

제1회 글로벌 문화산업 포럼

1st Global Culture Industry Forum

아시아 문화산업의 네트워킹

Networking Asian Culture Industries

2004년 11월 24-25일 서울 그랜드 하이얏 호텔
November 24-25 Grand Hyatt Seoul



in cooperation with

- Korea Independent Production Association
- Music Industry Association of Korea
- Korean Film Council
- Korea Animation Producers Association
- CFORUM



(財)亞細亞文化産業交流財團
Korea Foundation for Asian Culture Exchange

www.ikoface.com

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제 1회 글로벌 문화산업 포럼
주제: 아시아 문화산업의 네트워킹
2004년 11월 24-25일 / 서울 하얏트 호텔 / 아시아문화산업교류재단

11월 24일 (첫째날)

시간	공통 (리젠시룸)	
09:30-10:15	등록	
10:15-10:30	개회사 (강현두 조직위원장) 환영사 (신현택 아시아문화산업교류재단 이사장)	
10:30-10:40	포럼 일정 및 주요인사 소개	
10:40-11:10	기조연설 (김동호, 부산국제영화제 조직위원장)	
11:15-11:45	초청연설 (高树勋 GAO Shuxun, 중국 문화부 정책법규사 사장)	
11:50-12:20	사례발표 (엘리자베스 로메르 Elisabeth ROHMER, EURIMAGES 부사무총장)	
12:20-13:30	오찬 (그랜드볼룸 3)	
	대중음악 (리젠시룸)	애니메이션 (로터스룸)
	사회자: 최영호 한국문화콘텐츠진흥원 본부장	사회자: 이교정 한국애니메이션제작자협회 전무이사
13:30-13:50	<발표> 저작권 사업의 현재 상황 다니구치 하지메 TANIGUCHI Hajime (일본음악출판업협회 전무이사)	<발표> 중국의 애니메이션 산업 정책 傅鐵錚 FU Tiezheng (중국 TV예술협회 만화위원회 부위원장)
13:50-14:05	<지정토론> 辛蒙摇 XIN Meng Yao (차이나레코드 브랜드담당 부장) 최정환 (법무법인 두우 변호사) 추연수 (한국음악산업협회 온라인&디지털 사업 본부장)	<지정토론> 민영문 (KBS 프로듀서)
14:05-14:20	자유토론	자유토론
14:20-14:40	<발표> 하나의 아시아, 하나의 문화 이수만 (한국음악산업협회 부회장)	<발표> 한국과 중국의 애니메이션 합작 활성화를 위한 협력방안 이병규 (서울무비 감독)
14:40-14:55	<지정토론> 赵大新 ZHAO Daxin (차이나레코드 사장) 브람 쿠샤드잔토 Bram KUSHARDJANTO (인도네시아 PT Gelar Nusantara 회장)	<지정토론> 李果 LI Guo (북경 TV 애니메이션제작중심 주임)
14:55-15:10	자유토론	자유토론
15:10-15:30	휴식	
	TV & 방송 1 (리젠시룸)	
	사회자: 최창섭 서강대 신문방송학과 교수	
15:30-15:50	<발표> 영상문화교류협력 강화와 공동 번영 및 발전의 촉진 马润生 MA Runsheng (중국 라디오, 영화 TV 프로그램 교류센터 국장)	
15:50-16:05	<지정토론> 혼마 오오히코 HONMA, Ohiko (후지TV 드라마센터 부장) 채지영 (한국문화관광정책연구원 책임연구원)	
16:05-16:20	자유토론	
16:20-16:40	<발표> 일한중 상호 의식과 대중문화교류 - 드라마를 중심으로 고하리 스스무 KOHARI, Susumu (시즈오카 대학교 부교수)	
16:40-16:55	<지정토론> 쿠니코 와타나베 Kuniko Watanabe (도호쿠 대학교 조교수) 김영덕 (한국방송영상산업진흥원 연구원)	
16:55-17:10	자유토론	
	한국 문화산업계 리더들과의 만찬 및 자유토론 / 주관: (사)문화산업포럼 (그랜드 볼룸 1)	
18:00-18:05	인사말	
18:05-18:25	축하공연	
18:25-19:00	만찬 및 참가자 소개	
19:00-20:30	자유토론	

11월 25일 (둘째날)

	영화 (리젠시툼) 사회자: 김혜준 영화진흥위원회 사무국장	
09:30-09:50	<발표> 아시아 각국의 영화시장 현황과 아시아영상문화산업 네트워크 구축을 위한 방안 김형준 (한국영화제작가협회 회장)	
09:50-10:05	<지정토론> 谷国庆 GU Guoqing (중국국가광과전영전시총국 영화국 부국장) 채희승 (미로비전 대표이사)	
10:05-10:20	자유토론	
10:20-10:40	<발표> 영화 저작권 보호기간 연장 후쿠다 케이 지 FUKUDA Keiji (일본영화제작자연맹 사무국장)	
10:40-10:55	<지정토론> 솜삭 웅락판야 Somsak WONGRATHPANYA (태국영화연맹 위원) 등 티우 느완 DANG Thieu Ngan (베트남 <영화세계> 기자)	
10:55-11:10	휴식	
11:10-12:00	자유토론	
12:00-13:20	오찬 (그랜드 볼룸 3)	
	TV & 방송 2 (리젠시툼) 사회자: 최양수 연세대 영상대학원장	원탁회의 (틀립 룸) 사회자: 김명중 아리랑 TV 부사장
13:30-13:50	<발표> 도입과 규제: 중국 TV에서의 외국 프로그램 黄升民 HUANG Shengmin (중국 커뮤니케이션대학교 광고대학장)	<주제> 아시아지역의 위성방송 협력 방안 <토론자> 阮宗勤 Ruan Zongqin (봉황TV 국제사업부장) 테루오 다지마 Teruo Tajima (일본 Opticast 전무이사) 엄주웅 (Sky-Life 본부장) 陶世明 Tao Shiming (중국국가광과전영전시총국 개혁판공실 주임) 나위야 첼라 Nawiyah CHELAH (라디오-TV 말레이시아 부장)
13:50-14:05	<지정토론> 이관열 (강원대 신문방송학과 교수) 강만석 (한국방송영상산업진흥원 책임연구원)	
14:05-14:20	자유토론	
14:20-14:40	<발표> 아시아지역TV문화산업협력에 대한 기본 관점 尤小刚 YOU Xiaogang (중베이 TV예술센터 회장)	
14:40-14:55	<지정토론> 김동성 (서암디지털미디어센터 본부장) 文春英 WEN Chunying (중국 커뮤니케이션대학교 조교수)	
14:55-15:10	자유토론	
	공동선언문 채택 및 폐회	
15:20-16:00	공동선언문 채택에 대한 토론	
16:00-16:10	공동선언문 발표	
16:10-16:20	폐회사 (강현두 조직위원장)	

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November 24-25, 2004 Hyatt Hotel, Seoul, Korea KOFACE

Day 1, November 24th

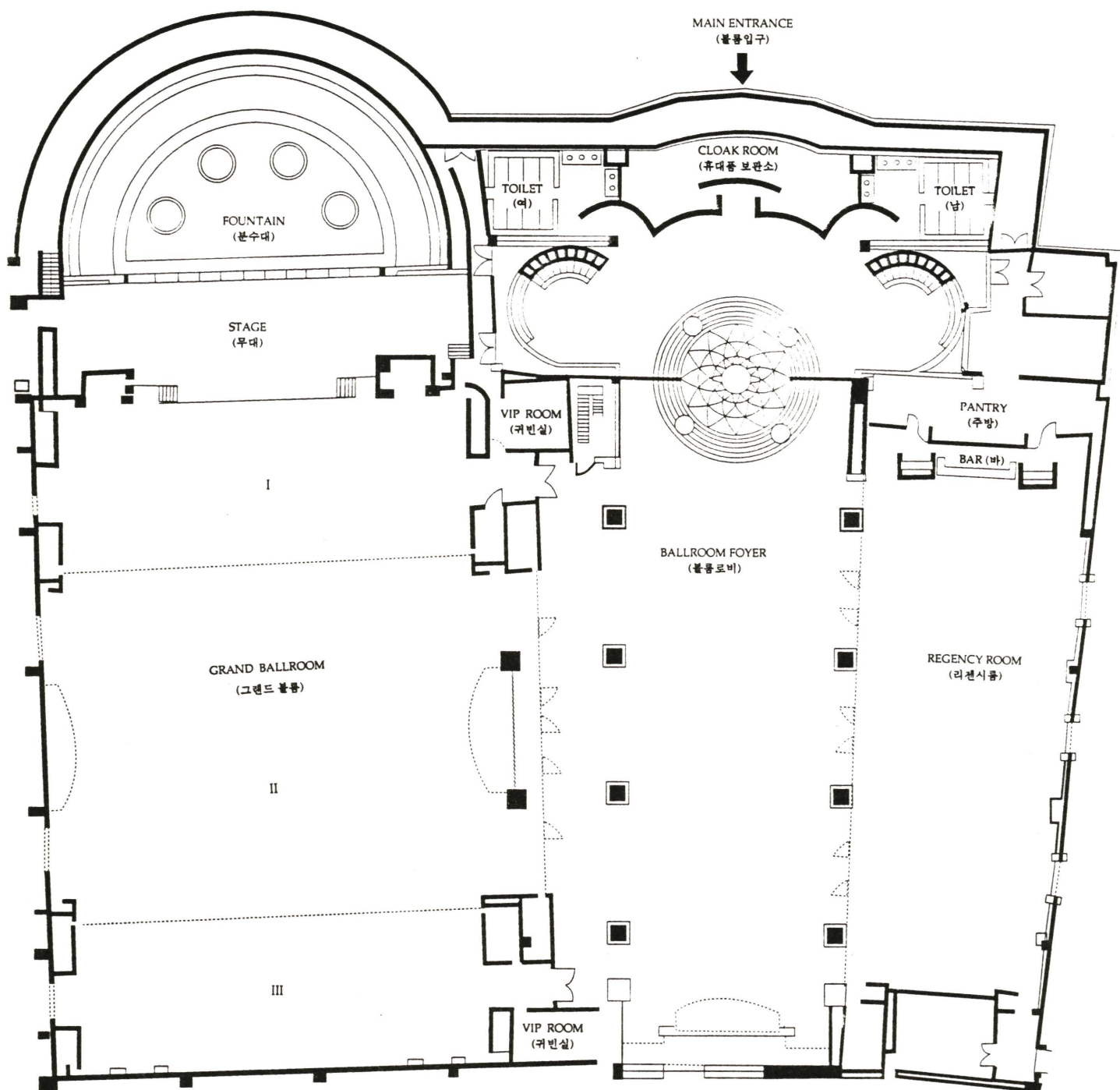
Plenary (Regency Room)	
09:30-10:15	Registration
10:15-10:30	Opening Remarks by <i>KANG Hyeondew (Chairman, Organizing Committee)</i> Welcoming Address by <i>SHIN Hyuntaek (Chairman, KOFACE)</i>
10:30-10:40	Introduction
10:40-11:10	Keynote Speech by <i>KIM Dongho (Festival Director, Pusan International Film Festival)</i>
11:15-11:45	Speech by <i>GAO Shuxun (Director of Policy & Law Dept., Ministry of Culture, China)</i>
11:50-12:20	The Case of EURIMAGES Fund by <i>Elisabeth ROHMER (Deputy Executive Secretary, EURIMAGES)</i>
12:20-13:30	Luncheon (Grand Ball Room 3)
Pop Music (Regency Room) Moderator: <i>CHOI Youngho (Executive Vice President, Korea Culture & Content Agency)</i> Animation (Lotus Room) Moderator: <i>LEE Kyojung (Executive Director, Korea Animation Producers Association)</i>	
13:30-13:50	[Presentation] The Present Condition of Copyright Business by <i>TANIGUCHI Hajime (Executive Director, Music Publishers Association of Japan)</i> [Presentation] Chinese Government Policy for Animation Industry by <i>FU Tiezheng (Vice Managing Director, Cartoon Commission of China TV Artists Association)</i>
13:50-14:05	[Designated Discussion] <i>XIN Meng Yao (Director of Brand Development Dept. China Record)</i> <i>CHOI Chunghwan (Attorney-at-law, Law Office of DW Partners)</i> <i>CHOO Yeonsu (Director of Online & Digital Business, Music Industry Association of Korea)</i> [Designated Discussion] <i>MIN Youngmun (Producer, KBS)</i>
14:05-14:20	Open Discussion
14:20-14:40	[Presentation] One Asia, One Culture by <i>LEE Sooman (Vice Chairman, Music Industry Association of Korea)</i> [Presentation] Cooperative Strategy to Foster Korea-China Animation Co-production <i>LEE Byungkyoo (Director, Seoul Movie)</i>
14:40-14:55	[Designated Discussion] <i>ZHAO Daxin (General Manager, China Record)</i> <i>Bram KUSHARDJANTO (President, PT Gelar Nusantara)</i> [Designated Discussion] by <i>LI Guo (Deputy Director, Beijing TV)</i>
14:55-15:10	Open Discussion
15:10-15:30	Coffee Break
TV & Broadcasting 1 (Regency Room) Moderator: <i>CHOI Changsup (Professor, Department of Mass Communication, Sogang University)</i>	
15:30-15:50	[Presentation] Strengthening the Communication & Cooperation in the Field of Film & TV and Promoting Common Prosperity & Development by <i>MA, Runsheng (General Manager, China Radio, Film & Television Programs Exchange Center)</i>
15:50-16:05	[Designated Discussion] <i>HONMA, Ohiko (Director, Fuji TV)</i> <i>CHAE Jeeyoung (Senior Researcher, Korea Culture & Tourism Policy Institute)</i>
16:05-16:20	Open Discussion
16:20-16:40	[Presentation] The Reciprocal Attitudes and Popular Cultural Exchange in Japan, South Korea & China by <i>KOHARI, Susumu (Associate Prof, Univ. of Shizuoka)</i>
16:40-16:55	[Designated Discussion] <i>Kuniko Watanabe (Assist. Professor, Tohoku University)</i> <i>KIM Yungduk (Research Fellow, Korean Broadcasting Institute)</i>
16:55-17:10	Open Discussion
Welcoming Dinner & Open Discussion with Korean Culture Industry Leaders Hosted by CFORUM (Grand Ball Room 1)	
18:00-18:05	Greetings
18:05-18:25	Performance
18:25-19:00	Dinner & Introduction
19:00-20:30	Open Discussion

