
The value of taping of television programs for educational purposes in Canada

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SUMMARY

- 1 This report presents a model to value the transactional and comprehensive tariffs of the Education Rights Collective of Canada (ERCC) for the taping of television programs by educational institutions.
- 2 The value of the transactional tariff is established on the basis of the same proxy used by ERCC: the market for the physical distribution of pre-recorded programs to educational institutions (Exhibit ERCC-6, paragraph 12). However, the ERCC calculations are adjusted in three ways: the first adjustment reflects the real size of the market; the second adjustment restricts revenues to the physical distribution of pre-recorded programs; and the third adjustment reflects the copyright royalty portion of these revenues.
- 3 Ultimately, the transactional tariff is established at \$0.51 per minute.
- 4 The value of the comprehensive tariff is determined based on a market proxy as well. I propose that the sum of all expenditures made by the education system on purchases of pre-recorded programs represents the value that the education system attaches to television programs as a teaching tool. It is a market-established value for all pre-recorded programs as aids to teaching. The comprehensive tariff is calculated on that basis.
- 5 Ultimately, the comprehensive tariff is established at \$0.37 per FTE.

INTRODUCTION

- 6 My qualifications are summarized in the attached curriculum vitae. I am the president of Circum Network Inc., a social research firm in

operation since 1996. I hold graduate degrees in political science and public administration as well as the titles of "administrateur agréé" (Adm.A.) and certified management consultant (CMC). My training and most of my work involve quantitative and statistical analysis of data. I have presented reports to the Copyright Board Canada in four occasions (dealing with the broadcasting of music by private radio stations, private copying (twice) and the use of music by pay audio channels) and I have testified in each case.

PURPOSE OF THIS DOCUMENT

- 7 Initially, the Education Coalition had asked me to conduct research towards the establishment of the value of a single use of a single copy of a television program. The assignment was planned in the context of the original ERCC tariff structure which featured a transactional tariff based, among other factors, on the extent of use.
- 8 The extensive revision of the tariff proposal by ERCC, and the evidence contained in the ERCC case, made it necessary to considerably revise my valuation approach. First, ERCC eliminated payment for performances from the structure of its transactional tariff. Much of my valuation research focussed on the quantitative measurement of the repeated use of copies. Second, ERCC accepted the market for the physical distribution of pre-recorded programs as the proxy for the transactional tariff, a topic which was prominent in my study and which no longer requires justification. The short time available to file the Education Coalition's evidence following its learning of the changes in the ERCC tariff structure did not allow me to collect as much empirical evidence as I would have liked on the new aspects of the proposed ERCC tariffs, but the facts presented in this report are solid nonetheless.
- 9 The purpose of my research was revised. My report provides the Copyright Board Canada with a valuation model for the transactional tariff as well as for the comprehensive tariff associated with the taping of television programs for educational purposes.
- 10 The taping of radio programs is excluded from the scope of this study.

MARKET PROXIES

- 11 The habitual approach to the valuation of a tariff such as the one under consideration is to find a comparable situation where a willing seller and a willing buyer are both in a market situation and establish

a price which reflects the preferences of both parties and allows for the economic exchange to take place.

- 12 A market situation can be defined as one where there are several sellers and several buyers; there are minimal restrictions to the selection of a seller by a buyer; and the cost of entering the market or leaving it is not a major obstacle to industrial adjustment.
- 13 The advantage of the free and functioning market proxy is that it reflects the rational decision-making of economic agents faced with reality.
- 14 In this report, I apply the principle of the market proxy to both the transactional tariff and the comprehensive tariff.

