

OPEN & CLOSED PROJECT

UNITING GLOBAL KNOWLEDGE OF ACCESSIBLE MEDIA

The OPEN & CLOSED PROJECT is a public-private-academic partnership pursuing research, standardization, training, and certification in accessible media. Its chief goal is the creation of the first-ever unified set of recommended practices for the four disciplines of accessible media – how-to manuals for captioning, audio description, subtitling, and dubbing. The project will also conduct research, develop needed infrastructure, and train and certify practitioners.

THE NEED

WE ALL USE ACCESSIBLE MEDIA. At some point in our lives, every viewer of TV, home video, or cinema makes use of accessibility features. Some typical usages are well known:

- ¶ A deaf person watches *The Simpsons* with captioning, while, in a living room across town, a blind person enjoys the same show with audio description.
- ¶ A pair of young cinephiles watch *Miyazaki's Spirited Away* in its English dubbed version. The next weekend, they scour the foreign-film section of the video store and bring home the DVD of *Run Lola Run*, which they enjoy with English subtitles.

“Accessibility” is generally understood to refer to the needs of people with disabilities, but it can be defined more generally as accommodating characteristics a person cannot change (or cannot change easily). An inability to hear or see is similar to an inability to understand a particular language.

Even viewers without disabilities who do understand the main language used in their country will still use accessibility features from time to time, as in a short foreign-language passage in a movie (where subtitles might be provided) or in a noisy public place (where closed captions might be helpful).

Accessibility, then, is widely used. But there's a problem.

LACK OF STANDARDS

There are almost no standards for accessible media. *Technical* standards are available: You can look up the exact file format used to add closed captions to a videotape, for example. But the *practice* of accessibility is unstandardized.

A few “guidelines” for captioning and audio description have been published (as in the U.K. and Australia), and one book on subtitling is in print. But there is no single set of trusted reference books that practitioners in the captioning, description, subtitling, and dubbing fields can turn to in order to produce high-quality work.

The result? *Everyone does things differently.* Captions all look different and behave differently depending on who created them. Subtitles vary noticeably. Audio description, the newest form of accessibility, has already taken many divergent forms. And the discrepancies in dubbing are so well-known that they have become a trade dispute (where dubbing tracks from one country are claimed to be substantially different from – and better than – tracks from another country).

- ¶ **FOR THE VIEWER**, the result is confusion. To use one example, watching a single evening of captioned TV can expose a viewer to a half-dozen different captioning styles; even consecutive TV commercials can be captioned differently. In effect, viewers must continuously relearn how to watch TV, film, and video with access features. Programming isn't simply *accessible*; it's accessible in a range of ways that differ for no firm reason.

¶ **FOR PRODUCERS**, the result is reduced value for money. Every practitioner naturally claims that its way is the best. (The more candid among them might admit their work is “good enough.”) But producers have no objective way to judge those claims. Producers never know if their investment in accessibility is really paying off.

¶ **FOR BROADCASTERS & EXHIBITORS**, the lack of standardization means you can’t really be sure you’re serving viewers. You may not receive complaints, but that is no proof that viewers are satisfied or that accessibility is of high quality. It can be difficult for a deaf or a blind person, or someone with a language barrier, to file a complaint in the first place. (And by that time, the show is over.) Without standardization, you may be providing accessibility in a way that is inadequate and frustrating to your audience.

LACK OF TRAINING & CERTIFICATION

Most everyone working in accessibility today is self-trained or was trained by the company they work for. Practitioners can represent themselves as experts with no way to prove it – and no way for anyone else to disprove it.

While a couple of subtitling courses are available in Europe, in broad terms there is no standard, recognized diploma one may seek in any of the fields of accessible media. Nor, for that matter, are access techniques meaningfully taught in film school or in TV and video production courses. With no recognized training, there is no way to certify practitioners as meeting standards.

THE SOLUTION

The OPEN & CLOSED PROJECT intends to solve all these problems through a combination of research and development; standardization; training; and certification.