Day 2, November 25th

	Film (Regency Room) Moderator: <i>KIM Hyaeejoon (Secretary General, Korean Film Council)</i>	
09:30-09:50	[Presentation] Recent Conditions of Film Markets in Asian Countries and Strategies for the Creation of Asian Film/Culture Industry Network <i>Jonathan H. KIM (President, Korean Film Producers Association)</i>	
09:50-10:05	[Designated Discussion] <i>GU Guoqing (Deputy Director General, State Administration of Radio, Film and Television)</i> <i>Jason CHAE (CEO, Mirovision inc.)</i>	
10:05-10:20	Open Discussion	
10:20-10:40	[Presentation] On Extension of Copyright Protection Period of Movie Films <i>FUKUDA, Keiji (General Director, Motion Picture Producers Association, Japan)</i>	
10:40-10:55	[Designated Discussion] <i>Somsak WONGRATHPANYA (Committeeman, Federation of National Film Association of Thailand)</i> <i>DANG Thieu Ngan (Reporter, Movie World, Vietnam)</i>	
10:55-11:10	Break	
11:10-12:00	Open Discussion	
12:00-13:00	Luncheon (Grand Ball Room 3)	
	TV & Broadcasting 2 (Regency Room) Moderator: <i>CHOI Yang-soo (Dean, Graduate School of Communication & Arts, Yonsei University)</i>	Round Table (Tulip Room) Moderator: <i>KIM Myung-Joong (Senior Vice President, Arirang TV)</i>
13:30-13:50	[Presentation] Introduction and Regulation: Overseas Programs in China's TV Channels by <i>HUANG Shengmin (Dean, College of Advertising, Communication University of China)</i>	Satellite Broadcasting Cooperations in Asian Region [Discussants] <i>RUAN Zongqin (Director of International Cooperation, Phoenix TV)</i> <i>TAJIMA Teruo (Managing Director, Sky-PerfecTV)</i> <i>EOM Juwoon, (Managing Director, Sky-Life)</i> <i>TAO Shiming (Manager, State Administration of Radio, Film and Television)</i> <i>Nawiyah CHELAH, Director, Radio-TV Malaysia</i>
13:50-14:05	Designated Discussion <i>LEE Kwanyoul (Professor, Dept. of Communication)</i> <i>KANG Manseok (Research Director, Korean Broadcasting Institute)</i>	
14:05-14:20	Open Discussion	
14:20-14:40	[Presentation] On Cooperations within the TV Culture Industry of Asia by <i>YOU Xiaogang (President, Beijing Zhongbei TV Art Center Co.)</i>	
14:40-14:55	[Designated Discussion] <i>KIM Dongsung (Chief Direcrtor, Digital Media Center, Kangwon National University)</i> <i>WEN Chunying (Assist. Professor, Communication University of China)</i>	
14:55-15:10	Open Discussion	
	Plenary (Regency Room)	
15:20-16:00	Wrap Up & Discussions on Joint Statement	
16:00-16:10	Announcement of Joint Statement	
16:10-16:20	Closing Remarks by <i>KANG Hyeondew (Chairman, Organizing Committee)</i>	

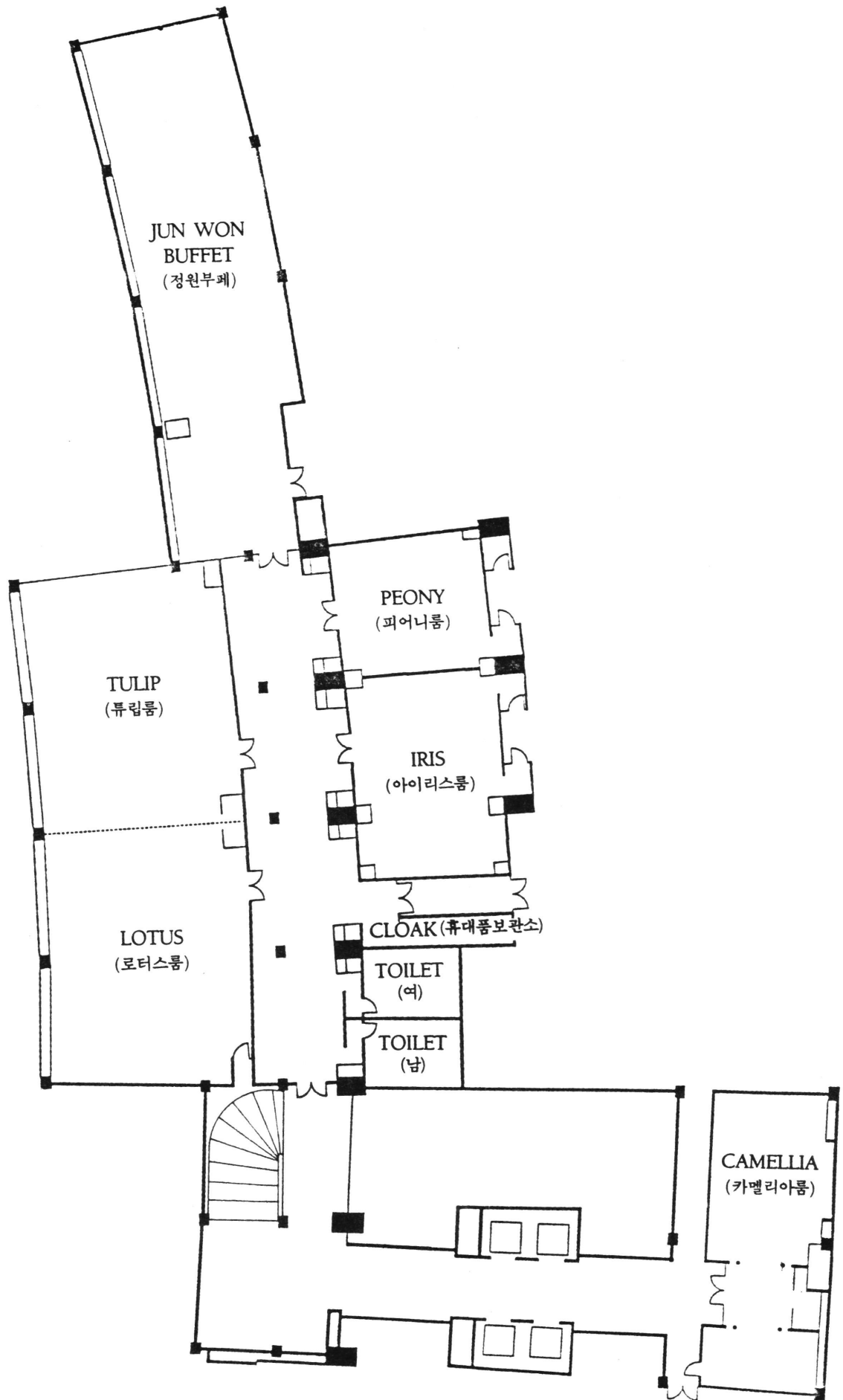
GRAND BALLROOM, BALLROOM FOYER, REGENCY ROOM

그랜드볼룸, 볼룸로비, 리젠시룸



MEETING ROOMS 2nd Floor

미팅룸 2층



全體

Plenary

<제1회 Global 문화산업 포럼 기조연설>

아시아 문화산업진흥을 위한 Networking의 필요성

김 동 호(부산국제영화제 집행위원장)

존경하는 의장,
각국 대표여러분.
그리고 이 자리에 참석하신 내외 귀빈 여러분.

본인은 오늘 <제1회 글로벌 문화산업 포럼>에 참석하여 아시아 문화산업 Networking 의 필요성에 관해 말씀드리게 된 것을 매우 영광으로 생각합니다.
또한 본인은 아시아 각국의 문화산업을 이끌고 계신 지도자 여러분을 이 자리에서 만나 뵈 수 있게 된 것을 매우 기쁘게 생각합니다.

여러분께서 잘 아시는 바와 같이 21세기는 <문화의 세기>이며 첨단미디어가 지배하는 시대입니다.

저는 먼저 우리가 살고 있는 21세기 미디어환경의 특징을 짚어보고자 합니다.

첫째, 21세기 미디어환경은 하루가 다르게 급격한 변화와 발달을 거듭하고 있다는 점입니다.

전자산업과 정보통신기술의 눈부신 발달은 지식기반산업, IT산업을 21세기를 이끄는 기간산업으로 성장시켜주었습니다.

미디어의 발전속도 또한 빨라서 <Megamedia Shakeout.>의 저자 Kevin Maney가 지적했듯이 '메가 미디어의 앞날을 예측하는 일은 다음 번개가 내려 칠 곳을 예측하는 것' 만큼이나 어렵습니다.

둘째, 미디어의 통합과 융합(convergence)현상을 그 대표적인 특징으로 꼽고자 합니다.

특히 digital기술의 발달은 문자, 음성, 영상을 하나로 묶어주고, 종전의 신문, 출판, 영화, 음반, 게임, 방송 등 각 미디어간의 장벽을 무너트렸습니다.

서로 다른 미디어가 통합하여 새로운 미디어를 창출하거나 두 개 이상의 미디어가 복합적으로 운용되기도 합니다.

전자신문, 게임, VOD, DVD, internet 방송 등이 그 대표적 예입니다.

셋째, 쌍방향 communication과 영상물의 저장, 압축, 해압 기술의 발달, 그리고 초고속정보통신망의 개발 및 확산은 지구촌을 하나로 묶는 '세계화'를 가능하게 했습니다.

특히 컴퓨터와 internet혁명은 세계화를 앞당기는 데에 크게 기여하고 있습니다.

넷째, 현대사회는 다 매체, 다 채널의 시대입니다.

지상파방송과 위성방송, CATV, internet방송의 발달은 눈부시며, 특히 digital방송의 출현은 방송채널의 수를 거의 무한대로 확장시켜 주었습니다.

이들 미디어들이 쉴새없이 쏟아내는 메시지의 홍수 속에서 우리들은 생활하고 있습니다.

다 매체, 다 채널은 하나의 메시지, 하나의 source를 여러 매체와 채널에 사용케 하는 'one source, multi-use'를 가능하게 하는 장점을 지니고 있습니다.

다섯째, 미디어간의 전략적인 제휴가 일반화되고 있습니다.

20세기 전반기까지 미디어의 수직적 통합, 예를 들면 영화의 제작회사, 배급회사, 극장을 통합하여 제작, 배급, 유통의 전과정을 장악하는 것이 지배적인

현상이었습니다.

그러나 1985년 호주의 언론재벌 Rupert Murdoch이 영화사 20세기 폭스사를 인수하면서 20세기 후반에는 미디어의 수평적 통합이 주류를 형성했습니다. Time Warner와 TBS, Walt Disney와 ABC, Seagram과 MCA, Westing House와 CBS, US West와 Continental Cable Vision의 합병 등이 그 예라고 할 수 있습니다.

1989년에 Columbia 영화사를 인수했던 일본의 Sony사가 지난 9월, 다시 MGM을 인수하기로 합의한

바 있지만, 21세기에 접어들면서 미디어그룹간의 수평적 통합보다는 서로 주식을 공유하거나, 컨소시엄을 구성하는 등의 수평적 제휴가 더 많아지고 있습니다.
이런 현상은 엄청난 비용을 수반하는 M&A보다는 수평적인 제휴와 협력이 보다 효율적이며 생산적이라는 것을 알게 된 데 기인하는 것이라고 생각합니다.

지금까지 말씀드린 미디어환경의 변화와 특징은 우리에게 다음과 같은 유추와 결론을 가능하게 합니다.
먼저 우리 사회가 첨단미디어 시대로 급속하게 진입해 갈수록 그 미디어가 전달하는 메시지, 즉 contents의 수요가 폭발적으로 늘어날 수밖에 없고, 따라서 contents산업이 21세기의 핵심 전략산업이 되지 않을 수밖에 없다는 자명한 결론에 도달합니다.
또 미디어가 담아내는 contents는 당연히 그 지방의, 또는 그 나라의 문화가 바탕이 되는 문화contents 이어야 한다는 점입니다.

저는 모두에 21세기는 <문화의 세기>라고 말씀드렸습니다.

문화는 사회와 사회구성원의 특유한 정신적, 물질적, 지적, 감성적 특성의 총체이며 예술 및 문학 형식 뿐 아니라 생활양식, 함께 사는 방식, 가치체계, 전통과 신념을 포함하고 있습니다.

문화의 궁극적인 목표는 '삶의 질'을 높이는 데 있습니다.

따라서 문화는 경제, 사회 발전의 정신적 지주일 뿐 아니라 그 건인차의 역할을 맡고 있습니다.

20세기에 경제와 기술의 개발이 최고의 가치였다면 21세기는 문화가 절대우위를 차지할 수밖에 없습니다.

특히 영화, 애니메이션, 게임, 음반, 방송 영상 등 문화산업은 21세기를 대표하는 고부가가치창출의 지식기반산업이며 전 세계적으로 연 5%이상의 고도성장을 기록하고 있으며, 그 기조에 문화예술이 뒷받침하고 있습니다.

여기서 본인은 아시아 문화가 지닌 특색을 생각해 보고자 합니다.

오랜 세월, 전통사회와 단련사회에서 은둔해 온 아시아 각국은 서양사회와는 구별되는, 서로 다른 문화와 전통, 종교와 사상, 생활방식과 관습을 지니고 있습니다.

또 같은 국가나 지역 안에서도 전통사회와 현대사회, 봉건주의와 민주주의가 공존하고 있으며 세대간에도 서로 다른 가치관을 지니고 있습니다.

이와 같은 문화의 '다양성과 복합성'이 동양문화의 특성이라고 생각합니다.

더구나 국가간에, 또는 지역간에 문화의 원활한 소통이나 교류가 거의 없었고, 오히려 문화의 갈등과 충돌이 잦았었습니다.

설상가상으로 일부국가를 제외하고는 첨단미디어의 개발과 보급에서도 낮은 수준에 머물고 있습니다.

서로 다른 문화, 서로 다른 언어는 아시아의 '세계화' 속도를 둔화시켜 왔습니다.

이러한 문화적인 배경은 '아시아문화의 세계화', '문화교류의 활성화'라는 과제를 우리들에게 안겨주고 있습니다.

'문화의 세계화'는 결코 문화의 동일화, 제도의 균일화, 문화주권의 제약을 의미하는 것은 결코 아닙니다.

문화의 다양성, 제도의 독자성, 문화주권의 존중이라는 대 전제아래 추진되어야 합니다.

따라서 국가간의, 지역간의 활발한 문화교류는 문화의 다양성과 독자성(identity)을 유지하면서 서로 다른 문화에 대한 이해를 증진시켜 줄 뿐 아니라 문화적인 격차나 그로 인한 갈등을 극복하고 문화의 발전을 가속화 시켜 줄 것입니다.