TRANSACTIONAL TARIFF

- 15 In the case of the transactional tariff for the taping of television programs for educational use, the existing market for purchasing copies of programs accompanied with unlimited performance rights within education institutions provides an excellent free-market comparison point. There are some differences between the two situations — e.g., purchased copies have no commercials and they are often offered with supportive pedagogical material; on the other hand, off-air programming is varied and up-to-date — but they are minor enough that the comparison is informative to the Copyright Board Canada.
- 16 Therefore, I agree with Kenneth Goldstein, author of Exhibit ERCC-6, that "A market already exists for the use of such programming in schools, based on the *physical distribution of pre-recorded programs*. Therefore, it would seem logical that data about that market would provide a useful guide in setting the rate for the use of programs that are used in the same classrooms by the same teachers, but are recorded off-air instead of distributed in boxes." (Exhibit ERCC-6, paragraph 12, emphasis added) Stephen Stohn expresses a parallel point of view in Exhibit ERCC-5, paragraph 35: "Insofar as Canada is concerned, the only analogous market to the off-air educational market created by the ERCC tariff is the existing market for the sale of audio-visual videotapes to schools, including the right to publicly perform such videotapes."
- 17 However, the ERCC calculations (Exhibit ERCC-6) need to be adjusted in three ways: first, to reflect the real size of the market; second, to restrict revenues to the physical distribution of pre-

recorded programs; and third, to reflect the copyright royalty portion of the revenues. Paragraphs 18 to 38 of this report deal with these three adjustments.

- 18 Table 1 of Exhibit ERCC-6 contains the core numbers used by ERCC in the calculation of the transactional tariff. It is reproduced here as Table 1, for convenience. From this point on in this report, any reference to tables relates to tables found in this document.

Line #	1998 A	1999 B	2000 C	1998-2000 D
Number of videos sold				
1 Elementary/secondary	79,629	92,420	108,137	93,395
2 Post-secondary	16,539	16,767	19,721	17,676
3 Total	96,168	109,187	127,858	111,071
Revenues from videos				
4 Elementary/secondary	\$6,405,678	\$6,640,158	\$7,518,825	\$6,854,887
5 Post-secondary	\$1,340,497	\$1,340,065	\$1,558,940	\$1,413,167
6 Total	\$7,746,175	\$7,980,223	\$9,077,765	\$8,268,054
Average price per video				
7 Elementary/secondary	\$80.44	\$71.85	\$69.53	\$73.40
8 Post-secondary	\$81.05	\$79.92	\$79.05	\$79.95
9 Total	\$80.55	\$73.09	\$71.00	\$74.44
Average price per minute				
10 Elementary/secondary	\$2.68	\$2.39	\$2.32	\$2.45
11 Post-secondary	\$2.70	\$2.66	\$2.63	\$2.66
12 Total	\$2.68	\$2.44	\$2.37	\$2.48

Adjustment for the size of the market

- 19 Exhibit ERCC-6 did not adjust its figures for the size of the market represented by the 11 companies which provided data. It was not necessary to do so for its purposes. However, my calculations demand that the first two sets of numbers in Table 1 be adjusted upwards to reflect total market volumes.
- 20 In response to a request for clarification concerning Exhibit ERCC-6 made to ERCC by the Education Coalition, Mr. Goldstein indicated that he had "concluded that the 11 firms responding to the survey account for about 75-80 per cent of the total market for educational video sales in Canada".
- 21 Therefore, lines 1, 2 and 3 as well as 4, 5 and 6 of Table 1 must be divided by 0.775 (mid-way between 75% and 80%) in order to reflect the total market for the physical distribution of pre-recorded

educational programs. The results of this calculation are featured on lines 5 through 7 and 12 through 14 of Table 2. This adjustment increases total "video-related revenues" (terminology used on Exhibit ERCC-6 page 16) to a three-year annual average of about 143,300 tapes and approximately \$10.7 million.

