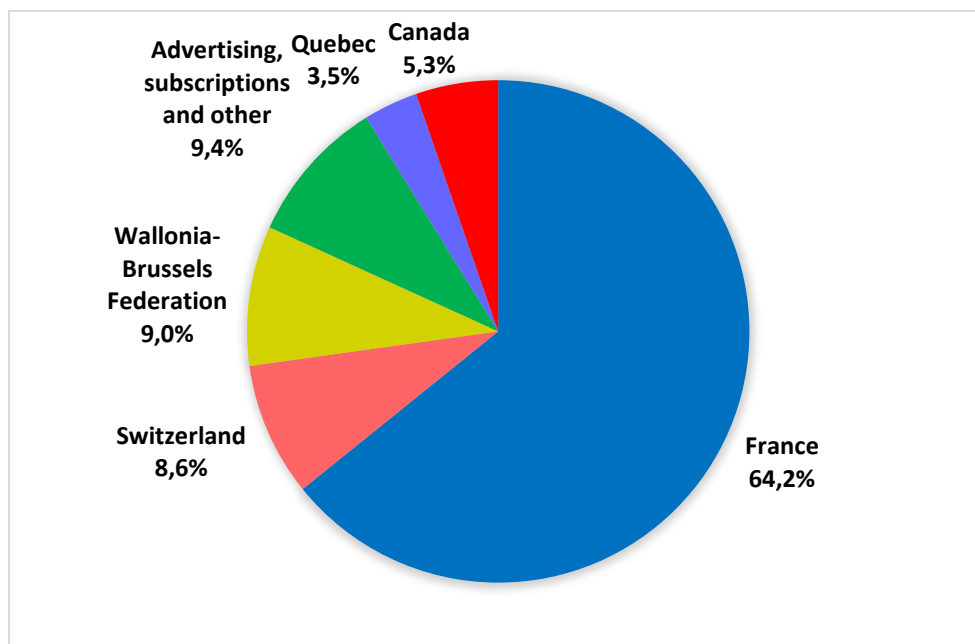
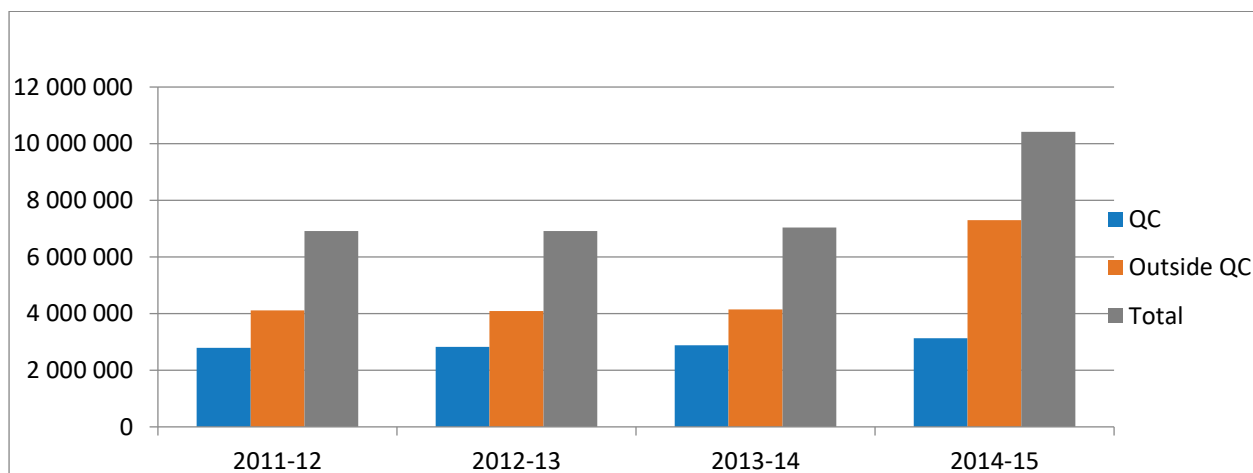


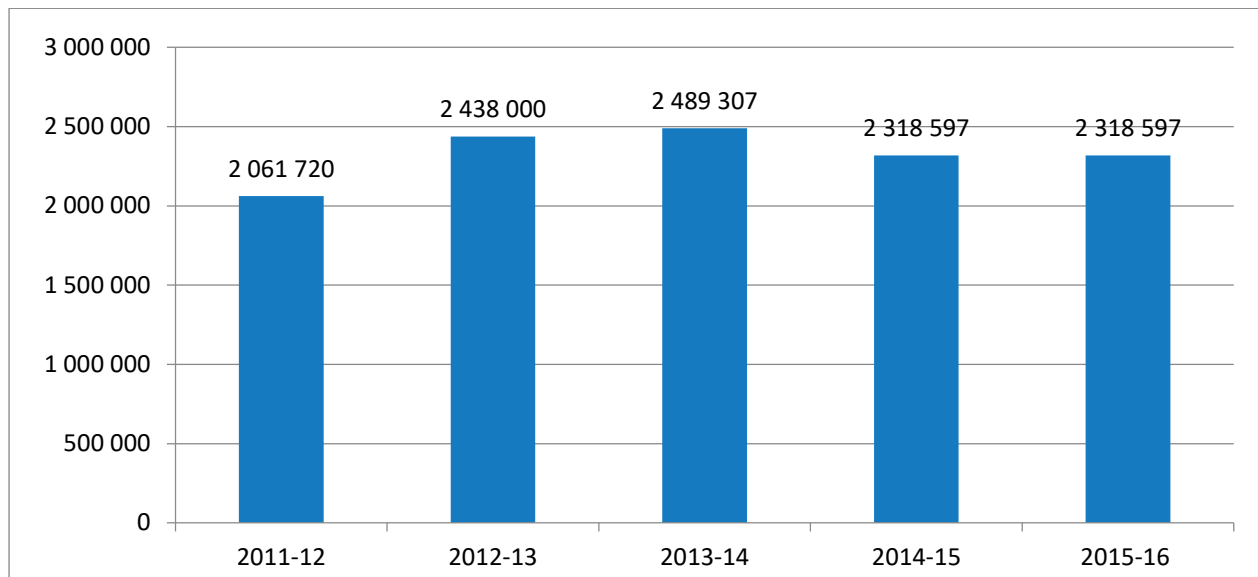
Figure 17 shows the change in the number of subscribers and Figure 18 the change in TV5QC's advertising revenues during the evaluation period.