이러한 맥락에서 저는 몇 가지 제안을 드리고자 합니다.

가장 시급한 것은 오늘의 주제이기도 한 지역간, 국가간의 '문화의 network'를 구축하는 일입니다.

물론 아시아지역에서 이미 이러한 network가 구성되어 있거나, 구축 중에 있는 분야도 있습니다.

1964년에 창설된 <아시아태평양 방송연맹>(Asia-Pacific Broadcasting Union)은 52개국 100 이상의 회원을 확보하고 회원국(사)간에 방송 프로그램과 기술 및 뉴스의 교환, 방송이용의 촉진 등의 사업을 활발하게 추진하고 있습니다.

영화분야에 있어서도 부산에 본부를 둔 <아시아영화진흥기구>(Network for Promotion of Asian Cinema)가 1990년 창설되었고, 올해 10월 10일에는 부산에서 6개국 18개 Film Commission이 모여 Asia Film Commission Network(AFCNET)를 창립하였습니다.

Asia Film Industry Network 구축을 위한 움직임도 여러 곳에서 가시화 되고 있습니다.

제가 21세기 미디어환경의 특징으로 적시한 '미디어의 통합과 융화', '미디어의 전략적 제휴' 'one source multi-use'를 상기한다면 이러한 분야별 network의 구축도 중요하지만, 문화 전반을 아우르는 '문화(산업)의 network'가 보다 더 중요한 과제가 될 것입니다.

올해부터 25개 회원국으로 확대된 유럽연합(EU)은 회원국간의 문화주권을 보장하면서 지역간, 국가간의 문화교류를 적극적으로 지원하고 있다는 점에서 우리에게 귀감이 되고 있습니다.

1986년에 창설된 MEDIA는 1차 MEDIA Programme(1987-1990), 2차 MEDIA Programme(1991-1995)을 거쳐 MEDIA Programme 2(1996-2000), MEDIA Plus(2001-2005)계획을 추진해 왔으며, 최근 5년간 4억 유로를 미디어분야의 교육훈련과 개발, 보급사업을 지원하고 있습니다.

1984년에 창설된 EUIMAGE 또한 영화의 공동제작, 배급과 상영(극장)을 돕고 있습니다.

영상인력을 교육시키고 유럽아카데미영화상을 운영하는 European Film Academy도 있으며.

1988년에 발족한 유럽영화진흥기구(EFP)는 22개의 각국의 영화진흥기구의 대표들이 모여 MEDIA의 지원을 받으면서 자국영화에 대한 promotion활동을 공동으로 추진하고 있습니다.

이밖에도 많은 기구들이 거대한 조직과 예산(2003년도 100조 6,860억 유로)을 가진 EU라는 우산아래 활동하고 있습니다.

불행하게도 아시아지역에는 EU와 같은 기구가 없기 때문에 차선의 방법을 찾을 수밖에 없다고 생각합니다.

지난 10월 도쿄에서 개최된 <한 중 일 문화포럼>을 개방하고 확대하는 방안도 고려 될 수 있지만, 본인은 각국의 <문화장관회의>를 상설화해서 운영하는 방법이 보다 효과적이고 생각합니다.

지역간, 국가간의 문화(문화산업) 전반에 걸친 조정과 지원의 역할을 이 회의가 관장할 수 있을 것입니다.

'현재 세계차원에서 문화상품과 서비스의 교역과 유통의 불균형에 직면해, 모든 국가 특히 발전도상국과 전환기에 있는 국가들을 대상으로 국제협력과 연대를 강화해 국내, 외적으로 생존해 있고, 경쟁력 있는 문화산업을 육성할 필요가 있다.' (제10조) 고 규정하고 '문화다양성의 인식, 인류화합에 대항 자각 및 문화간 교류의 발전을 기반으로 한 연대를 소망' 한 유네스코문화다양성선언(2001년 파리총회 채택)을 상기한다면 상설 문화장관회의의 창설에 유네스코의 지원이 가능할 것으로 판단됩니다.

이와 함께 미디어와 문화산업에 종사하는 전문가들의 교육을 전담하는 아시아문화교육센터의 설립운영, 문화산업 Database의 구축과 문화정보센터의 설립, 공동제작을 위한 문화협정의 체결, 문화창조자의 권리보호 및 권익 신장 등 우리가 해결해야할 과제는 산적해 있습니다.

무엇보다도 Asia 각국간의 문화(산업)의 network와 미주 및 유럽과의 network를 상호 연결 또는 제휴하여 운영함도 시급한 과제라고 믿습니다.

끝으로 본인은 오늘 열리는 제1회 Global문화산업 포럼이 아시아문화(산업)의 Network를 구축하는 데에 커다란 전기가 되기를 기대하면서 이처럼 귀중한 자리를 마련해 주신 아시아문화산업교류재단 신현택 이사장과 관계자 여러분께 깊은 감사의 말씀을 드리고자합니다.

경청해 주셔서 감사합니다.

携手合作，促进亚洲文化产业的共同发展

——在第一届全球文化产业论坛上的演讲

高树勋

2004年11月24日

尊敬的申铉泽先生，尊敬的各位来宾：

首先，请允许我向申铉泽先生邀请我出席第一届全球文化产业论坛并发表演讲，向这次论坛的发起者——韩国亚洲文化产业交流基金会的热情接待，表示衷心的感谢，并为这次论坛的主旨：促进亚洲地区文化产业的交流与发展，建立亚洲文化产业界的关系网络，感到十分高兴。我相信这次论坛将使我们获得令人满意的收获，并结识许多文化产业界的朋友，这必将对我们发展本国及亚洲的文化产业起到积极的促进作用。

下面，我讲三个方面的问题。

一、关于文化产业的概念与定义

文化产业的概念，虽然出现于上个世纪中叶，但是真正成为学者研究和政府、文化界、企业界关注的对象，并在许多国家迅速发展起来，还是上世纪末一、二十年的事情。文化产业的形成与发展，在人类社会发展史上具有划时代的意义。因为，它以世

界和某个国家、地区发展的若干变化为重要标志：对于发达国家和部分经济发展较快的发展中国家来说，一是告别了工业化时代，已经进入或开始向知识化、信息化时代迈进；二是告别了城市化，开始向全球化迈进；三是经济发展使社会的物质基础大大增强；四是高新技术得到空前发展和广泛应用；五是随着恩格尔系数的逐步下降，社会公众对精神文化生活的需求日益上升；六是文化已经成为一个国家综合国力的重要组成部分。

具备上述前提，是文化产业形成与发展的必要条件。但是，由于文化产业的发展历史毕竟较短，所以，对于文化产业的概念至今众说纷纭，对它的内涵与外延也各执己见。有的把文化产业比喻为“朝阳产业”，有的定义为“内容产业”，有的称之为“知识经济”、“信息经济”，有的叫做“创造性产业”等等，当然，大多数国家似乎比较认可“文化产业”。我认为，对“文化产业”这一概念的定义，当初并不特别重要，东西方文化本身就存在较大差异，基于经济的、政治的、文化的不同理解与定义也是十分正常的，但是我们都能够明白无误地认识到，大家所说的是同一个问题。对文化产业范围的界定，也并不显得特别紧迫，现在世界各国对它的范围的界定也是各不相同，这是由于国情的不同所致。联合国教科文组织在《文化、贸易和全球化》的报告中给文化产业下了这样一个定义：“文化产业是指那些包含创作、生产、

销售‘内容’的产业。从本质上说它们与文化有关而且是不可触摸的，一般通过著作权来保护，并且以商品或服务的形态出现。

‘文化产业’通常被称为‘创造性产业’，但在不同的领域也有不同的称谓。在经济学术语里，它被称为‘朝阳产业’，在技术领域，它被视为‘内容产业’。文化产业一般包括印刷、出版、多媒体、视听、录音和电影制品、手工艺品和工艺设计等行业。在一些国家，这个概念还包括建筑、视觉和行为艺术、体育运动、乐器制造、广告和与文化有关的旅游业。”

教科文组织的这一定义，我认为是比较符合文化产业的内涵与外延的，可以和应当成为各国讨论的基础，随着时代和形势的发展，文化产业内容的变化和调整，也是必要的。

所谓“内容产业”的“内容”，是文化产业的灵魂，技术是文化产业的翅膀。“内容”无非是指文化产品和服务所包含的思想、观念、价值、知识、精神、情感等，它们浸透在一切文化产品和服务之中，大多通过娱乐的形式，带给消费者潜移默化的影响或精神上的愉悦与享受，只不过是表现形式的不同和程度的差异而已。因此，文化产品不同于一般的物质产品，所以法国在1993年关贸总协定乌拉圭回合的最后谈判中，提出了“文化例外”的原则，得到了大多数世贸组织成员国的赞同。对于广大发展中国家来说，如何维护文化多样性，保护本国的民族文化，使

其成为促进发展的宝贵财富和精神动力，是当前面临的共同问题。

无论如何，在人们为文化产业的概念与定义争论不休时，文化产业已经在许多国家蓬勃发展起来，而且正在为本国的国民经济做出越来越大的贡献，也为大众带来了丰富的精神文化生活。因此，人们不应从概念出发，而首先应从实际出发，加快文化产业的发展。

二、关于中国文化产业的发展与对策

中国自改革开放以来的 20 多年中，经济发展和现代化建设取得了举世瞩目的成就，中国的市场经济体制已经建立并正在完善。到 2003 年，国内生产总值已达 11.73 万亿元人民币。人均 GDP1000 美元，这标志着中国的发展已到了一个关键时期。本世纪初的二十年，中国将全面建设惠及十三亿人口的小康社会。当人们的物质生活需求得到基本满足以后，就会更加注重生活质量的提高和人的全面发展。发展文化产业是满足人的多样性、多层次精神文化需求的重要渠道。2001 年，中国城乡居民直接用于文化消费的支出为 4555 亿元人民币，2002 年为 5000 亿元，2003 年 5830 亿元，而今年则可能超过 6500 亿元，即每年将以大约 500 亿元的速度递增。中国巨大的市场使文化产业发展具有极大的潜力和广阔的空间。

因此，中国在改革开放以后，特别是近十几年来，越来越重视文化产业的发展，对发展文化产业的要求也在逐步改变，从“发展相关文化产业”到“积极发展文化产业”，再到“促进文化产业的快速发展”，都充分说明了中国对文化产业的重视程度不断提高。一方面，我们认为通过发展文化产业，可以为推进经济发展和现代化建设提供精神动力和智力支持。另一方面，文化产业本身也是国民经济的重要组成部分，是一个新的经济增长点，可以为国民经济做出越来越大的贡献。在具备一定条件的基础上，“朝阳产业”可以迅速成长为“支柱产业”或“主导产业”。

目前，中国的文化产业已初具规模，文化市场体系正在构建，以国有为主体、多种所有制共同发展的格局正在形成，文化产业政策正在逐步完善，在某些领域，如网络游戏、移动通讯等，发展更为迅速。目前中国的网络游戏人数已超过 4000 万人，年产值约 10 亿元，并以每年近 50% 的速度增长。到 2003 年，我国的移动电话用户已达 2.7 亿户，2002 年中国国内短信发送量为 750 亿条，以每条 0.1 元计算，就有 75 亿元的收入。

2002 年，中国在出版方面的年产值为 994 亿元，广告 903 亿元，娱乐 224 亿元，广播影视 176 亿元，报刊 117 亿元，音像 25 亿元，电影 10 亿元，这七大行业的年产值共为 2449 亿元，约占当年国内生产总值 10.6 万亿元的 2.4%（其中广播电视和

报刊业未包括广告收入，以避免与广告业重复计算。2002 年广播电视业的广告营业额为 254 亿元，报刊业为 203 亿元)。如果加上旅游、体育、演出、网络文化等，文化产业的产值就可与城乡居民的文化消费支出总额大致相对应了。2002 年，中国的旅游产值 5566 亿元，体育 184 亿元，演出 8 亿元，网络传媒 5 亿元，共计 5763 亿元。

如前所述，世界各国对文化产业的范围并无统一的界定，这当然有赖于产业的发展而逐步统一或相对对应；而另一方面，它也失去了一定的可比性，或者说是为各国进行文化产业规模和产值的对比造成了一定的困难。对此，中国有关部门对建立文化产业统计指标体系进行了研究，并初步测算了文化及相关产业增加值的有关数据，即 2003 年，中国的文化及相关产业实现增加值 3577 亿元，占当年 GDP 的 3.1%。我们把文化产业分为核心层、外围层和相关层三个层次。核心层，以传统意义上的文化产业为主，包括新闻出版、发行、版权、广播电影电视、文化艺术等，实现增加值 884 亿元。外围层，即以改革开放以后发展起来的文化产业为主，包括网络文化服务、文化休闲娱乐和其他文化服务等，实现增加值 835 亿元。相关层，即相关文化服务，包括文化用品、设备及相关文化产品的生产和销售等，实现增加值 1858 亿元。当然，这与 2002 年的统计口径与方法也有较大的不同，需

要逐步规范和统一。

统计结果表明，中国文化产业从业人员占全部从业人员的比重与其对国民经济的贡献相比相对较低，同时也说明中国文化产业的发展存在较大的空间。中国正在进行第一次全国经济普查，届时，将对有关数据进行验证，并将有一个更加全面和权威的统计。

当前中国文化产业面临的主要问题是：文化产业还没有完全适应市场经济体制的要求，总量较小，质量较低；结构调整不力，部门分割、行业垄断和地区封锁现象还比较严重；文化企业竞争能力较弱，创新能力不强，文化产品科技含量不高；文化产业政策不完善，立法层次低；文化企业经营管理人才和科技人才缺乏。

为了解决这些问题，我们制定了相关措施，一是研究制定文化产业总体规划，把文化产业纳入国家整体发展战略；二是推动经营性的文化单位转企改制，塑造大批新型的市场主体；三是积极整合文化资源，大力推动战略性结构调整；四是逐步放宽市场准入政策，不断拓宽投融资渠道；五是大力推进文化创新，鼓励原创产品的创作、生产、开发和利用；六是努力提升文化产业的科技含量，注重引进和利用高新技术，尽快提升文化产业的科技含量；七是大力实施“走出去”战略，鼓励文化企业开拓国

际市场；八是扶持重点文化产业项目的发展，使其在各领域起到示范性作用；九是加强人才培养，特别是各类创新人才的培养和使用；十是加快完善文化产业法规建设，切实加强知识产权保护，为文化产业发展创造良好的市场环境和贸易环境。