TABLE 2
Calculation of the transactional and comprehensive tariffs

Line #	Calculation for Column A	1998 A	1999 B	2000 C	1998-2000 D
Number of videos sold as per Exhibit ERCC-6 Table 1					
1	Elementary/secondary	79,629	92,420	108,137	93,395
2	Post-secondary	16,539	16,767	19,721	17,676
3	Total	96,168	109,187	127,858	111,071
Number of videos sold adjusted for the size of the market					
4	Estimated portion of the market represented in Exhibit ERCC-6 Table 1	77.5%			
5	Elementary/secondary A1 ÷ A4	102,747	119,252	139,532	120,510
6	Post-secondary A2 ÷ A4	21,341	21,635	25,446	22,807
7	Total A3 ÷ A4	124,088	140,886	164,978	143,317
Distributors' "revenues from videos" as per Exhibit ERCC-6 Table 1					
8	Elementary/secondary	\$6,405,678	\$6,640,158	\$7,518,825	\$6,854,887
9	Post-secondary	\$1,340,497	\$1,340,065	\$1,558,940	\$1,413,167
10	Total	\$7,746,175	\$7,980,223	\$9,077,765	\$8,268,054
Revenues after adjustment for the size of the market					
11	Estimated portion of the market represented in Exhibit ERCC-6 Table 1	77.5%			
12	Elementary/secondary A8 ÷ A11	\$8,265,391	\$8,567,946	\$9,701,710	\$8,845,015
13	Post-secondary A9 ÷ A11	\$1,729,674	\$1,729,116	\$2,011,535	\$1,823,442
14	Total A10 ÷ A11	\$9,995,065	\$10,297,062	\$11,713,245	\$10,668,457
Revenues after adjustment to reflect only the physical distribution of pre-recorded programs					
15	Physical distribution as a proportion of revenues, elem./sec.	65%			
16	Elementary/secondary A12 × A15	\$5,372,504	\$5,569,165	\$6,306,111	\$5,749,260
17	Physical distribution as a proportion of revenues, post-sec.	86%			
18	Post-secondary A13 × A17	\$1,487,519	\$1,487,040	\$1,729,921	\$1,568,160
19	Total A16 + A18	\$6,860,024	\$7,056,205	\$8,036,032	\$7,317,420
Adjustment for the copyright royalty portion of the revenues					
20	Copyright royalty as a proportion of retail cost	30%			
21	Elementary/secondary A16 × A20	\$1,611,751	\$1,670,749	\$1,891,833	\$1,724,778
22	Post-secondary A18 × A20	\$446,256	\$446,112	\$518,976	\$470,448
23	Total copyright royalties derived from the physical distribution of pre-recorded programs A19 × A20	\$2,058,007	\$2,116,861	\$2,410,810	\$2,195,226
Average copyright royalties per pre-recorded program copy					
24	Elementary/secondary A21 ÷ A5	\$15.69	\$14.01	\$13.56	\$14.31
25	Post-secondary A22 ÷ A6	\$20.91	\$20.62	\$20.39	\$20.63
26	Both levels A23 ÷ A7	\$16.59	\$15.03	\$14.61	\$15.32
Average copyright royalties per minute of pre-recorded program					
27	Elementary/secondary A24 ÷ 30	\$0.52	\$0.47	\$0.45	\$0.48
28	Post-secondary A25 ÷ 30	\$0.70	\$0.69	\$0.68	\$0.69
29	Both levels A26 ÷ 30	\$0.55	\$0.50	\$0.49	\$0.51