Figure 17: Number of subscribers to TV5QC from 2011–12 to 2014–15³¹



³¹ Data were not available for 2015–16 and 2016–17.

Figure 18: Change in TV5QC's advertising revenues from 2011–12 to 2015–16 (in Canadian dollars)

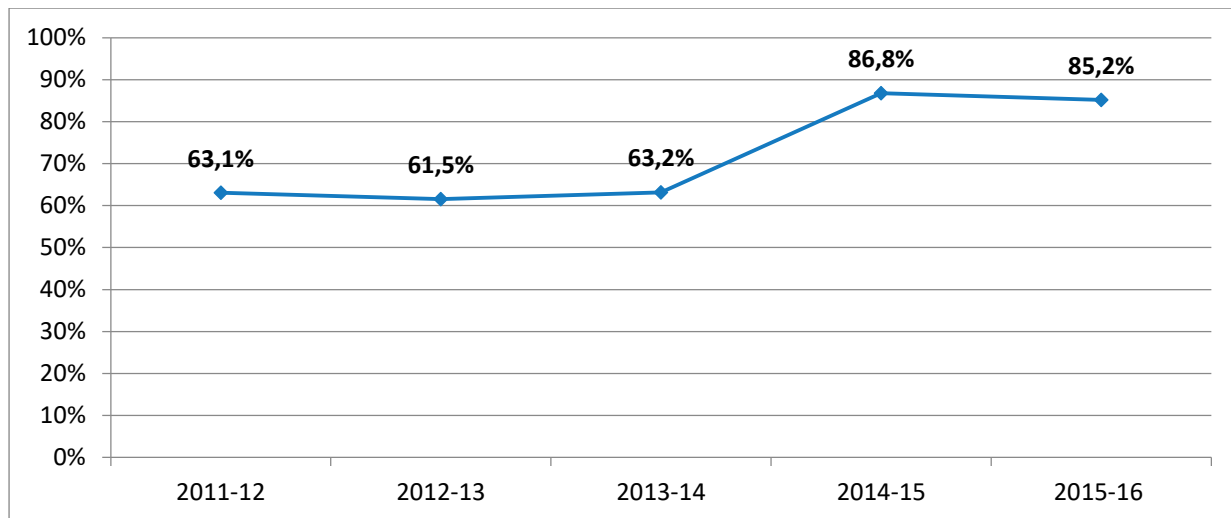


The CRTC order for the mandatory distribution of TV5 across Canada contributed to TV5QC's revenues. According to a study by the Centre d'études sur les médias at Laval University, French-language specialty services obtain 71% of their revenues from fee-for-carriage. However, according to the study, profitability is declining despite the increase in overall revenues. For example, in 2015, the share of profits from operating revenues was 12%, that is, down 9% from 2014, due to a decrease in the number of television broadcast subscriptions.³² Under these circumstances, TV5QC is doing fairly well. The CRTC order guarantees the channel distribution across all of Canada.³³ Thanks to the mandatory distribution order, subscriptions accounted for 87% of TV5QC revenues in 2014–15, which constitutes an increase over 2011–12 to 2013–14 (see Figure 19 below).

³². Centre d'études sur les Médias, "[La télévision](#)," Laval University, 2017, p. 5, cited by the Ministère de la Culture et des Communications [Department of Culture and Communications], "TV5" [Online], Government of Quebec, 2017, page consulted on January 30, 2018.

³³. CRTC, "[Broadcasting Regulatory Policy CRTC 2010-629](#)" [Online], 2010, page consulted on February 3, 2018.

Figure 19: Changes in TV5QC's subscription revenues as compared with its total funding from 2011–12 to 2015–16



The literature review nonetheless illustrates that the television industry is not immune to the challenges related to the digital shift in terms of impact on revenues. For example, the decrease in revenues from traditional channels resulted in restructuring and downsizing, which in turn led to the loss of several jobs, particularly at local stations in small and medium-sized markets.

The stakeholders also noted that the growth of the digital media space is likely to lead to decreased advertising revenues in the long term. That said, the literature contains examples of digital transition models where the tools specific to the online platforms (for example, customization, algorithms, mobile applications) are used to overcome the challenges met.

