ISO/TC 36 Business Plan
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BUSINESS PLAN
ISO/TC 36
Cinematography

EXECUTIVE SUMMARY

ISO/TC 36 Cinematography has the following scope:

Standardization of definitions, dimensions, methods of measurement and test, and performance characteristics relating to materials and apparatus used in silent and sound motion picture photography; in sound recording and reproduction related thereto; in the installation and characteristics of projection and sound reproduction equipment; in laboratory work; and in standards relating to sound and picture films used in television.

The key areas of the industries served include the manufacture of motion-picture film stock, the production, post-production and laboratory work for entertainment feature motion-picture films and the distribution and cinema theatrical exhibitions, around the world.

International Standards permit the international exchange of the related products and services.
1 INTRODUCTION

1.1 ISO technical committees and business planning

The extension of formal business planning to ISO Technical Committees (ISO/TCs) is an important measure which forms part of a major review of business. The aim is to align the ISO work programme with expressed business environment needs and trends and to allow ISO/TCs to prioritize among different projects, to identify the benefits expected from the availability of International Standards, and to ensure adequate resources for projects throughout their development.

1.2 International standardization and the role of ISO

The foremost aim of international standardization is to facilitate the exchange of goods and services through the elimination of technical barriers to trade.

Three bodies are responsible for the planning, development and adoption of International Standards: ISO (International Organization for Standardization) is responsible for all sectors excluding Electrotechnical, which is the responsibility of IEC (International Electrotechnical Committee), and most of the Telecommunications Technologies, which are largely the responsibility of ITU (International Telecommunication Union).

ISO is a legal association, the members of which are the National Standards Bodies (NSBs) of some 140 countries (organizations representing social and economic interests at the international level), supported by a Central Secretariat based in Geneva, Switzerland.

The principal deliverable of ISO is the International Standard.

An International Standard embodies the essential principles of global openness and transparency, consensus and technical coherence. These are safeguarded through its development in an ISO Technical Committee (ISO/TC), representative of all interested parties, supported by a public comment phase (the ISO Technical Enquiry). ISO and its Technical Committees are also able to offer the ISO Technical Specification (ISO/TS), the ISO Public Available Specification (ISO/PAS) and the ISO Technical Report (ISO/TR) as solutions to market needs. These ISO products represent lower levels of consensus and have therefore not the same status as an International Standard.

ISO offers also the International Workshop Agreement (IWA) as a deliverable which aims to bridge the gap between the activities of consortia and the formal process of standardization represented by ISO and its national members. An important distinction is that the IWA is developed by ISO workshops and fora, comprising only participants with direct interest, and so it is not accorded the status of an International Standard.

2 BUSINESS ENVIRONMENT OF THE ISO/TC

2.1 Description of the Business Environment

The following political, economic, technical, regulatory, legal and social dynamics describe the business environment of the industry sector, products, materials, disciplines or practices related to the scope of this ISO/TC, and they may significantly influence how the relevant standards development processes are conducted and the content of the resulting standards:
Recent expected technological changes and major innovations related to the industry sector, products or materials addressed by the scope of the ISO committee concern the development of Digital Cinema, the exhibition of feature "films" using electronic projection.

The industry includes the following major participants: manufacturers of raw film stock, laboratories which process the negative and print films, producers of feature films, post-production companies, distributors of the films, the exhibitors of the films in cinema theatres around the world, and finally, the movie-going public.

### 2.2 Quantitative Indicators of the Business Environment

The following list of quantitative indicators describes the business environment in order to provide adequate information to support actions of the ISO/TC:

Sales are generally measured in terms of box office receipts. Worldwide box office receipts were:

(source: Motion Picture Association)

<table>
<thead>
<tr>
<th>Year</th>
<th>Receipts</th>
</tr>
</thead>
<tbody>
<tr>
<td>2003</td>
<td>$20.34 billion USD</td>
</tr>
<tr>
<td>2002</td>
<td>$19.80 billion USD</td>
</tr>
<tr>
<td>2001</td>
<td>$17.00 billion USD</td>
</tr>
</tbody>
</table>

#### Region 2003 2002 2001

<table>
<thead>
<tr>
<th>Region</th>
<th>2003</th>
<th>2002</th>
<th>2001</th>
</tr>
</thead>
<tbody>
<tr>
<td>United States</td>
<td>$9.49 (all billions USD)</td>
<td>$9.52</td>
<td>$8.41</td>
</tr>
<tr>
<td>Asia Pacific</td>
<td>$3.79</td>
<td>$3.79</td>
<td>$3.14</td>
</tr>
<tr>
<td>Europe, Middle East, Africa</td>
<td>$5.58</td>
<td>$4.95</td>
<td>$4.09</td>
</tr>
<tr>
<td>Latin America</td>
<td>$0.80</td>
<td>$0.90</td>
<td>$0.52</td>
</tr>
<tr>
<td>Canada</td>
<td>$0.69</td>
<td>$0.60</td>
<td>$0.52</td>
</tr>
</tbody>
</table>