Adjustment to reflect only the physical distribution of pre-recorded programs

- 22 The proxy for the transactional tariff is the physical distribution of pre-recorded programs (see paragraph 16 of this report and Exhibit ERCC-5, paragraph 12). The proxy includes the purchase of the pre-recorded program as a physical product and the acquisition of the right to perform the program in classrooms.
- 23 In an attempt to capture the monetary value of pre-recorded educational programs, Mr. Goldstein obtained information from eleven Canadian program distributors using the questionnaire presented at Appendix 2 of Exhibit ERCC-6. Video sales revenues were separated into three market segments according to the type of educational institution (schools, school boards or provincial media centres and post-secondary institutions). Within each segment, video-related revenues were defined as including "payment for videos, plus any other payments from this market segment with respect to rentals, master tapes, duplication rights, etc." (Exhibit ERCC-6, page 16).
- 24 Including revenues other than revenues from the physical distribution of pre-recorded programs is inappropriate considering the agreed upon proxy. The transactional tariff gives educational institutions access to individual programs as a substitute for a purchase. It does not give them access to master tapes, nor does it provide them with duplication rights. In fact, paragraph 16 of the proposed ERCC tariff (Exhibit ERCC-3) states that "Payment of the royalty [...] shall entitle the educational institution or any persons acting under its authority to make **one** copy of the work or other subject-matter and to perform **that** copy in public one or more times in the circumstances described in section 6(b)" (emphasis added). Moreover, leaving the revenue category open ("etc.") leaves me doubtful of what other revenues could have been included by distributors.
- 25 In order to correct the situation, I requested the following information from a selection of educational media centres across Canada:
- "1) How much did your media centre pay for the acquisition of video-related materials over the past twelve months? PLEASE INCLUDE payments for the purchase of pre-recorded video tapes, the rental of pre-recorded video tapes, master tapes, duplication rights plus any other expense directly related to acquisitions into your video collection (if there are other such expenses, please indicate their nature).

- 2) How much of the amount in question 1 went to the purchase of pre-recorded video tapes?
- 3) How much of the amount in question 1 went to the acquisition of duplication rights or to their renewal?"
- 26 In the short time available, information could be collected from 27 media centres. Information was obtained from a range of media centres including small and large school boards, provincial centres, community colleges and universities. While I don't claim that these 27 centres constitute a random sample of media centres in Canada, they do offer a perspective on seven provinces and territories — Nova Scotia, New Brunswick, Quebec, Ontario, Alberta, British Columbia and Yukon. Moreover, these data are the best available to correct the wrongful inclusion of revenues other than those flowing from the physical distribution of pre-recorded programs, the agreed upon proxy.
- 27 Among the 16 elementary and secondary institutions, the physical distribution of pre-recorded programs accounted for 65% of expenditures on video-related materials; duplication rights accounted for 34%. Among the 11 post-secondary institutions, the physical distribution of pre-recorded programs accounted for 86% of expenditures and duplication rights for 8%.
- 28 Distributors' revenues used in Exhibit ERCC-6 must be reduced to discard revenues from sources other than the physical distribution of pre-recorded programs. In Table 2, lines 12 and 13 were multiplied by the proportion of the revenues accounted for by sales of pre-recorded programs (65% and 86% respectively for elementary/secondary institutions and post-secondary institutions). For example, distributors' revenues from the elementary/secondary sector in 1998 totalled \$8,265,391 (line 12); according to the data collected from media centres, 65% (line 15) of that amount went to the purchase of pre-recorded programs, or \$5,372,504 (line 16). Separate factors were used for distributors' revenues flowing from elementary/secondary institutions and from post-secondary institutions since the proportion that sales of pre-recorded programs represent of total revenues is different from the two segments. The results are presented at lines 16 and 18 in Table 2; line 19 totals the adjusted revenues.