As for the mechanisms in place to ensure results, the document review, namely the Program's PMERS, demonstrates that several mechanisms have been put in place. Some of them are designed to obtain information on a continuous basis, whereas others measure results at the time of the evaluation. The mechanisms that are designed to continuously monitor results include the following:

- The TV5MONDE and TV5QC annual reports and the Program Committee that monitors changes in the channels' activities, the use of allocated funds, and the overall performance of the channels and Program.
- Meetings of the funding governments and the channels provide an opportunity to take stock of their activities and finances and present their strategic objectives, priorities and directions. For the partner governments, these meetings make it possible to approve annual budgets, approve the operators' strategic plans, establish their financial contributions, discuss short- and medium-term issues, and discuss the potential addition of new partner governments with a view to making a recommendation to the ministers.

- A strategic monitoring directory documenting the major issues that may have an impact on the future of the channels or Program has been implemented. The directory includes meeting minutes, discussions with the channels and key stakeholders, and newspaper articles related to issues in the audiovisual industry. The directory also makes it possible to identify major trends that are likely to affect the Francophonie and the broadcasting world in Canada and abroad.
- A mini database was also put into place that contains information on the performance of the channels (e.g., percentage of Canadian content on TV5MONDE's signals, number of households reached and limited Web statistics).

The evaluation team noted that the outcomes and indicators contained in the PMERS were numerous and sometimes repetitive, making accountability and the evaluation of the Program more burdensome. Although the TV5 Program's PMERS was replaced by a new performance framework, it would be timely to examine it to ensure that the expected outcomes and indicators are clear and concise.

4.4. Other evaluation questions

Evaluation question: Does the TV5 Program asserts its leadership among recipients with respect to gender-based analysis?

Key findings:

There were no indicators related to gender equality in the Program's logic model or performance measurement framework for the evaluation period. The Program therefore did not collect any data on gender equality issues. However, it did collect some quantitative data on the audiovisual preferences and viewing patterns of women and men.

As regards the indicator in the evaluation matrix (which does not measure leadership, but the preferences of men and women and the modes of content consumption), the following points were noted:

- To get informed, women tend to watch television, while men use the Internet.
- Men tend to watch sports and the news, while women are more likely to watch dramas, musical and cultural programs.

The evaluation did not collect any other conclusive data on gender equality.

Data from Statistics Canada reveal a difference in TV and digital platform consumption among men and women. In 2013, the General Social Survey, conducted by Statistics Canada, showed that as regards the use of media to follow news, men use the Internet more (62%) than do women (55%), whereas women

are proportionately more likely to watch television (77%, compared with 73% of men).³⁴ According to the CRTC's Let's Talk TV report (2014), Canadian women are more likely to prefer drama, music and TV programming that is reflective of Canadian culture, while men express a preference for sports programming.³⁵ According to the Program's quantitative data, men are indeed more likely to watch sports programs, whereas women watch more fiction series.

Evaluation question: Have been there any unexpected outcomes as a result of TV5's activities?

Key findings:

The TV5 Program contributed to the TV5MONDE initiatives being more successful than expected.

Based on the document review and interviews, the TV5 program has contributed to some TV5MONDE initiatives achieving success beyond expectations. For example, the Francophone digital library, which contains more than 500 free works of classic French literature (Victor Hugo, Balzac, Rimbaud, etc.), met with unexpected success in the United States. The launch and success of the Style and Tivi5 MONDE channels also met with more success than anticipated. Moreover, in September 2017, TV5MONDE received an award for the best French company in the United States by the French-American Chamber of Commerce in New York.

Evaluation question: To what extent has the TV5 program implemented the recommendation of the last evaluation?

Key findings:

The recommendation of the previous evaluation was to adopt a new performance measurement and risk strategy. However, the time spent on monitoring and on maintaining diplomatic activities was very limited owing to the Program's limited resources.

To ensure that the objectives and expected outcomes of the TV5 Program remain relevant in the ever-changing world of broadcasting, the previous evaluation recommended that the Program continue to document significant changes and issues likely to influence its effectiveness and efficiency by strengthening its risk management.

The document review confirmed that the Program implemented the previous evaluation's recommendation by putting in place a new performance measurement and risk strategy in July 2016. At the moment, the themes of TV5 – issues concerning broadcasting, new media and Francophone media, and the international Francophonie – were added to the environmental scan conducted regularly by the

34. Statistics Canada, "[The use of media to follow news and current affairs](#)" [Online], 2015, page consulted on January 15, 2018.

35. CRTC, "[Let's Talk TV: Quantitative Research Report](#)" [Online], 2014, page consulted January 16, 2018.

Program. Additionally, the Program implemented a database to facilitate strategic monitoring, as per the recommendation. It provides data on channel performance (e.g., Canadian content on the TV5MONDE signals, number of households reached, Web statistics). However, the document review also revealed that the monitoring, which was supposed to be ongoing, was only done sporadically. The database was last updated in 2015.

As a result of organizational changes in the Department in 2011, management of the TV5 Program was transferred to the Cultural Affairs Sector, and the number of FTE employees decreased from 3 to 1.5. The stakeholders therefore feel that the Program devotes less time to maintaining the diplomatic activities of the TV5 partnership, which offers many opportunities to develop long-term working relationships with the other funding governments and the Program's recipients so that Canada may fully exert its influence and play a leading role within the Francophonie.

This was also mentioned by some key respondents, who feel that the human resources allocated to the Program were insufficient to fully deliver on its mandate as regards the surveillance, analysis and documentation of the broadcasting industry in Canada and abroad. This would have enabled the Program to contribute to monitoring, make projections or follow the trends.

Evaluation question: To what extent is the governance optimal for achieving the outcomes anticipated?