其中，最为重要而紧迫的任务就是第二条。大家知道，中国的文化事业单位是在过去长期计划经济条件下形成的，主要是依靠政府拨款来完成公益文化服务，其中存在大量可以经营的文化单位，现在仍然保留着事业体制，这是发展文化产业的最大体制性障碍。当前，随着市场经济体制的建立，这类经营性的文化单位应当转企改制，面向市场，增强活力。然而，人们在就业的思想观念，工作的方式方法上都还一时难以适应市场经济的要求，不少文化单位陷于生存状况堪忧的困境。所以，我们正在通过试点，逐步加大转企改制力度，促使文化事业单位转为企业，同时给予一定的政策支持，使他们轻装走向市场，寻求更大的发展。

三、关于亚洲文化产业的交流与合作

亚洲国家山水相连，人种、肤色大致相同，文化差异相对较小。经济互补、政治互信、文化互学，在发展文化产业上有更多的交流机会和更大的合作潜力。“中日韩文化产业论坛”，我们今天的“全球文化产业论坛”，以及各种文化方面的双边、多边国际会议，都为发展文化产业的交流与合作提供了平台。

在亚洲的文化产业发展中，韩国、日本都在很多领域创造了世人瞩目的成绩。

韩国把政府战略与企业发展相结合，使文化产业为扭转经济形势作出了巨大贡献。在经济恢复过程中，文化产业最为活跃，成长最快。韩国经济在 1997 年后一度陷于低谷，但短短两三年又重新崛起，1999 年经济增长回升至 10% 左右。近年来亚洲许多国家风行文化“韩流”，韩国成为公认的文化出口新兴国家。1995 年，韩国电影出口仅为 21 万美元，到 2001 年达 1100 多万美元，增长 50 倍，2003 年 6 月一个月上映的影片就多达 36 部。韩国三大电视公司之一的 MBC，2002 年 6 月就在上海电视节上卖出了 100 多万美元的片子，而五年前在上海才卖出 5 万美元。

韩国及时调整文化产业战略，加速了文化产业发展。1997 年就设立了“文化产业基金”，为新创文化企业提供贷款。金融危机之后韩国许多部门都在裁减，只有文化部门不减反增。1998 年成立了文化产业局。在这一点上，中韩两国十分相似。1998 年，中国政府大幅度精简机构，公务员裁减 50%，而中国文化部却在此时增设了文化产业司。1999 年韩国国会通过了“文化产业促进法”，1998 年成立了游戏产业振兴中心，2001 年又成立了文化产业振兴学院，每年可得到政府大量资助。为了促进文化产品出口，政府还特别成立影音分轨公司，对韩文的外语翻译和制作几

乎全额补助。为保护崛起中的韩国电影，政府通过强制手段，保证韩国电影在上映档期上的配额。并给予专门发行放映国产电影的发行公司和影院以税收上的优惠，这些政策将持续到国产电影的市场占有率达到 40%。为此政府每年拨出巨额经费，重点支持 20 部国产电影的拍摄，并规定影院每年放映国产电影不得少于 126 天。为家用电脑开发设计的网络游戏，由于被确定为韩国的国家战略性支柱产业，自 1998 年的 5 亿美元增加到 2001 年的 11.6 亿美元，产值翻了 1.3 倍多。其中“天堂”游戏最突出，不仅风靡亚洲，而且与微软和索尼在游戏产品市场形成鼎足之势。网络游戏产业的崛起，使韩国的宽带网络普及率在世界上遥遥领先，还直接促进了电子商务在其他领域的发展，一种新的、注重设计的创新文化渗透到各个产业，逐渐把“韩国制造”推向“韩国创作”。

日本走“产、官、学”相结合的道路发展文化产业，取得显著成效。索尼公司的传统产品严重亏损，但所属的索尼电脑娱乐公司、音乐公司和影视公司却不断盈利，使索尼公司保持了增长势头，它不再是传统意义上的电子设备生产企业，而是一个以文化产业为核心的综合性企业。日本的文化产业属于“大文化”概念，体系较为完整，已成为仅次于制造业的第二大支柱产业。

此外，新加坡、印度等国在发展文化产业方面也有许多有益

的经验。

总之，亚洲国家在发展文化产业方面的交流与合作应当采取多种形式，开拓更多的渠道。我认为，对于中国来说，这种交流与合作需要从以下几个方面进行：

1. 政府、企业和研究机构之间建立定期和不定期的交流机制。
2. 在人才培养方面开展合作。
3. 在创意、技术和管理方面加强交流。
4. 在投资、合作经营方面进行探索和尝试。
5. 在政策法规的研究制定方面互相学习和借鉴。
6. 加强互惠互利的文化贸易。

最后，我祝愿论坛取得圆满成功。

我的演讲到此结束，谢谢主席先生，谢谢大家。

The Speech in the 1st Global Culture Industry Forum

Promotion of Asian Culture Industry Development with Cooperation

Gao Shuxun

2004.11.24

Dear Mr Shin, hyun-taik, Ladies and Gentlemen:

Firstly, I would like to extend my gratitude to Mr Shin,hyun-taik who invited me to present at the 1st Global Culture Industry Forum and to give a speech. I also would like to extend my gratitude to Korean Asia Culture Industry Fund for their warm entertaining. I am delight with the theme of this forum: to promote the communication and development of Asia and to build the network of Asian culture industry. I believe this forum will give us satisfying harvest. We will meet a lot of friends of culture industry. And it will bring positive promotion for us to develop the culture industry of our country and the whole Asia.

My speech is divided into three parts:

I About the conception and definition of Culture Industry

Though the conception of culture industry existed in the middle of 20th century, it was in the last 10-20 years of 20th century that it really became the focus of scholars' research and government, culture circles and business organizations. Meanwhile it developed rapidly in a lot of countries. The formation and development of culture industry had significant meaning in the history of human society development.

Because it took the change of the world and a certain country or area's development as important symbols. To developed countries and some developing countries whose economy developed rapidly:

1. Entering the new era of information and knowledge from industrialization
2. Entering globalization from urbanization
3. The development of Economy has strengthened the material foundation
4. The science technology has developed and been used in a infrequently rapid speed
5. With the step down of Engel's coefficient, public's desire of culture life moved up rapidly
6. Culture has been an important part of the national power

These presuppositions are necessary conditions of culture industry's formation and development. But since the history of culture industry is a little short, the definition of culture industry is still unclear. And people have different ideas with its connotation and extension. Some called it 'rising industry', some defined it as 'content industry', some called it "economy of knowledge", "economy of information" and "creative industry", etc. Certainly most countries seem to prefer "culture industry".

My opinion is that the definition of 'culture industry' is not especially important at beginning. There are obvious differences between oriental and western culture themselves. It is very natural that they have different understanding and definition in economy, politic and culture. But we could realize with no doubt that what we are discussing is the same issue. It is also not very urgent that to range the limit the range of culture industry. Now each country has its own definition of its range because of different situation. UNESCO has done a definition in its report <culture, trade and globalization>: "culture refers to that industry including creation, manufactory and sale contents. Basically it is related with culture and untouchable. It is protected with copyright and appears as the shape of product or service. Generally 'culture industry' is called 'creative industry', but it has different names in different fields. In glossary of economy it is called 'rising industry', in glossary of technology it is called 'content industry'. Culture industry generally includes printing, publishing, multimedia, audio, recording and motion pictures, handiwork and art design industry, etc. In some countries this conception includes architecture, vision, sports, musical instrument manufacture, advertising and tourism about civilization. "

My opinion is that is that the definition of UNESCO agree with the intension and

extension. It could and should be the base of each country's discussion. With the developing of age and position, the change and adjustment of culture industry will be essential.

The 'content' of so-called 'content industry' is the soul of culture industry and technology is the wing of culture industry. 'Content' refers to the thought, conception, knowledge, spirit and emotion which culture products and service contain. They are contained in all the culture products and service, and most of them bring invisible effect or mental joy in the form of entertainment. It only has difference in the ways of performance and degree. So culture products are different with common material products. France put forward the principle that 'culture is exception' in the final negotiation of Uruguay term of GATT in 1993. And it won the agreement of most countries of WTO. Currently the same issue of developing countries is how to protect the diversity of culture, protect own folk culture and make it to become the rare treasure and spirit to promote the development.

In any cases, when people are arguing about the conception and definition of culture industry, it has already been developing healthily in a lot of countries and made more and more contribution to the country's national economy. Meanwhile it bring rich culture life to public. So people should quicken the development of culture originating from practice instead of conception.

II About the Development and Strategy of Chinese Culture Industry

Since more than 20 years of opening reform, China has distinguishing achievements in economic development and construction of modernization. In China, the system of marketing economy has been built and being completed. In 2003, GDP reached 1,173 billion RMB and 1,000 USD a person. It indicated that China's development had entered a key period. In the first two decades of this century, China will set up a welfare society which bring profit to 1.3 billion population. When people's material demand are satisfied basically, they will pay more attention to enhance the quality of life and

development. Developing culture industry is an important method to meet peoples' demand of various and multi-level mental culture. In 2001, the citizens of country and town in China paid 455.5 billion RMB to their culture consume, this totality in 2002 was 500 billion, and in 2003 was 583 billion. In this year the totality will possibly be more than 650 billion RMB. It has been increased by 50 billion each year. China's huge market brings culture industry great potential and vast space.

Therefore, after opening reform especially the current 10 years, China pays more and more attention to the development of culture industry. From 'to develop related culture industry' to 'to develop culture industry actively' to 'promote the rapid development of culture industry', these slogans indicated that the degree of China's recognition to culture industry has been enhanced. On one hand we think we could provide spirit power and intellectual support to the promotion of economic development and modernization construction. On the other hand, culture industry itself is an important part of national economy. It is a new increasing point of economy. It could make more and more contribution to national economy. When being provided with certain conditions, the 'rising industry' could be 'mainstay industry' or 'leading industry'.

Currently, China's culture industry has rudimentary shape. The system of culture market is under construction. A structure whose main body is state-owned industry is in process of forming. And the policy of culture industry is completed step by step. In some fields such as internet games, mobile communication, the development has more rapid speed. Now China has more than 4 million population of internet game. This industry has 1 billion earnings each year, and it is increasing by about 50%. By 2003, there are 270 million cell phones users in China. In 2002 the totality of SMS was 75 billion. It is 7.5 billion RMB earnings by 0.1 each. In 2002, China had 99.4 billion production value in press, 90.3 billion in advertising, 22.4 billion in entertainment, 17.6 billion in radio and TV, 11.7 billion in newspaper and magazines, 2.5 billion in audio, 1 billion in movies. These seven industries took 2.4% in GDP whose totality was 10,600 billion.(the industry of video &TV and industry of newspaper&magazines don't include advertising earnings to avoid

overlapping). If tourism, sports, performance and net culture are added, the production value could be the same as citizens' culture consumption. In 2002, the production value of tourism was 556.6 billion, sports was 18.4 billion, performance was 80 million, net communication was 50 million, the total was 576.3 billion.

As I said, the countries in the world don't have a consistent definition of the range of culture industry. This will depend on the development of industry. On the other hand, it loses comparison basis, or it brings each country difficulty in comparing the scale of culture industry with production value. Therefore, China's related department has done research on the accounting system of culture industry, and counts roughly the data of culture industry and its related industry. In 2003, China's culture industry and its related industry had an increased value of 357.7 billion, which took 3.1% of GDP. We divided culture industry into three layers which are core layer, periphery layer and related layer. The traditional culture industry is the main body of the core layer, including news press, publication, video & TV and arts. The extra value is 88.4 billion. The main body of the periphery layer is those culture industries which developed after opening reform, including internet culture service, culture entertainment and other culture service. The increased value is 83.5 billion. The related layer is those related culture services, including the manufacture and sales of stationeries and equipment. The increased value is 185.8 billion. Certainly, the method and range of this research is much more different with the one of 2002. We need to be standard and consistent step by step.

The accounting result indicates that compared with contribution that the employees of Chinese culture industry do to GDP, their proportion in all Chinese employees is low. This indicates that the development of Chinese culture industry has large space. China is doing the first national economic census, at that time, the related data will be validated and a more standard accounting will be achieved.

The main issues that Chinese culture industry is facing now are:

1. The culture industry has not adapted the requirement of market economy system completely now. The total is little and the quality is low.

2. The adjustment of structure is not effective enough. The communication among culture departments is still too weak. The problem of industry monopolization and region blockage is serious.
3. The competitive potential and innovation of industry enterprises are too weak. And science hasn't taken a large proportion in culture productions.
4. The policy of culture industry has not been completed.
5. The culture enterprises are in short of managing and scientific talents.

To solve these problems, we have made some measures.

1. To make the total development layout of culture industry after research and put it into the national development strategy
2. To promote commercial culture department to be corporations. Therefore a lot of new-style main body of the market will be set up.
3. To recombine the culture resource actively and push strategical adjustment to the structure
4. To relax the entering policy of the market step by step and broaden the channel of financing
5. To push the culture innovation and encourage the creation, manufacturing, exploitation and use of culture products
6. To try hard to develop the science of culture industry. To concentrate on importing and using new science technology
7. To encourage the culture corporations to develop international market
8. To support the development of those key culture projects and make them to be models for others
9. To focus on educating professional talents
10. To quicken the pace of complete the culture industry policy. To protect the copyright and to create a good market and trade environment.

Among them, the most important and urgent task is the second issue. As we all know, the culture departments in China are completed by the long-term planned economy. The culture service primarily depends on appropriate funds from government. Lots of them still existed and keep the former system, which is the biggest obstacle to develop culture industry. Now, these culture departments should turn to corporations and to meet the need of market. Many culture departments run badly. Therefore, through experimental units, we gradually turn them to corporation, give some policy support to them to make them face to markets easily and look for further development.

III About the communication and Cooperation in Asia's Cultural Industry

Asian countries have related borderlines. People there and their skin colors are almost the same which leads to slim differences in culture. They help each other in the economy, believe others' policy and learn from each other in culture area. So there would be more opportunities for communication and more potential cooperation. The China-Japan-Korea Cultural Industry Forum, the Global Cultural Industry Forum and other kinds of bilateral and multi international conferences on culture set a platform for the communication and cooperation to develop the culture industry.

In Asia's development of culture industry, Korea and Japan made great and outstanding progress in many fields.