Adjustment for the copyright royalty portion of the revenues

- 29 ERCC is entitled to collect royalties equivalent to the value of the copyright rights it represents.
- 30 The market figures presented at lines 4 through 6 of Table 1 include much more than the value of the copyright royalties, though. Indeed, the sales price of a pre-recorded program includes a large array of costs essential to carrying out the business of distribution. These costs include, but are not necessarily limited to: pre-production costs such as the identification of titles and the negotiation of agreements; production costs such as copying and packaging; sales costs such as marketing, the maintenance of a Web site and invoicing; physical distribution costs; after-sales costs such as the handling of returns and bad debts; and profits. ERCC is not entitled to collect for the elements of the price of a pre-recorded educational program which are not directly related to the copyright rights it represents.
- 31 Unlike ERCC which, through its members, has access to the contracts established between distributors and rights holders, I have no direct way to estimate the proportion of the pre-recorded program sales price which is returned to rights holders. The Education Coalition will present in evidence a schedule to a contract used by a Canadian distributor to specify the value of copyright royalty payable to the copyright holder. It states that 30% of the gross price will be redeemed to the copyright holders for non-theatrical educational distribution. In the absence of other evidence, I have used that figure to calculate the portion of distributors' revenues to which ERCC is entitled.
- 32 Lines 21, 22 and 23 of Table 2 contain the value of the copyright royalties which are generated by the physical distribution of pre-recorded programs to educational institutions in Canada. They are the result of multiplying lines 16, 18 and 19 (Table 2) by the royalty portion stated at line 20. These are the key figures from which the tariffs proposed here flow.

Value of the copyright royalties on a per-minute basis

- 33 ERCC has proposed a transactional tariff based on minutes of programs used: "an educational institution operating under the transactional tariff shall pay a royalty for each copy of a work or other subject-matter made in a calendar year: [...] b) where the copy is of a work or other subject-matter communicated to the public by a

television signal, a royalty of \$2.40 for each minute or part thereof'. (Exhibit ERCC-3, paragraph 15)

- 34 Therefore, the correct proxy value for the transactional tariff is the per-minute value of the copyright royalties derived in the market for the physical distribution of pre-recorded educational programs.
- 35 The previous paragraphs calculated the overall value of the copyright royalties derived from this market (line 23 in Table 2). The per-minute value can be determined by dividing this overall value by the number of tapes sold and again by the average length of programs.
- 36 Lines 24, 25 and 26 of Table 2 present the per-program value of the rights to which ERCC is entitled. These figures are simply derived from the division of the overall value of the rights (Table 2, lines 21-23) by the number of copies sold, as reported in lines 1-3 of Table 2 and adjusted to reflect the real size of the market (lines 5-7 of Table 2).
- 37 The three-year average value of the rights, on a per-program basis, is \$15.32 (Table 2, line 26). The gap observed between the elementary/secondary and the post-secondary segments is mainly due to the difference in the proportions of the respective budgets for video-related materials that are allocated to the purchase of pre-recorded programs (as opposed to other expenses such as duplication rights).
- 38 I accept the Exhibit ERCC-6 estimate that the average program length is 30 minutes. The per-minute value of the copyright royalties, presented at lines 27, 28 and 29 of Table 2, is the division of the per-program value of the copyright royalties by the average duration of programs. This results in a value of \$0.51 per minute for the entire education system, based on a three-year average. Note that the yearly figure has been decreasing over the three-year period (\$0.55 in 1998, \$0.50 in 1999 and \$0.49 in 2000).

COMPREHENSIVE TARIFF

- 39 In its evidence, ERCC concluded that educational sales of pre-recorded programs is "of limited value in establishing a proxy for the comprehensive tariff" (Exhibit ERCC-5, paragraph 44).
- 40 In my view, the Canadian market for the physical distribution of pre-recorded educational programs represents the best available proxy for the comprehensive tariff. However, the perspective adopted to reach this conclusion is not the same as in the case of the transactional

tariff where an average purchase of a television program can easily be compared to the average taping of a television program.

- 41 In the case of the comprehensive tariff, the parallel is made at the level of the entire market. *The sum of all expenditures made by the education system on purchases of pre-recorded programs represents the value that the education system attaches to television programs as a teaching tool.* It corresponds to the equilibrium point between budget pressures and the usefulness of audio-visual materials. In essence, *it is a market-established value for all pre-recorded programs as aids to teaching.*
- 42 The comprehensive tariff provides educational institutions with an unlimited license to tape television programs; therefore it represents a substitute for all use of pre-recorded programs, which usually provide unlimited public performance rights. Since educational institutions must work within a fixed budget, they will not have the latitude of acquiring access to taping under the comprehensive tariff while keeping a significant budget for the purchase of programs. From an educational institution's point of view, the comprehensive tariff is a complete substitute for the current purchase market — a fact which makes the complete purchase market a good proxy for the value of the comprehensive tariff.
- 43 This is a logical extension of the proxy presented by ERCC to establish the value of the transactional tariff.