Key findings:

As observed in TV5's program profile, there are several mechanisms in place to ensure governance and monitor progress toward the achievement of results. Nevertheless, it would be beneficial for the Program if there were a sharing of information with other PCH groups that collect and analyze data in the field of broadcasting and digital communication.

As demonstrated above, the TV5 Charter contains several mechanisms to ensure governance and monitoring of results, for both TV5MONDE and TV5QC. The document review demonstrates that TV5's governance bodies meet regularly to discuss policy issues. According to stakeholders, leadership changes at TV5MONDE and TV5QC were beneficial and made it possible to review policy issues at TV5 and to expand its programming offer. However, some feel that the Conference of Ministers should meet more frequently because of all the changes that are happening in the worlds of broadcasting and digital.

Among the key stakeholders interviewed by PCH, half of them (three out of six) questioned the placement of the Program within the Strategy Policy and Management of the Cultural Affairs Sector, with which they are not able to discuss ideas for improving the Program because the management groups are disparate. These key stakeholders believe that the Program would benefit from being under the responsibility of a different division, such as Broadcasting and Digital Communications or Strategic Policy and International Affairs, whose mandates are closer to that of the TV5 Program.

According to these same stakeholders, increased collaboration between the PCH teams who work in the areas directly involving TV5 is preferred in order to share trends, priorities, etc. The Program could thus benefit from the technical resources available in these divisions. PCH's Broadcasting and Digital Communications Branch provides advice on broadcasting and digital communications issues, formulates policies, proposes legislation and administers programs. Pursuant to its mandate, the Branch compiles and analyzes available data, makes projections and follows trends in the area of broadcasting and digital communication. For example, the Broadcasting and Digital Communications Branch has access to the audience ratings of specialty television, financial trends for specialty television, use of the website and digital platforms, and revenues and expenditures for specialty television.

The essence of this synergy can be found in the commonalities among the departmental responsibilities to the international Francophonie. The Strategic Policy and International Affairs Directorate ensures PCH's leadership in the Francophonie by bringing its expertise to the Department's priority areas, such as the promotion of the French language, cultural diversity, the arts and cultural industries, etc. This collaboration reinforces the alignment of the Department's priorities within TV5 and the other bodies of the international Francophonie.

5. Conclusions

This section presents the conclusions drawn from the evaluation's findings with respect to relevance, effectiveness, efficiency, and other issues addressed by the evaluation.

5.1. Relevance

Support of TV5 is in line with the PCH's strategic objectives, which is to promote Canadian Francophone culture in Canada and around the world and to support Canadian cultural production. TV5 is also a direct operator of the Summit of La Francophonie for exerting influence within the Francophonie and advancing Canadian priorities.

The digital shift is a major and inescapable challenge. PCH should continue to ensure that the Program responds to the digital shift. In that regard, the export budget has remained the same since 2009, while there has been an increase in production costs and the costs of releasing programming rights for broadcast. According to the stakeholders, this could result in a reduction in the airtime of Canadian Francophone productions on TV5MONDE's networks or in the airing of lower quality content.

5.2. Effectiveness

Canadian participation in TV5 (TV5MONDE and TV5QC) made it possible to achieve the expected outcomes, that is, to:

- increase the distribution of varied Francophone audiovisual content from the international and Canadian Francophonie and reach 318 million households in 200 countries in 8 geographical areas, including 10 million households across Canada;
- increase access to Francophone content on digital platforms;
- contribute to the production and distribution of Francophone content across Canada;
- have access to Francophone programming from Quebec and French-speaking Canada, Africa, and Europe, including France, Belgium and Switzerland;

The Program may not, however, be able to accurately measure the presence of Canadian productions around the world because detailed information on audience ratings is not available.

5.3. Efficiency

The evaluation found that the TV5 Program is efficient and the funding provided by the Government of Canada has largely allowed TV5 to achieve the expected results.

- The two operators achieve their results with different budget structures. While 90% of TV5MONDE's revenues come from the contribution of partner governments, TV5QC's revenues are largely derived from subscriptions fee and advertising revenues.

-
- The increase in the digital space presents challenges for the business model of cable broadcasters which could reduce TV5's profitability and, consequently, its ability to offer varied and quality programming.
 - Although TV5QC is profitable, changes in consumption habits associated with the shift to digital pose some challenges to TV5QC's cable television business model. These issues affect the entire industry and the PCH program continues to monitor them.
 - The Program could benefit from certain data collected by other PCH groups.

5.4. Other evaluation questions

The PMERS did not include a performance measurement tool for assessing Canada's leadership in the area of gender equality. However, in view of the federal policy on gender equality, the Program could collect and include some indicators in this regard.

The TV5 Program's various mechanisms made it possible to monitor to a large extent the progress toward the achievement of the expected outcomes. As was mentioned above several times, for reasons related to capacity and resources, TV5MONDE does not have quantitative data on consumption that would enable it to judge the impact of the funding on the presence of Canadian productions in the geographic areas where they are distributed, except for Quebec.

Although the Program has a new performance measurement framework, the expected immediate and intermediate outcomes and the performance measurement indicators should be reviewed to ensure they are clear and concise so as to facilitate monitoring and accountability.