RECOMMENDED PRACTICES

OPEN & CLOSED will publish *the first-ever unified set of recommended practices* for each of the four accessibility techniques – how-to manuals for captioning, audio description, subtitling, and dubbing.

When we say *single set of recommended practices*, we mean one manual for each discipline (in print, online, and in accessible alternates). Each manual will take into account the needs of different technologies, languages, and locales. For example, U.S. English Line 21 closed captioning is different from Canadian French Line 21 closed captioning, both of which are different once again from open captioning for movies, DVD captioning, captions added to online video, and other forms.

The results will not be generic or vague. In fact, the recommended practices will be precisely detailed and will cover a wide range of real-world scenarios based on decades of experience. There will be no need for practitioners to reinvent the wheel; each manual will attempt to cover every typical issue, question, or technique – and an enormous range of atypical ones.

Collaborative development

Today’s practitioners compete with one another. How will OPEN & CLOSED arrive at consensus?

The answer: We won’t.

Recommending a single set of practices makes it impossible to reach universal agreement; someone is always going to disagree. The difference here is that everyone has a chance to contribute to the process. True to the Internet era, all standardization discussions will be posted for online comment. After sufficient rounds of consultation, the best solution to each problem will become the recommended practice.

The project will limit an emphasis on feeling and habit, encouraging evidence and fact instead. Discussions based on opinion will be discouraged (“I really like that idea” or “That’s not how we do things here”), while discussions based on reasons or research will be favoured (“This idea is better *because*” or “We surveyed 50 people on that topic, and here’s what we found”).

Our approach has a number of advantages:

- ¶ **TRANSPARENCY.** Everyone can follow the discussion and contribute.
- ¶ **POPULARIZATION.** Practitioners will no longer be the only ones deciding how accessibility is done. Viewers, producers, broadcasters, exhibitors, and everyone else can join in.
- ¶ **REDUCING TERRITORIALITY.** Practitioners have tended to guard their own techniques like state secrets even though they're often plainly obvious. The OPEN & CLOSED process is truly *open*.

Board of advisors

It's important to understand that the process is *not a vote* and *is not consensus*. Why not?

- ¶ **VOTING TENDS TO BE INCONCLUSIVE.** Research in the captioning field suggests that, given the option to vote on various techniques based on matters of opinion ("Which option do you prefer?"), captioning viewers rarely give a single option a majority vote.
- ¶ **CONSENSUS IS IMPOSSIBLE.** The reason we need the OPEN & CLOSED PROJECT is because a consensus on techniques has not been reached so far.

Instead, the project will use a board of advisors who, along with the project director, attempt to rationally decide on recommended practices. (The composition of the board has not been determined at this early stage, but will likely include practitioners, researchers, viewers or consumers, and others. The board must and will be a fair and balanced cross-section.)

Now, one reason why accessibility techniques have diverged can be traced to the fact that several approaches work almost equally well and are not demonstrably wrong. In those cases, the project will simply decide on one option. In other cases, the right way to do things is not obvious and may require research to arrive at an answer, which the project will endeavour to conduct.

But in every case, the OPEN & CLOSED PROJECT will make *single* recommendations. The result will be one set of recommended practices – the first authoritative reference in the four fields of accessible media.

Publication formats

The recommended practices will be published in a range of formats. The reference format will be a combination of printed books and videos. An online presentation, and accessible alternate formats and translations, will be provided.

TRAINING AND CERTIFICATION

Once the set of recommended practices is available, what do we do with it? *We train and certify practitioners*. This isn't a hypothetical project; we want the practices put into practice.

The *training* stage will involve partnerships with academic institutions and (especially) film and postproduction schools. Through distance education (in particular, online courseware) and through crucial face-to-face training, we will actually teach the recommended practices.

We'll train trainers so the recommendations can be more widely dispersed and reach more people.

We'll also develop a *certification* program. It will finally be possible to earn a diploma in captioning, description, subtitling, dubbing, or any combination thereof. Several models are available for such a program, including certification based on a combination of portfolio evaluation (examination of previous work), a written test, and a personal interview. At that point, the applicant would be deemed a certified practitioner of the OPEN & CLOSED PROJECT's recommended practices. Since the certificate would not be government-issued, it would not constitute a license.