TABLE 3
Calculation of the comprehensive tariff

Line #	Calculation for Column A	1998 A	1999 B	2000 C	1998-2000 D	
Copyright royalty portion of the revenues						
1	Elementary/secondary	From	\$1,611,751	\$1,670,749	\$1,891,833	\$1,724,778
2	Post-secondary	Table 2	\$446,256	\$446,112	\$518,976	\$470,448
3	Total	in this report	\$2,058,007	\$2,116,861	\$2,410,810	\$2,195,226
Full-time equivalent students (see Table 4 for sources)						
4	Elementary/secondary		4,821,458	5,170,722	5,169,281	5,053,820
5	Post-secondary QC 1999-2000, others 2001		1,080,298	1,076,152	1,096,079	1,084,176
6	Total		5,901,756	6,246,874	6,265,360	6,137,997
Average rights value per FTE						
7	Elementary/secondary	A1 ÷ A4	\$0.33	\$0.35	\$0.39	\$0.36
8	Post-secondary	A2 ÷ A5	\$0.41	\$0.41	\$0.48	\$0.44
9	Both levels	A3 ÷ A6	\$0.35	\$0.36	\$0.41	\$0.37

- 44 The total value of the educational market for the physical distribution of pre-recorded programs was estimated earlier in order to calculate the value of the transactional tariff. Based on data in Exhibit ERCC-6, the figures must be increased to represent the entire market. They must then be reduced to account only for the physical distribution of pre-recorded programs (since the comprehensive tariff does not include duplication rights, rentals, master tapes, etc.) and adjusted to represent the copyright royalty portion of the sales price.
- 45 It is justifiable to retain only the copyright royalty portion of the sales price for the calculation comprehensive tariff since: 1) ERCC is entitled only to the compensation for copyright royalties flowing to rights owners and 2) under the comprehensive tariff (as is the case in fact for the transactional tariff), costs normally borne by distributors are passed on to the education institutions, such as the costs associated with the identification of suitable programs, with planning to make the recordings, with the equipment required to make the recordings, with record keeping, etc..
- 46 ERCC has expressed its comprehensive tariff based on the number of full-time equivalent (FTE) students in educational institutions (Exhibit ERCC-3, paragraph 11, with a definition for FTEs at paragraph 4). I will do the same.
- 47 I propose that the best proxy for the per-FTE comprehensive tariff is the per-FTE value of the copyright rights generated by the current educational market for the physical distribution of pre-recorded television programs. These copyright rights have already been calculated at lines 21, 22 and 23 of Table 2, which have been reproduced at lines 1, 2 and 3 of Table 3.
- 48 Lines 4, 5 and 6 of Table 3 report the number of FTEs by year and by market segment. The sources of the FTE numbers are listed in Table 4.
- 49 The per-FTE value of the copyright rights generated by the educational market for the physical distribution of pre-recorded television programs is the result of the division of the sum of the rights (lines 1-3 in Table 3) by the number of FTEs (lines 4-6 of Table 3). Lines 7, 8 and 9 of Table 3 report the result of the division.
- 50 Based on the three-year annual average of this proxy applied jointly to the elementary/secondary and post-secondary segments, the value of the ERCC comprehensive license, on a per-FTE basis, is \$0.37.