6. Recommendations, Management Response and Action Plan

Recommendation 1
That the Senior Assistant Deputy Minister of Cultural Affairs determine the extent to which the budget for the release of Canadian programming rights to TV5MONDE follows the trend in market rates in order to continue to promote the visibility of quality Canadian Francophone programming in the world.
Management response
<p>The TV5 Program agrees with this recommendation. As specified below, TV5 Québec Canada has made the same finding and has already analyzed its rates to ensure that the cost of acquiring Canadian programs for broadcast on TV5MONDE's various signals and platforms is competitive with market rates.</p> <p>In September 2017, TV5 Québec Canada informed the funding governments of its intention to increase its rate schedule for the release of rights to Canadian programs for broadcast on TV5MONDE with a view to joining the market and being able to compete with other broadcasters. This increase was confirmed by TV5 Québec Canada in October 2017 and will be implemented according to a graduated schedule determined by TV5 Québec Canada based on trends in market rates. Because the trends in market rates are unpredictable, the schedule cannot be set but rather adapted to the industry's needs.</p> <p>Moreover, the TV5 Program will pursue its responsibilities as they relate to this budget, mainly through its annual participation in the Program Committee meeting, the review of monthly broadcast reports and statistics provided by TV5 Québec Canada, and the management of the contribution agreement that specifically addresses the release of rights to Canadian programs for broadcast on TV5MONDE.</p>

Table 2: Recommendation 1 – Action Plan for Canadian Heritage

Action	Deliverables	Timeline	Responsible party
1.1 Gather information related to the distribution, presence and costs of Canadian programs on TV5MONDE and prepare a summary of the observations and conclusions in order to determine the extent	Collection of data from TV5 Québec Canada associated with compliance with	October 2019	Strategic Policy and Management Directorate, Cultural Affairs Sector

Action	Deliverables	Timeline	Responsible party
to which the budget for the release of Canadian programming rights at TV5MONDE follows the trend in market rates and continues to promote the influence of quality Canadian Francophone programming in the world.	the trend in market rates in the budget for the release of Canadian programming rights at TV5MONDE.		
	Summary of observations and conclusions on the trend in market rates.	February 2020	Strategic Policy and Management Directorate, Cultural Affairs Sector
	Briefing note to present the summary of observations and conclusions to senior officials to inform them of the trends in market rates.	May 2020	Strategic Policy and Management Directorate, Cultural Affairs Sector
	Annual monitoring reports listing the quantity and type of Canadian programs proposed to and retained by TV5MONDE.	May 2020	Strategic Policy and Management Directorate, Cultural Affairs Sector
Full implementation date: May 2020			

Recommendation 2

That the Senior Assistant Deputy Minister of Cultural Affairs take the necessary steps to strengthen ties between the TV5 Program and other PCH groups (e.g., Broadcasting and Digital Communications, Strategic Policy and International Affairs) in order to share knowledge and data on trends, including technology, to ensure that TV5's performance is properly monitored.

Management response

The TV5 Program agrees with this recommendation. The organizational structure of the TV5 Program over the course of the evaluation period was a major determining factor in the TV5 Program's capacity to establish and maintain sustained and periodic collaboration with other PCH groups.

A new organizational structure has since been put in place to increase the TV5 Program unit's ability to manage the Program and, as a result, enhance the working relationships between other PCH groups. This has made it possible to enhance the working relationship with PCH's Strategic Policy and International Affairs, in particular through ongoing consultations and the TV5 Program's contributions to its complementary responsibilities and priorities with respect to the international Francophonie.

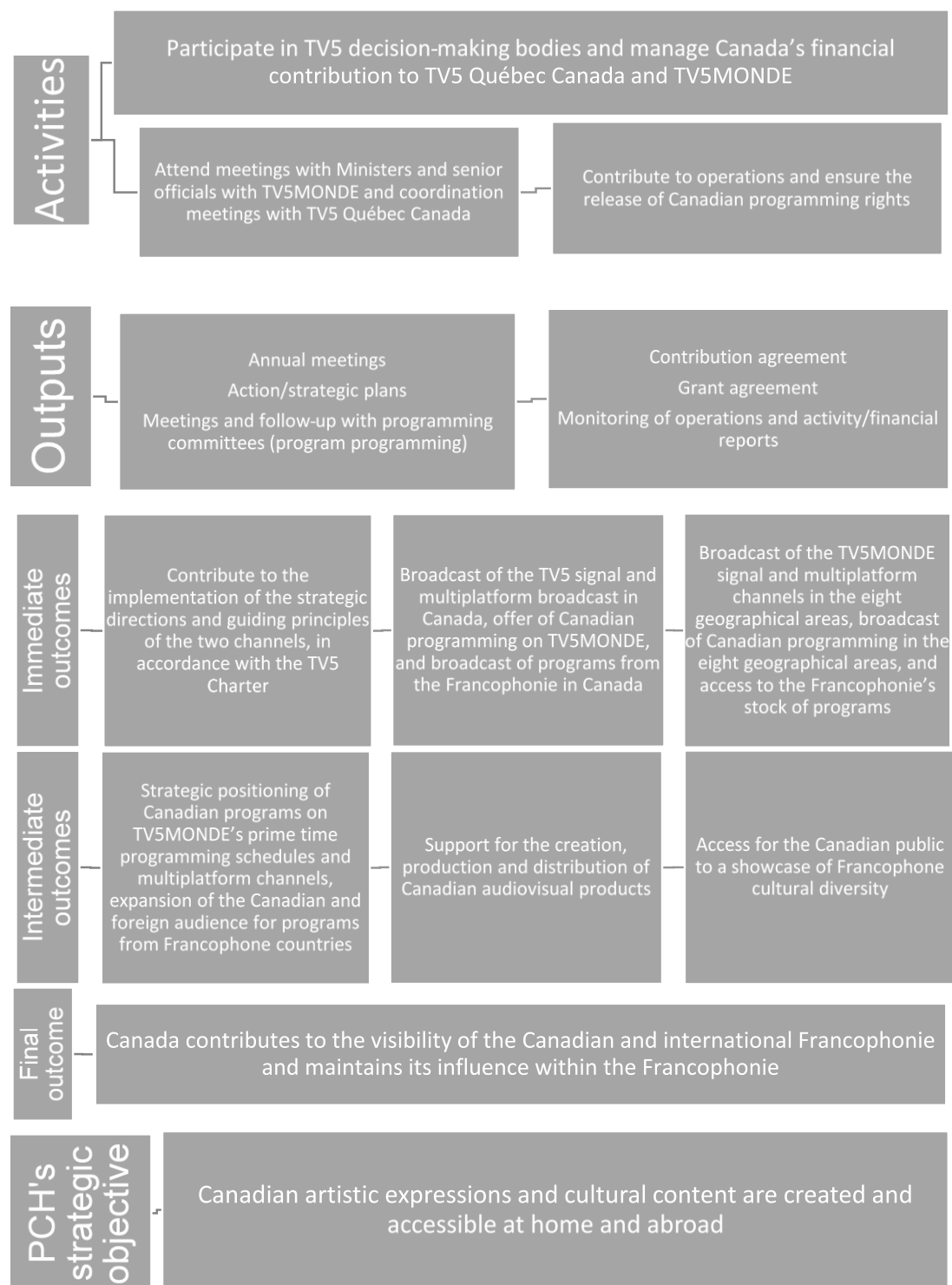
The TV5 Program is committed to continuing its efforts and actions with PCH's Strategic Policy and International Affairs and to undertaking the necessary measures to establish ties between the TV5 Program and the Broadcasting and Digital Communications Branch.