Korean combines its government strategy and enterprises development together, making cultural industry a great contribution to change its economic state. In the process to recover in economy, the culture industry was the most active part and developed most rapidly. Economy of Korea used to stay in a valley in 1997, but it rose up again in just a couple of years and in 1999, it has risen at the rate of about 10%. In the recent years, Korea Trend has been popular in many Asian countries and Korea has been considered as a new country to output its culture. In 1995, the movie income for export was only \$210,000 but in 2001 that figure reached \$11,000,000, 49 times more than the previous one. In June,

2003, as many as 36 movies were on show in just 30 days. MBC, one of the three biggest video companies in Korea, took in an movie income of more than \$1,000,000 in the Shanghai Movie Festival in 2002, compared with which was only \$50,000 five years ago.

South Korea combined government strategy and company development, which helped cultural industry contribute to the up-turn of economy. During the period of economy recovering, cultural industry was the most dynamite and grew fastest. After 1997, South Korean economy plummeted; yet, shortly within three years, the economy boosted again, and gained 10% growth in 1999. Recently, "Korean-Storm" hit nearly all the Asian countries. South Korea also became widely recognized as leading country in cultural export. In 1995, South Korean film industry export was only 210,000USD. By 2001, it rocketed up to 1.1million USD, grown by fifty times. In June 2003, for one month, more than 36 films came out to audiences. MBC, one the Big-Three of Korean TV production companies, sold over 1million USD worth products during 2002 Shanghai TV Festival. Five years ago, it merely made 50,000USD in Shanghai.

South Korea adjusted its cultural industry strategy timely, which speeded up the industry's development. In 1997, the country established Fund of Cultural Industry, which offered loans to new cultural companies. After financial crisis, in spite of deduction in many departments around the country, cultural departments maintained growth. And in 1998, Cultural Industry Bureau was founded. From this perspective, China shares lots of similarities with South Korea. In 1998, China had a huge political institute shrinkage and cut off half officers. However, Ministry of Culture started a new cultural industry department. In 1998, South Korean parliament passed Law of cultural industry enhancement. And also game industry center was built in 1998. In 2001, cultural industry college established, which benefited large amount of financial support from the government. To further cultural products export, South Korean government particularly opened a audio-video dubbing company, which enjoyed full compensation from government in foreign language translation from Korean.

To protect the booming Korean films, the government enforced its order of certain numbers of Korean film in premieres and theatres, and also gave tax discounts to production companies and theatres that specially played Korean-made films. These policies would continue by the time domestic-made films acquired 40% of market shares. The government every year would spend large amount of its budget to support the production of twenty selected domestic made films. And the government ordered theaters to play no less than 126 days of domestic made films per year.

Internet games designed for home PC has been entitled as the column industry in South Korean national strategy. The market value of Internet games increased over 130%, from 500million USD in 1998 to 1.16billion USD in 2001. "Heaven", was the most outstanding, which not only hit over Asia, but ran neck to neck with Microsoft and SONY games. The boost of South Korean Internet games helped the popularization of household broadband ahead of other countries in the world, and directly pushed forward the development of electronic business in other areas as well. A new innovative cultural, which highlights design, entered every industry, and gradually switch "Korea-made" to "Korea-created".

Japan already made obvious success, leading on the road in its cultural industry development, combining industry, management and education together. Traditional products put SONY Corp in heavy deficit; but, SONY companies in computer entertainment, music and movie industry has been gaining profits continuously, which keeps SONY Corp's trend growing. SONY Corp. is no more a traditional electronics manufacturer; but, a multi-complex with a cultural industry chip. The cultural industry of Japan defines to the concept of "Big-Culture", and boasting fairly complete system, which already is the second column industry of the country, only behind the whole manufacture industry.

Besides of Japan, Singapore, India and others has a lot of precious experience in cultural industry development.

In summary, Asian countries need to apply various ways in exchange and cooperation

of cultural industry development. In my point of view, for China, the exchange and cooperation need to begin in following areas:

1. systematic exchange among government, companies and institutes based on fix or unfixed terms;
2. cooperation in training;
3. strengthen exchange in innovation, technology and management;
4. exploration in investment, cooperative management;
5. mutual learning and understanding in setting and research of policy and regulation;
6. further-up cultural trade based on mutual benefits.

Last but not least, I wish the Forum success!

That's all for my speech. Thanks a lot to Mr Chairman and all of you !

EURIMAGES

Council of Europe / Conseil de l'Europe

Regulations 2004

Seoul, November 24, 2004

*Speaker:
Elisabeth Rohmer
Deputy Executive Secretary*

Council of Europe
46 Member States



COUNCIL OF EUROPE / CONSEIL DE L'EUROPE

EURIMAGES

Council of Europe / Conseil de l'Europe

European Union



25 Member States

**MEDIA
2007**

MEDIA

Outline of Presentation



1. Overview
2. Co-production Support Scheme

1. Who we are, an overview



- Support for European Co-productions
- Partial Agreement of the Council of Europe
- Complementary to the MEDIA Programme

Member States



- **Currently 30 European Member States:**
AT, BE, BG, CY, CZ, DK, FI, FR, DE, GR, HR, HU,
IS, IE, IT, LV, LU, NL, NO, PL, PT, RO, SK, SI, ES,
ET, SE, CH, TR, FYROM
UK is not a member of Eurimages since 1998

Budget



- Annual Budget: 20M € (~ 90% => co-production support)
- Source : member states' contributions
reimbursement
voluntary contributions



2. Co-production Support Scheme

Our objectives



- To promote the film industry in Europe by fostering and encouraging creative, technical and financial cooperation between professionals of different European countries
- To increase the circulation of European films in Europe
- To access different sources of financing in the coproduction countries
- To decrease the Co-producers own investment and their risk
- To close the financing gap

Films Supported



Nearly **1000** European co-productions supported since 1989
for a total amount of **284 599 652€**.

Examples: (complete listing cf. <http://www.coe.int/eurimages/>)

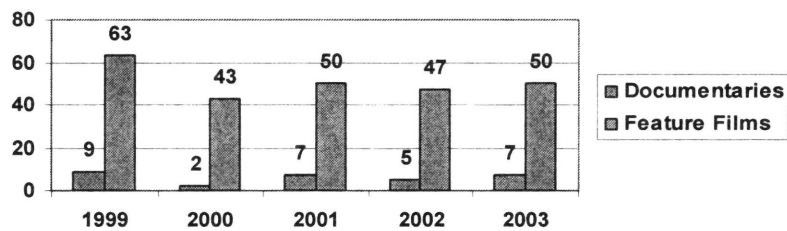
<i>Manderlay</i>	DK/SE/FR/NL/DE/GB
Lars von Trier	725 000€
<i>Karaula</i>	HR/SI/MK/BA
Rajko Grlic	200 000 €
<i>La Finestra di fronte</i>	
IT/PT/TR/GB	
Ferzan Ozpetek	400 000 €
<i>Vodka Lemon</i>	FR/CH/IT/Armenie
Hiner Salem	234 000€

<i>Tulse Luper Suitcases</i>	
NL/IT/ES/HU/LU/GB	
Peter Greenaway	550 000€
<i>Trilogie 1</i>	GR/FR/IT
Theo Angelopoulos	600 000€
<i>Mar Adentro</i>	ES/FR/IT
Alejandro Amenabar	750 000€

Statistics



Feature films and documentaries supported (1999- 2003)



Summary of Key Eligibility Criteria



- Fiction, Animation and Documentaries min. 70' intended for cinema release
- European director (1st time directors possible)
- Project must be European in terms of origin/culture, financing and rights and must originate from within an Eurimages Member State
- Co-production between min. 2 Eurimages Member States
- Co-production percentages: Max 80% and Min. 10%
- Start of principal photography max. 6 months after the support decision
- Excluded content: no pornography, promotion of violence or violation of human rights

European Convention



Calculation of European Elements according to the European Convention on Cinematographic Co-production (ETS 147):

Creative group (7pts)		Performing group(6pts)		Technical group (6pts)	
Director	3 pts	First role	3 pts	Cameraman	1 pt
Scriptwriter	3 pts	Second role	2 pts	Sound recordist	1 pt
Composer	1 pt	Third role	1 pt	Editor	1 pt
				Art Director	1 pt
				Studio/location	1 pt
				Post-prod.	1 pt

Full-text cf. <http://conventions.coe.int/Treaty/en/Treaties/Html/147.htm>

Ratifications, explanatory report etc. <http://conventions.coe.int/Treaty/Commun/ListeTraites.asp>

European Origin



- European: Director (by nationality or permanent residence) – Geographical Europe (→ COE: 46 Member States)
- Project must “originate” in Eurimages Member states
- 15 / 19 points according to the European Convention on Cinematographic Co-production
- European co-producers: majority European shareholders required

Support Awarded



Feature Films, Animation, Documentaries

- ✓ Budgets above 1.5 M€ Max. 15% of the total production cost
- ✓ Budgets below 1.5 M€ Max. 20% of total production cost
- ✓ For all projects: up to 700 000€

Allocation of EURIMAGES support between co-producers

- ✓ Generally proportionally between producers from Eurimages member states
- ✓ Possible exceptions for producers from "small" Eurimages member states
- ✓ No allocation of support to co-producers from non-Eurimages Member States

Required Participation



• Minimum participation of each co-producer:

- Bilateral co-production:
 - **Majority co-producer:**
 - max: 80%
 - max: 90% (Budget > 5 M €)
 - **Minority co-producer:**
 - min: 20%
 - max: 10% (Budget > 5 M €)
- Multilateral co-productions:
 - **Majority co-producer:**
 - max: 80%
 - **Minority co-producers:**
 - min: 10%

Financial requirements



- Eurimages => Top-financing
- 50% confirmed financing threshold for all co-producers, including non-Eurimages Member State co-producers
- Third Party Financing: national support and/or presale/MG required in each co-production country
- 51% of the financing must originate from EURIMAGES Member State financiers
- No outstanding debt vis-à-vis EURIMAGES

Technical and artistic co-operation / Financial Co-productions



- Technical and/or artistic co-operation
 - Requirements and assessment by EURIMAGES
 - Min. between two co-producers from different EURIMAGES' member States
 - Requirements by co-production treaties
- Financial co-productions
 - Only on condition that national recognition can be obtained

Decision making flow chart



- Producers send applications to the Secretariat (by the deadline)
- Secretariat assess the applications (Verification of eligibility criteria and analysis by the Secretariat)
 - Additional inquiries
 - Confirmation of financing threshold
- The Board of Management takes decision

Support decision by the Board of Management



- New selection criteria
 - Artistic merits of the project
 - The experience of the director, of the producers, of the artistic (authors, casting, etc.) and technical teams
 - The circulation potential of the project
 - The commercial potential of the project
 - The artistic and/or technical co-operation between the co-producers
 - The overall level of confirmed financing for the project
 - ! No order of priority ! !Special attention for feature films for children!
- Co-production working group
 - Detailed assessment of the projects
 - Recommendations: priority, possible and non-priority
 - Rotating composition of 6 Members of the Eurimages Board
- Voting Procedure of the Board of Management

Contact:



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Email: eurimages@coe.int

Website: <http://www.coe.int/Eurimages>



ANNEX A: Distribution Support Scheme

Complementary to the MEDIA + Distribution



Who can apply?

- * Independent distributors with head office:
- * in EURIMAGES member states; and
- not in country of origin of film (i.e. of all co-producers of the film)

Depending of origin of distributor:

A. EURIMAGES Member States Non-member of the MEDIA PLUS-Programme, namely, Croatia, Romania, Switzerland, FYROM and Turkey

→ Support for all eligible films

B. All Eurimages Member States:

- Distribution of feature films from non-MEDIA PLUS member states
- Children's films or documentaries for cinema release

Films eligible for Distribution Support



- Full length feature films: Fiction, Animation, Documentaries (min. 70')
- From EURIMAGES member states:
 - National production from one Eurimages member state
 - If a Co-production: then more than 50% of financing by co-producers from Eurimages member states
- European director
- European film (19 pts of European Convention)
- Excluded content:
 - blatantly pornographic nature
 - promotion of violence
 - open incitation to a violation of human rights
- Synergies with co-production support

Application Process



- Same deadlines as co-production
- Distribution Working Group selects the films
- Possibility to re-apply once, if rejected
- Distribution budget (max. Support 8000€ and max. 50% of total budget)
- See <http://www.coe.int/Eurimages/> for more info



ANNEX B: Cinema Support Scheme

Cinema Support

Objective: to increase programming of European films in Eurimages member states' cinemas



Cinemas concerned:

- In EURIMAGES member states without access to the MEDIA Programme
- Commercial cinemas (min. 6 months per yr)
- Min. weekly screenings: 10 . Min. number of seats: 50
- Technical equipment with professional standards
- Safety requirements in accordance with national legislation
- No pornographic cinemas

Commitment of cinemas:

- Min. 33% of the European films in programme
- Min. 50% of screenings are European films

Annual support

Max. 1st year: 21.000 €

Max. thereafter: 19.000 €

Cinema Support



• 30 Cinemas in the Network in 2004

• Application:

- to be sent to Eurimages
- Transmitted to Europa Cinemas (<http://www.europa-cinemas.org>) for technical evaluation
- Deadline by 30 September for support in following year

• Decision:

- Board of Management (working group) based on a visit report

After Support Decision



- **Support decision valid for 6 months**
- **Support agreement: aim to ensure finalisation of on 1st day of principal photography**
- **Reimbursement**
 - Pro rata recoupment corridor in 1st position
 - Deductions now established at completion/answer print

New payment structure



- **Facilitates the cash-flow situation of the producers**
- **Three instalments:**
 - 60% Support agreement
 - 20% Answer print and Approval of draft credits
 - 20% Certified accounts & confirmation of release in all co-production countries

大眾音樂

Pop Music

著作権ビジネスの現状
The present condition of Copyright Business

社団法人 音楽出版社協会 Music Publishers Association of Japan
常務理事 Executive Director
谷口 元 Haji Taniguchi

① 日本の音楽市場の現状。

CDの売上は1998年をピークに、以降減少し続けている。
1998年以降5年間で35%の減少。

② 著作権使用料の推移

CD衰退に関らず、日本音楽著作権協会（JASRAC）の徴収額は
ほぼ横ばい — 微増で推移している状況である。
大きな録音権収入の減少を補う要素は一体何なのか？

要因1）インタラクティブ収入（ノン・パッケージ展開）：－

「着メロ」、「着うた」の流行、普及。
音楽配信の問題。
「着うたフル」の実現と将来性。

要因2）改正・改革が新たな収入元を：－

演奏権使用料率の改正など。
違法コピー排除の為の啓蒙。

要因3）外国曲の現状：－

韓流＝韓国楽曲の流行。韓国文化の紹介。
JASRAC＝KOMCA間 相互管理契約の締結実現へ。
権利者としての意識の向上。

③ まとめ

저작권 비즈니스의 현황
The present condition of Copyright Business

사단법인 음악출판사협회 Music Publishers Association of Japan
상무이사 Executive Director
다니구치 하지메 Haji Taniguchi

① Conditions of Japanese record market

CD sales are dwindling after reaching its peak in 1998.
Decrease of 35% during the 5 years following 1998.