Worldwide employment is difficult to track. The Bureau of Labor Statistics of the US Department of Labor states that there were about 360,000 wage and salary jobs in the motion-picture and video industries in 2002 in the US, and that employment in the motion picture and video industries is projected to grow 31 percent between 2002 and 2012, roughly double the 16 percent growth projected for all industries combined. Job growth will result from the explosion of programming needed to fill an increasing number of cable and satellite television channels, both in the United States and abroad. Also, more films will be needed to meet in-home demand for videos, DVDs, and films over the Internet. Responding to an increasingly fragmented audience will create many opportunities to develop films. The international market for U.S.-made films is expected to continue growing as more countries and foreign individuals acquire the ability to view US films. As the industry registers employment growth, many more jobs will arise through people leaving the industry, mainly for more stable employment.

The major film stock suppliers are located in North America, Europe and Asia.

The major producers and distributors of feature films are located in North America, Europe and Asia.

Exhibition of feature films takes place world-wide. The Motion Picture Association reports in 2003, international (non-North America) box office estimates were:

<table>
<thead>
<tr>
<th>Rank</th>
<th>Country</th>
<th>Box Office (USD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>United Kingdom</td>
<td>$1,443,820,436</td>
</tr>
<tr>
<td>2</td>
<td>France</td>
<td>$1,233,640,995</td>
</tr>
<tr>
<td>3</td>
<td>Japan</td>
<td>$1,021,866,290</td>
</tr>
</tbody>
</table>
3 BENEFITS EXPECTED FROM THE WORK OF THE ISO/TC

Standards developed by the committee led to and are expected to lead to cost savings through implementation of them through common dimensions and parameters of the products. The same motion-picture projector may be used in Canada and the Russian Federation.

The standards have removed and are expected to remove technical barriers to trade and enable open markets in various regions of the world as feature films produced in any one nation can be distributed and exhibited around the world.

Cinematography standards in general do not address social, safety, health or environmental concerns.

Standards are cited and are expected to be cited as normative references in other International Standards.

4 REPRESENTATION AND PARTICIPATION IN THE ISO/TC

4.1 Countries/ISO members bodies that are P and O members of the ISO committee

4.2 Analysis of the participation

Worldwide cinematography market forces are well represented in the technical committee through both P-members and O-members. This includes film stock manufacture, feature film production and distribution as well as final exhibition.

The types of international organizations in liaison with the ISO committee include ISO, IEC and ISO/IEC committees.
5 OBJECTIVES OF THE ISO/TC AND STRATEGIES FOR THEIR ACHIEVEMENT

5.1 Defined objectives of the ISO/TC

The TC will continue to maintain existing International Standards and develop new International Standards in the area of cinematography. Expected new items of work include the area of Digital Cinema, the projection of feature film material using electronic projection techniques.

5.2 Identified strategies to achieve the ISO/TC’s defined objectives

The strategies are to maintain and develop International Standards, which are both relevant and responsive to the real world. Work will be conducted through the five working groups.

ISO committee work will be conducted by correspondence, physical meetings, e-mail and Internet.

Use of available national, regional or other standards for Digital Cinema will be used as source documents on which to base International Standards.

Necessary co-operation and liaisons with other ISO committees and external standards developing organizations will continue to be used.

The structure of the ISO committee with the TC and five WGs continues to serve the needs of the committee.

6 FACTORS AFFECTING COMPLETION AND IMPLEMENTATION OF THE ISO/TC WORK PROGRAMME

ISO committee WG convenor positions are vacant for WG 1 and WG 3. The Secretariat is fulfilling these duties in the interim.

7 STRUCTURE, CURRENT PROJECTS AND PUBLICATIONS OF THE ISO/TC

This section gives an overview of the ISO/TC’s structure, scopes of the ISO/TCs and any existing subcommittees and information on existing and planned standardization projects, publication of the ISO/TC and its subcommittees.

7.1 Structure of the ISO committee

7.2 Current projects of the ISO technical committee and its subcommittees

7.3 Publications of the ISO technical committee and its subcommittees

Reference information

Glossary of terms and abbreviations used in ISO/TC Business Plans

General information on the principles of ISO’s technical work