Table 3: Recommendation 2 – Action Plan for Canadian Heritage

Action	Deliverables	Timeline	Responsible party
2.1 Implement the necessary mechanisms to improve and establish strategic ties between the TV5 Program and other PCH groups (e.g., Strategic Policy and International Affairs, Broadcasting and Digital Communications)	Document listing objectives aimed at improving and establishing strategic ties between the TV5 Program and other PCH groups.	April 2020	Strategic Policy and Management Directorate, Cultural Affairs Sector
	Document highlighting the potential	August 2020	Strategic Policy and Management

Action	Deliverables	Timeline	Responsible party
	mechanisms for maximizing the working relationships with other PCH groups.		Directorate, Cultural Affairs Sector
	Presentation of proposed objectives and potential mechanisms for consultation and consideration with other PCH groups.	October 2020	Strategic Policy and Management Directorate, Cultural Affairs Sector
	Presentation of mechanisms for collaboration selected together with other PCH groups.	January 2021	Strategic Policy and Management Directorate, Cultural Affairs Sector
	Mechanisms for collaboration taken into account in the TV5 Program Director's performance agreement.	April 2021	Strategic Policy and Management Directorate, Cultural Affairs Sector
Full implementation date: April 2021			

Appendix A: TV5 Program Logic Model



Appendix B: List of Evaluation Questions

Relevance

1. Is federal participation in TV5 still relevant in the context of the current Francophone audiovisual space?
 - Is there a demonstrated need for the federal government's ongoing participation in TV5?
 - What makes TV5 distinct in the Canadian French-language television market?
2. To what extent are the Program's objectives compatible with the federal government's priorities and the Department's strategic objectives?
 - To what extent is the TV5 Program in line with the Department of Canadian Heritage's strategic objectives and the federal government's priorities?
3. To what extent are the Program's objectives aligned with the role and responsibilities of the federal government?

Performance

- 4.1 Is the TV5 Program achieving the immediate outcomes anticipated?
 - To what extent are the strategic directions and guiding principles of the two operators implemented as provided for in the TV5 Charter?
 - To what extent does federal participation in TV5 promote the broadcast of the TV5 signal and multiplatform broadcast in Canada and the broadcast of the TV5MONDE signal and multiplatform broadcast in the eight geographical areas?
 - To what extent does the Program contribute to the presence and broadcast of Canadian programming on TV5MONDE?
 - To what extent does federal participation provide access to the Francophonie's stock of programs for broadcast in Canada?
- 4.2 Is the TV5 Program achieving the intermediate outcomes anticipated?
 - To what extent does federal participation in TV5 contribute to the positioning of Canadian programs during prime time on TV5MONDE's programming schedules?
 - To what extent does federal participation in TV5 contribute to the positioning of Canadian content on other broadcast platforms?
 - To what extent does the Program contribute to the expansion of the audience in Canada and abroad for programs from the Francophonie?
 - To what extent does the Canadian public have access to a showcase of Francophone cultural diversity?

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- To what extent does the Program contribute to the creation and production of Canadian audiovisual products?
 - What is TV5's contribution to the visibility of the Canadian Francophonie around the world?
 - What is TV5's contribution to the visibility of the international Francophonie in Canada?

4.3. Is the TV5 Program achieving the long-term outcomes anticipated?

- To what extent do the Program's activities contribute to maintaining Canada's influence within the Francophonie?

Efficiency

5. Demonstration of efficiency

- Does TV5's current level of funding produce the outputs required to achieve results?
- To what extent are the monitoring mechanisms put in place effective in helping the Program achieve its objectives?