TABLE 4 • FTE data sources

	1998	1999	2000
Elementary/ secondary sector	Statistics Canada ^{1,2}	Cancopy Ministère de l'éducation du Québec	Cancopy Ministère de l'éducation du Québec
Community colleges and cegeps ³	Statistics Canada ³	Unavailable, used 1998	Unavailable, used 1998
Universities and degree granting colleges	Statistics Canada ⁴	Cancopy, 2001 Ministère de l'éducation du Québec ⁵	Cancopy, 2001 Ministère de l'éducation du Québec ⁵

¹ *Education in Canada 2000*, Catalogue no. 81-229-XIB
² Excludes continuing education in Quebec.
³ <http://www.statcan.ca/english/Pgdb/People/Education/educ02a.htm>
⁴ <http://www.statcan.ca/english/Pgdb/People/Education/educ03a.htm>
⁵ http://www.meq.gouv.qc.ca/STAT/Bulletin/bulletin_22.pdf

IMPERFECTION OF THIS QUANTITATIVE ASSESSMENT OF VALUE

- 51 My quantitative assessment of the value of taping of educational programs is entirely based on equating the preferences expressed by the education system through its purchase of pre-recorded programs with the benefits supplied under the Copyright Act and the ERCC tariff. This approach implies that a copy of a taped program has the same value as a pre-recorded copy of a program purchased from a distributor.
- 52 This assumption could be challenged. In fact, Exhibit Coalition-6 indicates that copies have less value for educators because 1) they are not necessarily subject to a pedagogical assessment, 2) they may contain commercial interruptions, 3) they are not usually accompanied by pedagogical guides, 4) they require the teacher to invest time to make the recordings and 5) they cannot be replaced (if a taped program is damaged, it can only be taped if a program is broadcast again).
- 53 It appears that a taped copy has less value to educators than a pre-recorded copy purchased from a distributor. Therefore, the copyright rights and tariff values calculated in this report overestimate the value of taped copies to educators.

CURRICULUM VITAE

Mr. Gauthier has very strong experience in research-in academic, private and public settings. He has specialized in strategic and organizational research and intervention, in market research, in program evaluation, in applied social research and in policy analysis. Over the years, his involvement in more than 200 research and intervention assignments has allowed him to build a particular expertise in the measurement and the management of client satisfaction, health and social services, technology, immigration, housing, human resource management, arts and culture, and management information systems. From a methodological standpoint, Mr. Gauthier has developed an enviable reputation as a top level quantitative and qualitative analyst as well as a strong project manager.

After his doctoral studies, Mr. Gauthier has successively occupied the positions of chief of research in a branch of Justice Canada, senior evaluator at the Canada Mortgage and Housing Corporation, evaluation manager then director of program evaluation at Communications Canada and senior vice president and chief of operations at Ekos Research Associates. Early in 1996, he founded Circum Network Inc.. Since then, Mr. Gauthier has developed an interest for organisational management issues; this interest has allowed him to bridge measurement concerns and management concerns. He has acquired the Certified Management Consultant professional certification. He is a member of the Ordre des administrateurs agréés du Québec.

Mr. Gauthier has taught social research methodology, program evaluation and decision making methods at the undergraduate and graduate levels at the Quebec École nationale d'administration publique, at the University of Ottawa and at the Université du Québec à Hull. He is still involved in teaching at ÉNAP et UQAH. He is the editor of the textbook entitled *Recherche sociale : de la problématique à la collecte des données*, an introduction to social research which has gone through three editions so far (1984, 1992 et 1997; Presses de l'Université du Québec).

Mr. Gauthier has completed a masters degree in political science at Université Laval, a masters degree in public administration at ENAP and the course work and comprehensive examinations towards a doctorate in political science at Carleton University.