RESEARCH

The OPEN & CLOSED PROJECT will conduct needed research. Goals include:

- ¶ **RESOLVING DISPUTES.** We can test one approach against another.
- ¶ **IDENTIFYING FUTURE PRACTICES.** We'll test and recommend new practices for new technologies, like high-definition TV and digital cinema.
- ¶ **UNDERSTANDING INTERACTIONS.** We'll explore interactions among accessibility techniques – e.g., dubbed movies with captioning or TV shows with captions *and* descriptions.

Research like this doesn't have to be expensive. Even relatively small subject cohorts can give meaningful data. At present, though, there's almost *no* meaningful data, and what little research that exists tends to be unknown to practitioners or ignored.

INFRASTRUCTURE DEVELOPMENT

Audiovisual accessibility urgently requires infrastructure improvements, which OPEN & CLOSED will provide.

¶ **INTERCHANGE FORMATS.** It's all but impossible to exchange caption and subtitle files from one system to another. It's not widely known that interchange of description and dubbing tracks is also an issue. OPEN & CLOSED will develop XML document-type definitions that will account for file and technology formats (e.g., Line 21 captions converted to DVD subpictures); language, national and content variations (e.g., director's cut, or airplane or TV versions); and other factors. The resulting ACCESSIBILITY EXCHANGE™ or .JEX™ file format will be non-proprietary and available for universal use.

¶ **FONTS.** When viewers complain about captions and subtitles, often what they're really complaining about is readability. There are no viable onscreen typefaces (*screenfonts*) specifically engineered for captioning and subtitling. OPEN & CLOSED will hire seasoned designers to develop a wide range of typographically sound and readable screenfonts.

GLOBAL REACH

This is a global project based in Canada. As a bilingual country with an enormous range of accessible media – including more captioned TV than anywhere in the world; a large dubbing and subtitling industry; and widespread use of all four accessibility techniques in first-run movie houses – Canada has some advantages in developing accessibility standards.

But when we say *global*, we mean it, and that definitely includes publishing recommendations for U.S. practices, not to mention accessibility as it is engaged in Europe, Australia, India, and other parts of the world.

SUPPORTED BY RESEARCH & INDUSTRY

A December 2003 report on captioning in the U.S. stated: "It is now important to conduct research that assesses the best practices for closed-captioning style and speed.... This might include exploring whether different types of captioning

conventions should be used for different program genres." The OPEN & CLOSED PROJECT fits the bill nicely. Additionally, the PROJECT has received letters of support from throughout the postproduction and accessibility industries.

BENEFITS

The OPEN & CLOSED PROJECT will benefit a number of groups:

¶ **PRACTITIONERS** finally can prove to the world that they're doing solid, reliable work. They can then compete on their thoroughness and competency in implementing the recommended practices.

¶ **PRODUCERS, BROADCASTERS, & EXHIBITORS** will have a usable baseline: It will be possible to require that all suppliers be OPEN & CLOSED–certified.

¶ **VIEWERS** can finally be assured that the accessibility techniques they use are carried out on the basis of research, fact, and standards. They can also insist that producers, broadcasters, and exhibitors use only certified practitioners.

PARTNERSHIPS & NEXT STEPS

The OPEN & CLOSED PROJECT is just getting underway. At press time, we have a verbal cooperation agreement with the University of Toronto. We hope for further agreements with other academic and training institutions.

The project will pursue non-profit incorporation. We expect the *development stage* (for the recommended practices, infrastructure, and early training materials) will take four years. Implementation of the training regimen and a certification process will come later.

Total budget for the development stage may be approximately \$5–\$7 million (Canadian). We're actively interested in partnerships and contributions, whether financial, in-kind, or otherwise.

CONTACT

Contact the project director, **JOE CLARK**, at 416 461-6788 or joeclark@joeclark.org.