Other questions

- Does the TV5 Program assert its leadership among recipients with respect to gender-based analysis?
- What are the commonalities between TV5 and UNIS? What impact does UNIS have on the TV5 Program?
- What is the impact of the CRTC's mandatory distribution order on the capacity of TV5 Québec Canada?
- Have there been any unexpected outcomes as a result of TV5's activities?
- To what extent is governance optimal for achieving the outcomes anticipated?
- To what extent has TV5 implemented the recommendation of the last evaluation?

Appendix C: Graphs Supporting the Findings

Figure 20: Canadian content broadcast on TV5MONDE per region at night (midnight to 6:00 a.m.) from 2011 to 2016

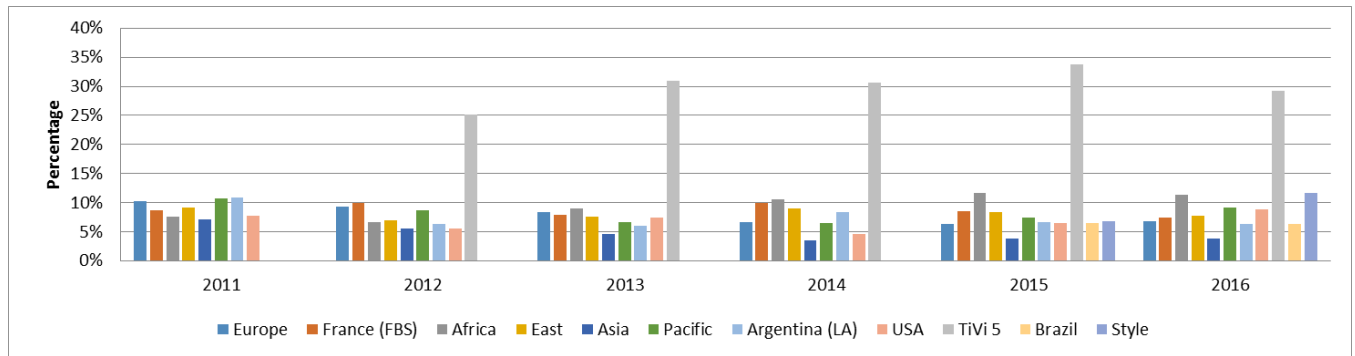


Figure 21: Canadian content broadcast on TV5MONDE per region in the morning (6:00 a.m. to noon) from 2011 to 2016

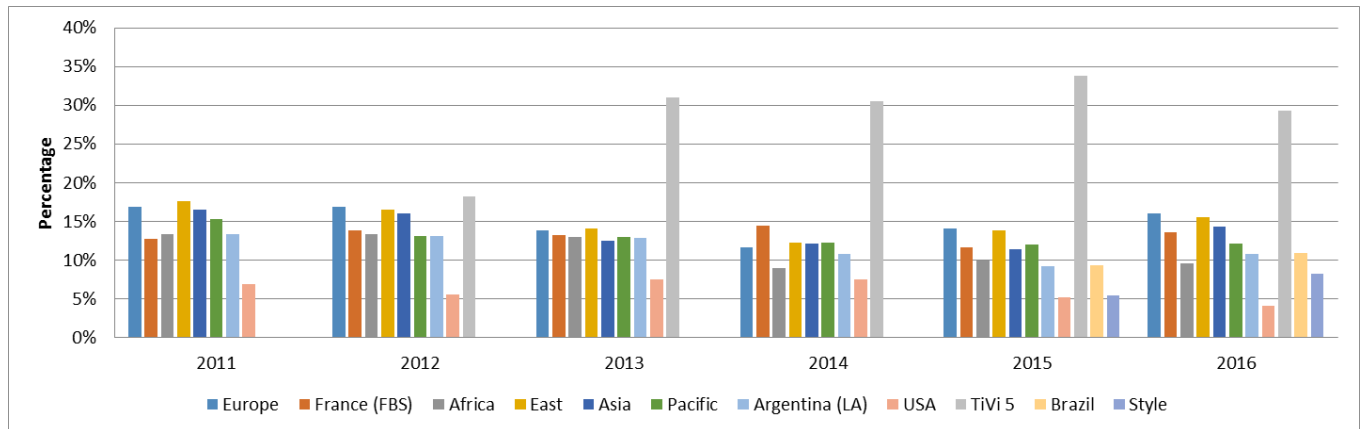
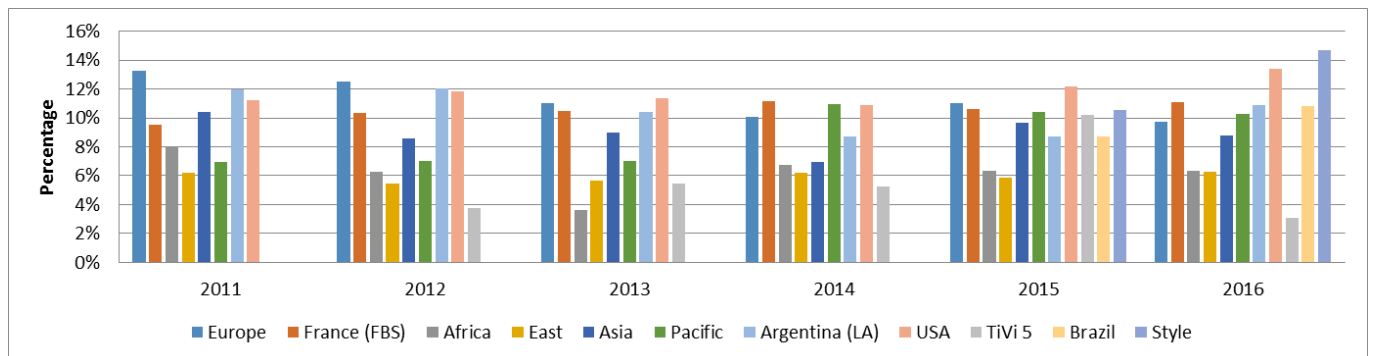