② Development of copyright usage expenses

Despite the drop in CD sales, almost no shift in the amount collected by JASRAC – recent developments show a slight increase

Then what is the substitute that can supplement the huge profit decrease in recording rights?

Factor 1) Two-way profit (Non-package development) : –

Trend-setting and distributing ‘melody transmission’ and ‘music transmission’.

The issue of music distribution.

The realization and prospects of ‘Chacoouta Full(mobile music transmission service)’

Factor 2) The onset of new source of profits through reform/revolution:

Reform rates of usage expenses for performing rights

Enlightenment to assist the rejection of pirated products

Factor 3) Trends of foreign songs:

Korean Wave = popularization of Korea music. Introduction of Korean culture.

With the closing of a mutual management agreement between JASRAC and KOMCA, greater awareness as a rights-holder will be cultivated

③ Conclusion

저작권 비즈니스의 현황
The present condition of Copyright Business

사단법인 음악출판사협회 Music Publishers Association of Japan
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다니구치 하지메 Haji Taniguchi

① 일본 음악시장의 현황

CD 매출은 1998 년을 정점으로 감소세를 보이고 있다.
1998 년 이후 5 년간 35% 감소

② 저작권사용료의 추이

CD 매출감소에도 불구하고 일본음악저작권협회(JASRAC)의 징수액은 거의 변동 없음 — 다소 증가 추이를 보이는 상황
엄청난 녹음권 수입감소를 보충할 요소는 대체 무엇인가?

요인 1) 쌍방향 수입 (Non-package 전개) : —

‘착신멜로디’, ‘착신음악’의 유행, 보급.
음악 배포의 문제.
‘차쿠우타폴(착신음악 full, 모바일 음악전송서비스)’의 실현과 장래성.

요인 2) 개정·개혁이 새로운 수입원을 : —

연주권 사용요율의 개정 등
불법복제 배격을 위한 계몽

요인 3) 외국곡의 현황 : —

한류=한국음악 유행. 한국문화의 소개.
JASRAC =KOMCA 간 상호관리계약 체결 실현으로.
권리자로서의 의식 향상

③ 정리

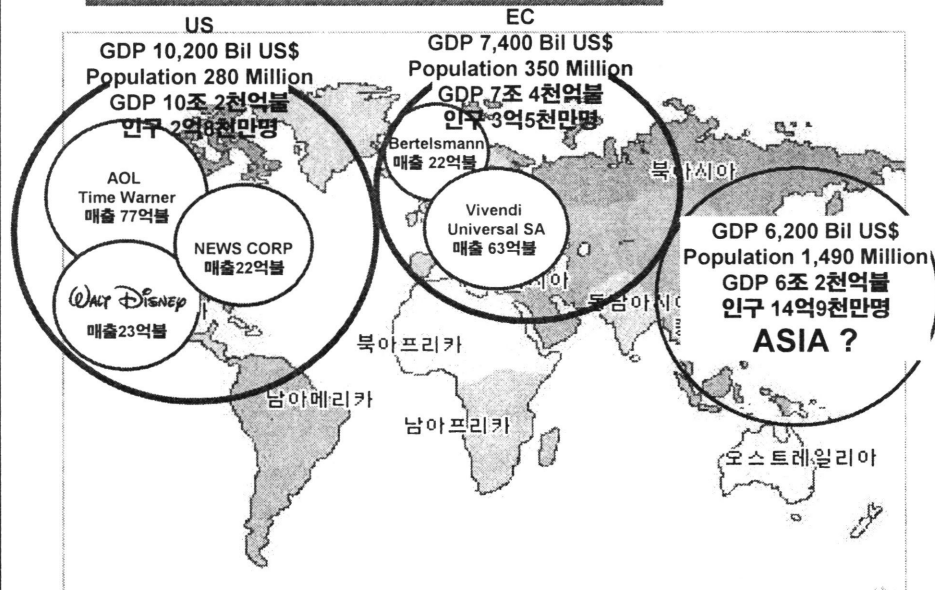
One Asia, One Culture

Lee, Soo Man
Chairman / Producer
S.M. Entertainment

2004. 11.24.

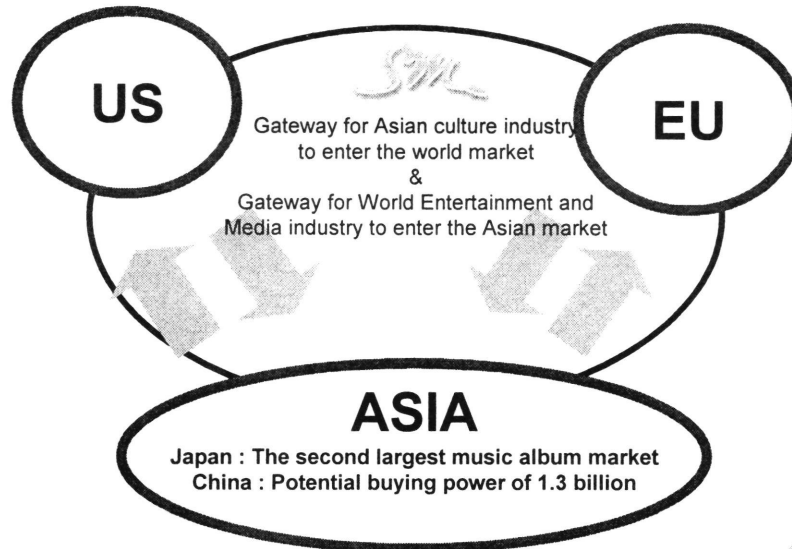
SM

GLOBAL MEDIA GROUP



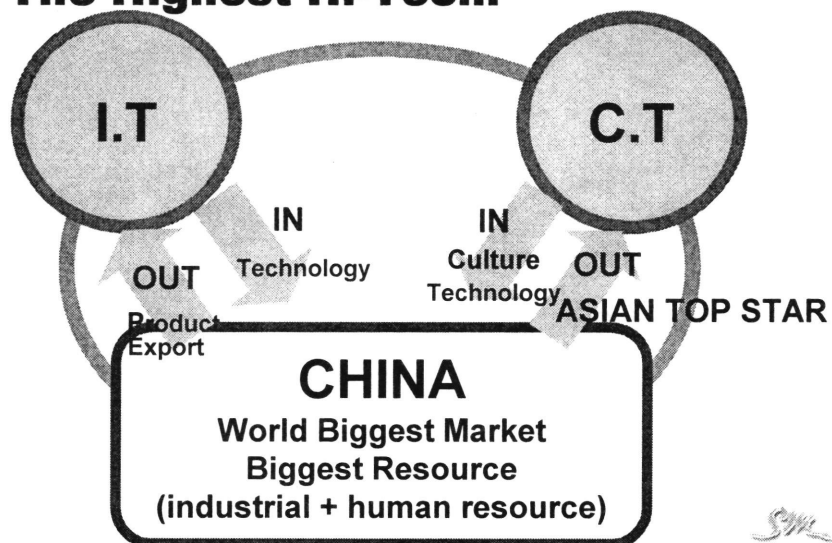
SM

Word Economy Zone

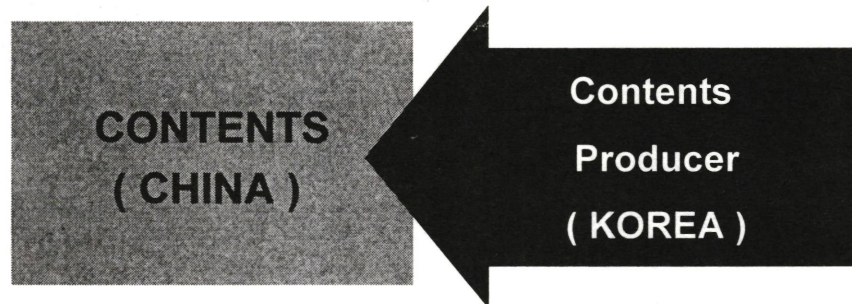


Culture is Technology !!

- The Highest Hi-Tech!



21st Century – “ Contents Producer ”



C.T. / Producing

SM

Asian Top Star is World Top Star



SM

Culture First, Economy Next



- ✓ White → Black
(Cool Man)
- ✓ English
(Cool Language)



- ✓ Chow Yun Fat (Cool Man)
- ✓ Chinese (Cool Language)
- ✓ Japan Animation
- ✓ Korean Singer, Actor (Cool Man)

“Formation of Asian Culture”

Birth of Asia Top Star



“I’ll be the Asian Diva,
neither Korean nor Japanese”

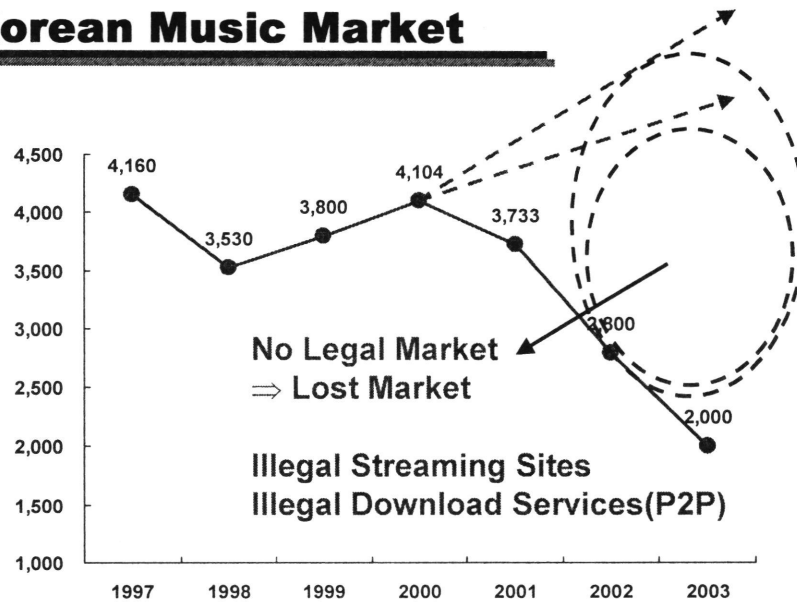
Chosun Daily, 2004. 2. 15.

BoA Awarded “Most Influential Artist in Asia”
in MTV Asia Award

First time for Korean Singer,
More than 150 Million Household Watched
Around the World

- Emerging Asian Value, Asian Culture
and Asian Image
- With the Korean Wave, the Concept of
“Asia, Asia人, Asia Culture” starts

Korean Music Market



Korean Music Business Environment

[Institutional Environment]

KAPP 音源製作者協會

Music Trust Management

音源信託管理

=> Illegal Site Legalize

=> Legal Site illegalize

PWL

[Priority Watch List]

by USTR

[Industrial Environment]

Illegal Streaming - Bugsmusic

Illegal P2P - Soribada

Convergence Devices

- MP3 Phone

Unceasing Piracies

No Ground for legal Music Service

What we need for IPR Protection

1. Legal Systems to prevent and punish Piracy

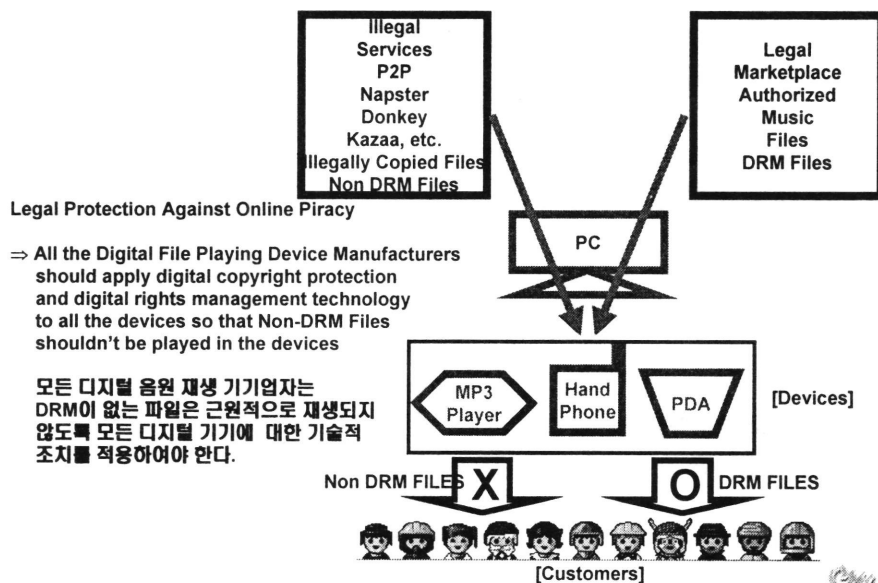
- Exclusive Transmission Right
- Laws to regulate illegal internet services (streaming&p2p)

2. Immediate Administrative Action

3. Asian DRM/Copy Protection Standard

SM

IP Protection Standard



Animation

한국과 중국의 애니메이션 합작 활성화를 위한 협력 방안

서울무비 프로듀서 이 병규

elazen@seoulmovie.com

SoulMovie

목 차

1. 한중 공동 제작의 필요성
2. 한국 애니메이션 기획의 변화 방향
3. 중국 애니메이션 산업의 발전 현황
4. 한국과 중국의 공통의 문제점
5. 한국과 중국의 애니메이션 제작 및 사업 현황 비교
6. 한중 합작 시스템 설정 - 요랑아 요랑아2 추진 사례
7. 향후의 한중 합작 및 협력 촉진 방안

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1. 한중 공동 제작의 필요성

투자 위험성 분산

▶ 한국과 중국 양국의 공동 자본 투자를 통해 투자 부담 및 위험성 분산

시장 수익 확대

▶ 한국과 중국의 시장 확대 및 해외 시장 진입을 위한 협력
 - 양국 투자회사(사업업체)의 사업담당 권역의 동시적이고 집중적인
 시장 수익 확대를 위한 노력 (국가별, 권역별로 공동 수익 배분)
 - 세계 시장의 전체 수익 확대를 위한 공동 노력의 시너지 효과

공동의 소재 검토

▶ 공동 기획 및 검토를 통한 소재와 작품의 한국, 중국의 동시 흥행성 담보
 ▶ 한국과 중국 양국의 TV, 극장 등에 맞는 내용과 형식, 심의 조건 등에
 관한 공동 보조 가능