STUDIES AND CERTIFICATIONS

- Certified Management Consultant (CMC; 1999; certified for the preparation of PSGGR conformity opinions in March 2001)

- Masters (Public Administration), École nationale d'administration publique, Québec (1991)
- Masters Diploma (Public Sector Management), École nationale d'administration publique, Québec (1987)
- PhD, course work and comprehensive examinations (Political Science), Carleton University, Ontario (1984)
- Masters (Political Science), Laval University, Québec (1979)
- BA (Political Science), Laval University, Québec (1978)

ADDITIONAL TRAINING

- *Formation en saine gestion des entreprises et des organisations, Part B*, Seminar from the Ordre des administrateurs agréés du Québec given by Deveaux Brault et Associés, December 2000
- *Formation en saine gestion des entreprises et des organisations, Part A*, Seminar from the Ordre des administrateurs agréés du Québec given by Deveaux Brault et Associés, October 1999
- *Atelier de saine gestion I*, Seminar from the Ordre des administrateurs agréés du Québec, March 1999
- *Service Quality and Customer Satisfaction Measurement*, Seminar given by Chuck Chakrapani on behalf of the Professional Marketing Research Society, November 1996

PROFESSIONAL AFFILIATIONS

- Certified Management Consultant (CMC); certified for the preparation of PSGGR conformity opinions
- Member, Ordre des administrateurs agréés du Québec (Adm.A.)
- Member, Canadian Evaluation Society
- Member, Société québécoise d'évaluation de programmes
- Member, American Evaluation Association
- Professional member, Professional Market Research Society
- Member, American Association for Public Opinion Research

CONFERENCES SINCE 2000

- *Assessing Survey Research, A Principled Approach*, presentation at the 2001 Canadian Evaluation Society conference, Banff, May 21, 2001.
- *Learning about survey research through a principled approach*, half-day workshop offered at the 2001 Canadian Evaluation Society conference, Banff, May 20, 2001.
- *Assessing Survey Research, A Principled Approach*, presentation at the 2001 conference of the American Association for Public Opinion Research, Montreal, May 19, 2001.
- *Assessing Survey Research, A Principled Approach*, presentation at the 2001 *Riding the Communications Revolution* Professional Marketing Research Society conference, Ottawa, April 24, 2001.
- *Comment mesurer adéquatement le taux de satisfaction de sa clientèle?*, half-day workshop at the conference entitled *Le service à la clientèle: virage-client dans le secteur public*, organized by the Institute for International Research, Quebec, January 24, 2001.
- *La mesure de la satisfaction de la clientèle*, one-day workshop for the Société québécoise d'évaluation de programmes, Quebec, October 5, 2000.
- *Internet and Program Evaluation, The Non Existent Relationship*, presentation for the National Capital chapter of the Canadian Evaluation Society, Ottawa, September 26, 2000.
- *L'évaluation de la satisfaction de la clientèle, méthodes et limites*, half-day workshop at the 2000 Joint Annual Conference of the Canadian Evaluation Society and of the Société québécoise d'évaluation de programme, Montréal, May 14, 2000.

PAST PROFESSIONAL EXPERIENCE

Executive Vice-President and Chief of Operations, Ekos Research Associates, 1989-1996

- Management and participation in almost 100 research assignments dealing primarily with program evaluation and public opinion research. A thematic list of projects is appended.
- Daily management of a company staffed with 25 full time employees and about 150 part time employees.

Director of Program Evaluation, Communications Canada, Ottawa, 1988-1989

- Responsible for the quality, the usefulness, the pertinence and the synchronization of evaluation studies and their transcription into strategic advice

Senior Program Evaluation Manager, Communications Canada, Ottawa, 1986-1988

- Management of program evaluation studies used by the department for strategic planning, resource allocation and program planning and analysis

Senior Program Evaluation Manager and Methodologist, Canada Mortgage and Housing Corporation, Ottawa, 1983-1986

- Preparation of program evaluation studies used by the department in strategic planning and in program planning and analysis

Chief of Research, Canadian Unity Information Office, Ottawa, 1983

- Management of a multidisciplinary team dealing with requests for program evaluation studies, market research studies, mass communication research and attitude and opinion measurement.

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