Figure 22: Canadian content broadcast on TV5MONDE per region in the afternoon (noon to 6:00 p.m.) from 2011 to 2016



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Appendix E: TV5 Program Management and Governance

The TV5 Program manages the funding PCH provides to TV5. In addition to the financial support to both recipients TV5MONDE and TV5QC, the Program manages the diplomatic aspect of the Program by maintaining close ties with the partner governments and other key stakeholders (public television channels and Global Affairs Canada). As a result of changes at PCH, management of the TV5 Program was transferred from Global Affairs Canada in 2011 to the Cultural Affairs Sector, more specifically the Strategic Policy and Management Directorate.

The TV5 Charter: The Charter is a political document, approved by the ministers of the funding governments, that sets out the main parameters for TV5's operations and its overall public service mission. The TV5 Charter establishes the partnership structure as well as the parameters that define the operators' activities and the expectations of the funding governments, including the Government of Canada.

Conference of the Ministers Responsible for TV5: The Conference of Ministers Responsible for TV5 determines the general directions of the TV5 partnership. The person designated as Minister of Canadian Heritage represents the Government of Canada. The Conference is held, as a rule, every two years, in step with the strategic plan, but the last meeting was the 22nd conference of ministers responsible for TV5 in December 2011 in Paris. When the conference of ministers is unable to be held, it delegates its role to a meeting of the senior officials. These meetings serve to:

- define TV5's general directions;
- define the geographic development priorities;
- endorse the strategic plan;
- establish the level of funding of the funding governments; and
- rule on the entry of new governments.

At the Conference, decisions are arrived at by consensus following discussions.

The conference of ministers responsible for TV5 is chaired in turn by each of the funding governments for a two-year term. PCH's TV5 Program assumes chairmanship of the work of TV5 on behalf of the Government of Canada every 10 years, the last time being in 2008 and 2009. Canada will chair the Conference of Ministers again in 2018 and 2019.

Annual meeting of the senior officials responsible for TV5: The preparation, monitoring and delegation of the role of the conference of ministers is carried out by the meeting of the senior officials representing the funding governments responsible for TV5. They meet once a year and as needed for specific issues. The person designated as the Senior Assistant Deputy Minister of PCH's Cultural Affairs Sector represents the Government of Canada.

The operators: TV5MONDE and TV5 Québec Canada: The TV5 television network is managed by two operators, which also have their own governance structures. Both operators are legally liable and have ultimate control over their respective organizations and programming. The operators participate in the work of the conference of ministers and the annual meeting of senior officials.

TV5MONDE

TV5MONDE is a private corporation incorporated under French commercial law that is based in Paris, France, and present in more than 200 countries and territories. The group TV5MONDE is broadcast in eight geographical areas:

- France/Belgium/Switzerland;
- Europe;
- Africa;
- Maghreb-East;
- Asia;
- Pacific;
- Latin America and the Caribbean (Brazil); and
- United States.

TV5MONDE also operates special-interest channels, such as Style HD, distributed on signals in Asia, Maghreb-East and the Pacific, and the children's channel Tivi5Monde in the United States and Africa.

TV5MONDE's fiscal year corresponds to the calendar year. TV5MONDE receives funding, in euros, from the five funding governments based on a nine-part formula: 6/9 France, 1/9 Wallonia-Brussels Federation, 1/9 Switzerland, 1/9 Canada (60%) and Quebec (40%) jointly. Funding by partner governments represents about 90% of TV5MONDE's total budget. TV5MONDE's board of directors consists of 12 directors and 4 observers.

TV5 Québec Canada

TV5QC is a private corporation under the *Canada Not-for-profit Corporations Act* with headquarters in Montréal and a presence across Canada. Its business model relies on it operating the broadcasting licence, renewable every five years, for the TV5 and UNIS signals in Canada, which has a mandatory distribution order that generates revenues through subscription fees.

TV5QC's fiscal year covers the period from September 1 to August 31. Public funding of TV5QC accounts for about 5% of its total budget, of which no government monies are dedicated to UNIS. The creation of UNIS is an initiative by the organization, not the TV5 partnership, intended to strengthen its business model. TV5QC's board of directors consists of 11 directors and 1 observer.

Annual meeting between TV5QC and the governments of Quebec and Canada: This annual meeting gives TV5QC the opportunity to present its annual results to the representatives of the funding governments of Quebec and Canada. Representatives of TV5, Canadian Heritage, the Ministère de la Culture et des Communications [Department of Culture and Communications] and the Ministère des Relations internationales et de la Francophonie [Department of International Relations and La Francophonie] of Quebec participate.

Canadian Programs Committee: The operator TV5QC manages for the governments of Quebec and Canada the budget for the release of Canadian programming rights for broadcast on TV5MONDE. The committee, which consists of TV5QC, Radio-Canada and Télé-Québec, is responsible for choosing the Canadian programs.

Accountability: Under the requirements of the funding governments, the operators submit annual reports on their activities (number of households reached, percentage of Canadian and international programs broadcast, share of market, Web traffic, etc.) and their financial situation.