제작 분업화의 효율성 및 경제성

▶ 한국과 중국의 제작 담당 부분을 분업화
 ▶ 제작 인력, 제작시스템의 효율적 결합을 통해 비용, 일정의 경제성 확보

▶ 정서적으로 유사성을 지니고 지리적 이점이 있는 중국과의 협력이 증가하고
 적극적으로 추진되고 있는 추세
 ▶ 한중 합작의 협력 시스템은 장기적으로 유럽 및 미주 시장 블록화에 맞선
 동아시아 블록화의 제작 경쟁력 강화의 주요한 기반

SoulMovie

■ 중국과의 주요 공동제작 작품

작품명	국내 제작사/ 투자사	중국 제작사/투자사	비 고
스페이스킵합덕	선우엔터테인먼트	상해카툰문화발전유한공사	2002-2003. KBS 방영
네티비	썬엔터테인먼트	여명양양문화전파유한공사	2004. KBS 방영
접지전사	동우애니메이션, SBS프로덕션강 원정보영상진흥원, 한빛소프트	Perfect Media International (중국) Animation International(일본)	2004. SBS TV방영 예정
오디션	라스코엔터테인먼트	금중문화발전공사	극장용(제작중)
요량아 요량아2	서울우비	차이나필름그룹 화룡디지털프로덕션	TV시리즈(기획중)

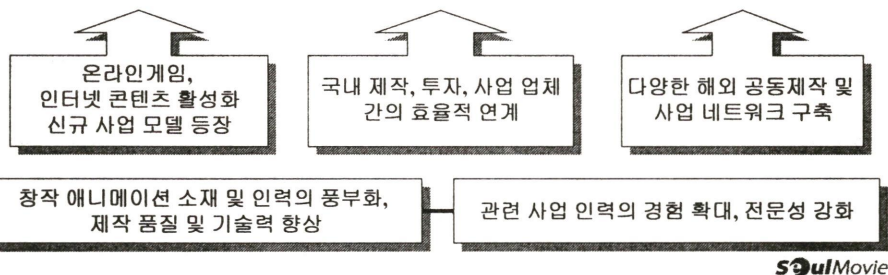
■ 일본, 미주, 유럽과의 주요 공동제작 작품

작품명	국내 제작사/ 투자사	해외 제작사/투자사	비 고
큐빅스	씨네픽스, 대원C&A	4Kids.ent (미국), JR기획 (일본)	2002(SBS), 2004(KBS)
탈블레이드	손오공 (한국)	- 디라이츠 (일본)	2002. SBS 방영
포트리스	-SBS프로덕션, 대원C&A, -동우애니메이션, CCR	반다이, 선라이즈(일본)	2003-2004. SBS 방영
배틀비드맨	손오공, KBS	디라이츠 (일본)	2004. KBS 방영중
라그나로크	그라비티, 자엔지엔터테인먼트	R.O. Production (일본)	2004. TV 방영예정
라즈베리타임즈	코코엔터테인먼트, 소빅창투	워브, 코메트 (일본)	2004. TV 방영예정
뿌까	부즈클럽, 넥슨	Fox Kids Europe Properties (유럽)	TV시리즈, 제작중
오드페일리	삼지애니메이션, 소빅창투	- Timoon, CNC (프랑스)	TV시리즈, 제작중
신앙행어사	캐릭터플랜, 대원C&A 상성벤처투자, KTB네트웍	소학관, 이마지카 엔터테인먼트, 닛쇼이와이, 클룩웍스, OLM 등(일본)	극장용, 11월 26일 개봉 예정
토이워리어	서울우비	•국내 전액 투자, 미국 외주 제작	극장용, 제작완료

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2. 한국 애니메이션 기획의 변화 방향

- ▶ 애니메이션제작사, 투자회사, 사업업체 등 전문 회사간의 프로젝트 컨소시엄 구성의 활성화
- 원활한 제작비 조달과 효율적인 공동 사업을 위한 기반
- ▶ 국내에서 기획한 애니메이션이 중국, 일본, 유럽 등과 다각적인 해외 공동 제작 활성화
- ▶ 온라인게임, 플래시애니메이션 등 인터넷 중심의 콘텐츠가 애니메이션 소재로 적극 활용되는 경향
- TV시리즈, 극장용 등의 대작 애니메이션 이외에 인터넷 애니메이션의 다양한 사업모델 등장
- ▶ 3D 디지털 애니메이션이 TV시리즈, 극장용 등으로 대규모 제작이 진행되고 있음
- ▶ 원작이 없는 오리지널 창작물 경우에도 확실한 머천다이징 수익 모델을 갖춘 작품의 기획



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3. 중국 애니메이션 산업의 발전 현황

정부의 강력한 지원 정책

- ▶ 중앙 정부가 애니메이션 제작 및 산업의 활성화를 위한 적극적인 정책 지원 실행
 - 방송 프로그램중 자국산 60%의 쿼터제도 시행, 애니메이션 제작 분량의 확대 정책 지속화
 - 애니메이션의 제작 자금 확보 및 기술 습득을 위해 해외 합작을 장려하고 이를 지원하는 정책 수립
- ▶ 애니메이션 채널, 아동/청소년 채널의 설립을 확대하는 정책 실행
 - CCTV12 아동채널(2003년), 湖南金鹰卡通卫视(2004년), 北京TV애니메이션 채널(2004년) 등 아동, 애니메이션 채널 적극 신설

본격적인 사업 모델 등장

- ▶ 중국 자체 제작 애니메이션의 캐릭터 등 부가 사업 연계 모델의 등장
 - <나타전기: The Legend of Nezha > : CCTV 제작, 2003년~2004년 최대 흥행작.
출판, DVD, 문구, 완구 등 상품 출시.
애니메이션 사상 최고의 시청률, 아동출판부분 최대의 베스트셀러
 - <람마오: 蓝猫>: 호남상진카툰공사 제작, 중국 지역방송국 중심으로 중국 전역에 방송.
2004년 상반기 CCTV 방송. 3,000개의 프랜차이즈점에서 봉제 인형 등 캐릭터 상품 판매
- ▶ 민영기업 제작분량의 증가 현상 및 사업 전문회사의 등장
 - 2003년 29,000여분 중에서 민간기업의 제작분량이 18,000여분, 중국 전국 총 제작분량의 63%
 - 민영기업의 증가는 새로운 현상, 또한 사업전문회사 등장으로 캐릭터 등 판권 사업 전문화 진행

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3. 중국 애니메이션 산업의 발전 현황

대규모 투자와 자체 기획 제작 역량의 강화

- ▶ 애니메이션 하청생산국 성격에서 자국산 Pre-Production 기획이 적극적으로 활성화 되기 시작
 - 기존의 2D이외에 3D, 플래시애니메이션 등 다양한 제작 방식 시도
- ▶ TV시리즈 작품의 다량의 편수 제작을 통한 사업의 안정성, 지속성 확보, 이를 통한 사업 확대
 - 5분물 200-300편 제작(플래시 애니, 3D애니), TV시리즈 30분물의 경우도 52편 이상이 일반적
- ▶ 기존의 고전물 중심에서 탈피하여 Target, 장르, 소재를 다양화
 - 유아교육물, 아동, 청소년까지 Target의 다양화
 - 고전 소재의 현대화. 현재 아동, 청소년의 트렌드를 반영한 현대물 기획도 활성화

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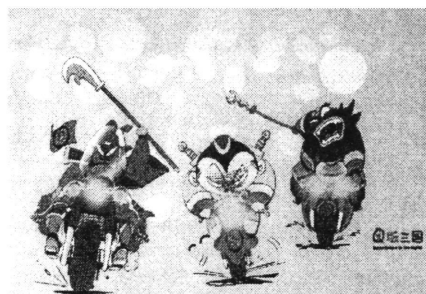
나타 전기 (TV시리즈)



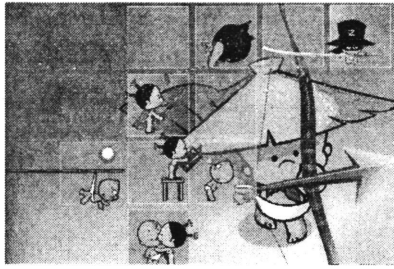
나타전기 캐릭터 상품



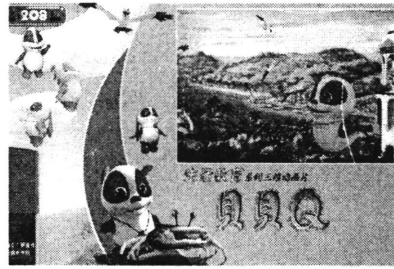
풍운 (90분 극장용)



Q판 삼국 (25분*39편 TV시리즈) SoulMovie



샤오포하이 (5분*365편 TV시리즈)



즈즈Q (BabyQ, 6분*208편 TV시리즈-유아교육물)



항아분월 (90분 극장용)



샬러드 영어학원
(10분* 103편 TV시리즈)



하이즈즈 (22분*52편 TV시리즈)

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4. 한국과 중국의 공통의 문제점

1) 방송 수요 증대와 제작 물량의 공급 부족 현상

TV 총량제 방송법 실시 이후 수요 증대, 공급 부족 현상이 예상됨

- ▶ 2005년 7월부터 시행되는 애니메이션 총량제 방송법에 의해 현재 연간 8,000분 정도의 신규 애니메이션 의무 방영시간이 연간 15,000분 분량으로 늘어남
 - 총량제 방송법: KBS, MBC, SBS 등 지상파 방송사가 신규 애니메이션을 전체 방송 총시간의 1% 이상 의무적으로 편성해야 하는 법령
- ▶ 현재 실제 제작이 진행되고 애니메이션 제작 분량으로 신규 편성을 채우기에 어려움이 발생

급격한 제작량의 증가에도 불구하고 방송국의 수요를 충족시키지 못함

- ▶ 애니메이션 제작분량이 1996년 3,000분, 2000년 13,000분, 2003년 29,000분으로 비약적인 증가세 (2004년 37,000분, 2005년 48,000분 목표)
- ▶ 1000여개의 영화관, 34개의 성급 방송국, 600여개의 시급 방송국, 지방 현급까지 포괄하면 3,000여개의 TV방영 기구
- ▶ 모든 TV방송기관은 매일 10분 이상, 위성채널은 매일 30분 이상 애니메이션을 방송해야 함. 이중에서 60%이상 국산이어야 함. - 현재에도 250,000분의 제작 분량이 필요함.
- ▶ 수요와 공급 분량의 막대한 차이 발생. - 저비용으로 다량의 작품 투자, 작품 질 하락의 우려

한중 양국에서 동시에 자국산을 인정받는 합작 작품을 공동 투자, 제작하여
애니메이션 작품의 공급 부족 현상의 완화에 기여

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2) 시장 및 사업 시스템의 문제

내수 시장의 한계성, 사업적 성공이 어려움

- ▶ 국내 시장의 협소함으로 인해 소수 작품을 제외하고 국내 시장에서 제작비 회수와 수익 창출이 어려움 - 현재 해외 공동제작 및 해외 배급라인 확보에 적극적
- ▶ 작품 기획 및 제작 / 파생상품 개발/ 마케팅/ 자금 운영 등의 경험이 축적되어 있지만 소수 작품을 제외하고 사업적으로 성공한 작품이 미비함
- ▶ 만화출판시장 축소로 인기와 사업성이 검증된 원작 소재 개발이 어려움
- 온라인게임, 인터넷콘텐츠(플래시애니메이션) 등 새로운 원작소재 개발 영역과 연계할 필요성

안정적인 시장 형성 미흡, 사업 노하우 축적 필요

- ▶ 애니메이션, 캐릭터 사업 관련 안정적인 사업 시스템이 형성되어 있지 않아 시장을 통해 제작비 회수의 어려움
- 애니메이션 및 캐릭터 판권가격의 표준화 및 합리적 책정, 지적재산권 보호 등의 필요성
- ▶ 작품 기획 및 제작 / 방송 / 파생 상품 개발/ 마케팅 등 애니메이션 관련 산업의 제반 시스템 설정과 조정의 필요성 - 이를 적극적으로 추진할 민영 기업 육성의 필요성
- ▶ 규모있는 출판만화 시장 미형성 - 향후 출판만화 활성화 필요, 새로운 원작소재 개발 영역의 연계 필요

한국과 중국이 양국의 시장 및 사업 노하우를 공유하며 상호 지원,
동시에 해외시장의 배급 네트워크를 공유하여 수익 확대

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5. 한국과 중국의 제작 및 사업 현황 비교

한국

-90년대 중반 이후 사업 및 마케팅 경험 축적
-해외 공동제작 활성화 및 해외 배급망 확보

자국내 시장 협소, 투자 수익 회수 어려움

사업적 애니메이션 제작을 위한
기획 Pre-Production 인력 및 창의력 풍부
(시나리오, 디자인 설정, 연출 등)

Main- Production 인력 축소,
OEM 가격 경쟁력 약화
(원화, 동화, 디지털후반 제작 등)

출판만화 시장 축소 (일본 출판물 시장 점유)

온라인 게임, 인터넷, 모바일 시장 팽창

총량제 방송법의 쿼터제,
다양한 제작 및 사업 지원제도

중국

- 2003, 2004년 사업, 마케팅 시스템 설정중
- 해외 합작 및 해외 판매 미약

잠재적인 대규모의 자국내 시장 존재

사업적 애니메이션 제작을 위한
기획 Pre-Production 인력 형성 중

Main- Production 인력 풍부,
OEM 가격 경쟁력 보유

출판만화 시장 미약 (일본 출판물 시장 점유)

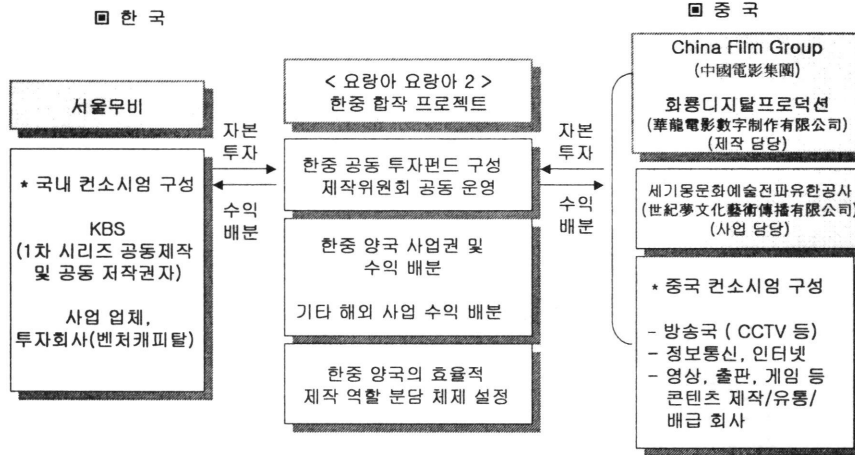
온라인게임, 인터넷, 모바일 시장 팽창

강력한 자국산 쿼터제
제작 지원, 애니메이션 채널 확대

강력한 정부의 지원정책

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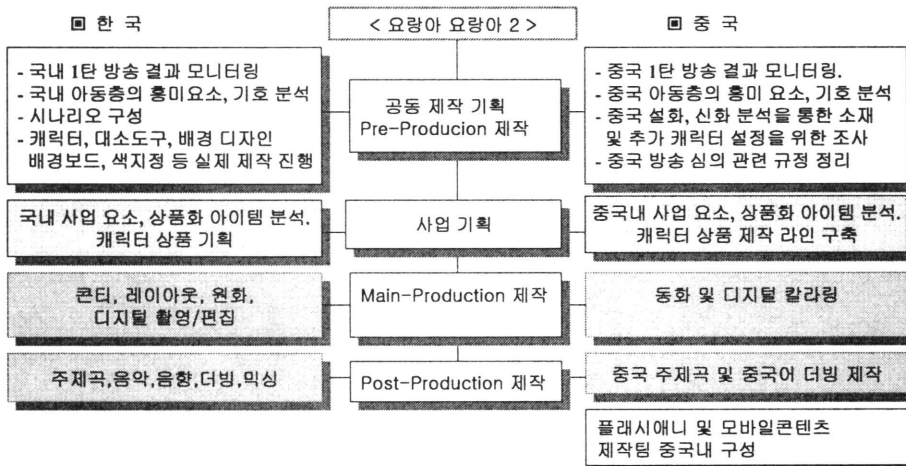
6. 한중 합작 시스템 설정-〈요람아 요람아2〉 추진 사례



- 요람아 요람아1차 시리즈 CCTV채널6에서 2004년 8월, 9월 1차 방송. CCTV이외의 성급 채널, 시급 채널과 방영 계약 진행중
- 1차 시리즈 중국어버전 제작사인 화룡디지털 프로덕션(자이나필름그룹 계열사)에서 2차 시리즈 투자 결정

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□ <요람아 요람아2>의 제작 시스템 추진 방향



단순한 제작 공정의 분업이 아니라 사업 기획과 제작 기획(Pre-Production) 부문에서 한중 양국의 충분한 시장, 타겟, 문화 요소, 방송환경에 대한 조사와 의사소통을 통해 한중 양국 및 동아시아에서 동시에 흥행할 수 있는 작품 기획

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요랑아 요랑아 캐릭터 이미지



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7. 향후의 한중 합작 및 협력 촉진 방안

공동의 소재 개발을 위한 연계 강화 - 이를 위한 정부 정책의 지원

- ▶ 애니메이션 등 콘텐츠의 소재 활용을 목표로 <문화콘텐츠진흥원>이 진행하는 <문화원형 디지털콘텐츠화 사업>에 중국 문화원형에 대한 연구 및 개발 사업도 포함하여 확대 (2003년 70억원, 2004년 70억원 예산 사용)
- ▶ 한국과 중국의 민간 업계와 학계가 애니메이션 소재 개발을 위한 공동의 조사, 연구, 정보 교류 활성화 노력, 이에 대한 양국 정부의 지원 방안 마련 - 양국의 문화 소재의 이질성을 극복, 동질성 있는 소재 기획의 확대

한국과 중국의 애니메이션 업계간 교류 협력 증진

- ▶ <한국 애니메이션 제작자협회>와 <중국 TV예술가협회 카툰위원회>의 '한중 애니메이션 발전을 위한 의결서' 체결, 한중 양국의 애니메이션 관련 정보, 인력 교류, 공동제작에 대한 지원을 목표로 함.
- ▶ 한중 양국의 애니메이션 제작/사업 업체를 중심으로 한 실질적인 교류 협력 증진, 공동제작 및 사업 확대의 기반 설정

한중 합작을 활성화하기 위한 실효성 있는 양국의 자국산 판정 기준 설정

- ▶ 한중 합작을 확대하는 방향에서 양국에서 자국산 인정이 가능한 실질적인 국산 평가 기준 마련 - 상호 논의 및 의견 제시
- ▶ 저작권 공유, 제작비 투자 비율, 인력 참여 비율, 원작소재의 성격 등에 있어서 실효성 있는 자국산 판정 기준 설정

한중 합작을 위한 투자 지원, 법 제도 개선 - 양국 정책기관이 동시에 지원 환경 조성

- ▶ 한중 합작 작품에 대한 정부 출자 펀드의 적극적 투자 지원 - 한중 공동 투자 펀드 구성
- ▶ 양국에서 자국산으로 인정되는 합작 작품의 제작과 사업에 감세 및 면세, 대출 지원, 상품화 허가 등에서 우대 정책 실행
- ▶ 한중 합작 애니메이션 기업(제작사, 사업업체)의 설립 지원
- ▶ 사업의 안정적 수익 확대를 위한 지적재산권 보호와 불법복제에 대한 단속을 강화

SoulMovie

Cooperative Strategy to Foster Korea-China Animation Co-production

SeoulMovie Producer
Lee Byung-gyu

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7. Enforcement scheme for future Korea-China co-production and cooperation



1. Necessity of Korea-China Co-production

Decentralization of investment risk

▶ Decentralization of investment risk and burden through the joint capital investment between both Korea and China

Increase in market profit

▶ Expansion of markets in Korea and China and the cooperation for foreign market entry
 - Simultaneous and concentrated efforts made in the area covered by the investment companies in both countries for increasing market profit (joint profit distribution by country and by area coverage)
 - Synergy effect of cooperative efforts to increase global market profit

Examination of common subject matters

▶ Guarantee of success in both Korea and China through co-planning and examination of subject matters and the work
 ▶ Joint assistance made possible regarding the content, structure, and censorship policies of both Korean and Chinese TV

Efficiency and economies of division of production

▶ Division of production between Korea and China
 ▶ Benefits in cost and work progress through the efficient collaboration among production manpower and production systems

▶ Recently, co-production with China is on the increase and actively pursued due to cultural similarity and geographical proximity

▶ The Korea-China co-production system will become an important foundation to enforce the competitiveness of East-Asia bloc's production, faced against the bloc formation of European and North American markets.

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Representative works by Korea-China co-production

Name of work	Korean producer/ Invest. Co.	Chinese producer/Invest. Co.	Notes
Space Hip-Hop Duck	Sunwoo Entertainment	Shanghai Animation Film Studio	2002-2003. Aired on KBS
Netibee	Some Entertmedia Co., Ltd.	여명왕왕문화전파유한공사	2004. Aired on KBS
Origami Fighter	Dongwoo Animation, SBS Production, Kangwon Information and Multimedia Corporation, Hanbit Soft	Perfect Media International (중국) Animation International(일본)	2004. To be aired on SBS TV
Audition	Lascaux Entertainment	금중문화발견공사	For theaters (in production)
Yorang Yorang2	SeoulMovie	China Film Group 화룡디지털프로덕션	TV series(in production)

Representative works co-produced with Japan, North America, Europe

Name of work	Korean producer/ Invest. Co.	Chinese producer/Invest. Co.	Notes
Cubix	Cinepix, DaiwonC&A	4Kids.ent (USA), JR Production(Japan)	2002(SBS), 2004(KBS)
Top Blade	Sonokong (Korea).	- 디라이츠 (Japan)	2002. Aired on SBS
Fortress	-SBS Production, Daiwon C&A, -Dongwoo Animation, CCR	Bandai, Sunrise(Japan)	2003-2004. Aired on SBS
Battlebeadman	Sonokong, KBS	디라이츠 (Japan)	2004. Aired on KBS
Ragnarok	Gravity, G&G Entertainment	R.O. Production (Japan)	2004. To be aired on TV
Raspberry Times	Koko Enterprise, Sobig Investment Corporation	Weave, Comet (Japan)	2004. To be aired on TV
Pucca	Postnut, Nexon	Fox Kids Europe Properties (Europe)	TV series, in production
Odd Family	Samji Animation, Sobig Investment Corporation	- Timoon, CNC (France)	TV series, in production
Munsu 2004	CharacterPlan, DaiwonC&A Samsung Venture Investment, KTB Network	소학관, 이마지카 엔터테인먼트, 넷소이와이,클록웍스,OLM 등(일본)	For theaters, to be launched on Nov. 26 th
Toy Warrior	SeoulMovie	All domestic investment, Production in US by outsourcing	For theaters. Production finished

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3. Recent development in Chinese animation industry

Strong Governmental Support Policy

- ▶ Strong and active support policy of the central government to encourage the production and industry of animation.
 - Policy for quartering 60% of broadcasted programs made in China. Continuation of policies to increase the number of animation production
 - Policies made to encourage and support foreign co-production for capital security and technique acquirement
- ▶ Policies for the expansion of kids/young adult channel and animation channel establishment
 - CCTV12 Kids Channel(2003), 湖南金鹰Cartoon Satellite Channel(2004), BeijingTVAnimation Channel(2004), etc. Establishment of Kids and Animation Channels

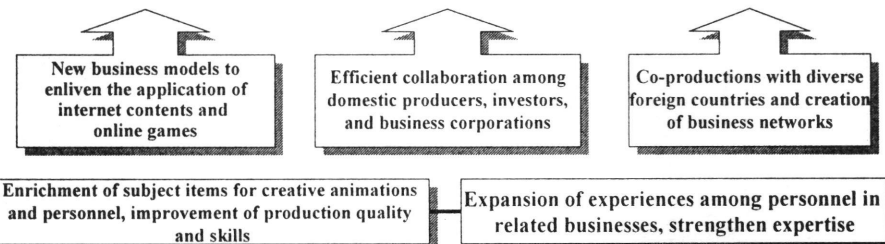
Introduction of a Substantial Business Model

- ▶ The introduction of connective model across value-added businesses such as animation characters made in China
 - <The Legend of Nezha > : Produced by CCTV, biggest hit of 2003-2004. Products such as books, DVD, stationery, toys launched. Highest viewing rate in the history of animation, biggest bestseller in children's books
 - <Ranmao: 藍貓>: Produced by 호남삼진카툰공사, aired nationwide in China, mainly via regional broadcast centers. Aired on CCTV in the first-half of 2004. Character items such as stuffed boys sold in 3,000 franchise shops.
- ▶ Increase of production amounts in private companies and the birth of expert business companies
 - The new phenomena of a 63% increase(18,000 pieces) of total production amount in China by private companies amongst the 29,000 works of 2003. With the birth of expert business companies, specialization of copyright businesses such as character products.

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2. Direction of change in Korean animation planning

- ▶ Active construction of project consortiums among expert companies such as animation production companies, investment companies, and businesses
 - foundation for securing cash flow covering production costs and for the efficient collaboration
- ▶ Active foreign co-production of domestically formulated animations with diverse countries such as China, Japan, and Europe
- ▶ Active application of online internet contents such as online games and flash animations as subject items for animation films
 - diverse business models for internet animations introduced, other than large-scale animations such as TV series and theater productions.
- ▶ Large-scale productions of 3D digital animations being progressed for TV series and theaters
- ▶ Works planned with clear merchandising profit models even in the case of original creations without the original work.



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3. Recent development in Chinese animation industry

Strengthening large-scale investments and capacity of domestic planning and productions

- ▶ From a subcontractor country of animation production to the development of active application of domestic pre-production planning
 - diverse production techniques attempted, such as 3D and flash, other than the previous 2D works
- ▶ Stability and durability of business ensured through the production of a large number of TV series episodes and the expansion of business as a result
 - production of 200-300 5 minute episodes(flash animation, 3D animation), over 52 episodes are the norm for a 30-minute TV series
- ▶ Diversification of genre and subject item, beyond the existing classics
 - diversify the target to infant education, children, and teens
 - modernization of classic themes, actively pursue modern stories that reflect the trends of children and teens of today

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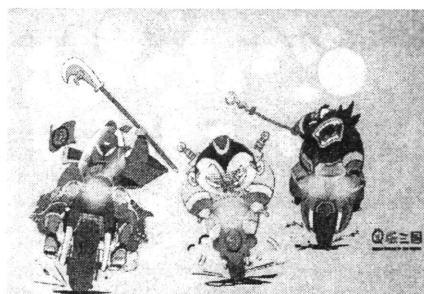
The Legend of Nezha (TV Series)



Character products of The Legend of Nezha

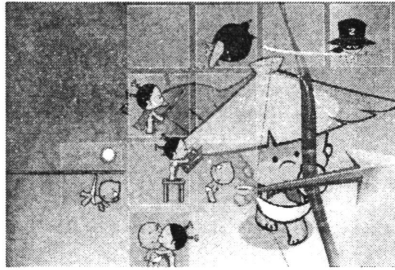


The Stormriders(90 min. for Theaters)

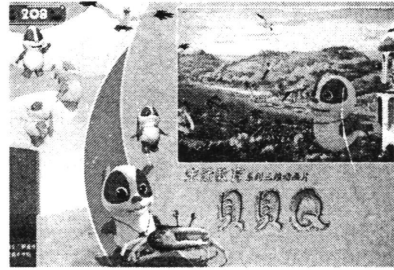


Three Kingdoms Q-version (25 min. *39 episodes TVseries)

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샤오포하이 (5 min. *365 episodes TVseries)

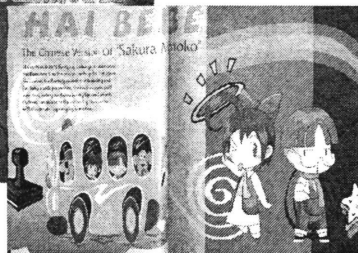


BabyQ (6 min. *208 episodes TV series, infant education)



The Goddess Chango's fly to the moon (90 min. for Theaters)

Salad English Academy
(10 min. * 103 episodes TV series)



Hi Baby(22 min. *52 episodes TV series)



4. Common problems of Korea and China

1) Increase of broadcasting demand and shortage of production supplies

With the introduction of TV Minimum air time act, demand will increase while supplies will fall short

Korea

- ▶ Due to the animation quota act starting from July of 2005, the mandatory airing time for new animations will increase from 8,000 min. to 15,000 min. per year.
 - * Minimum Air Time Act: a law stating that national broadcasting stations such as KBS, MBC, SBS have the obligation to allot a minimum of 1% of the total airing time to new animations
- ▶ Difficulty in creating enough works to suffice new programming with the animations currently under production

China

Despite the surge of production rates, not enough to satisfy demand of broadcasting stations

- ▶ Extreme surge of animation production rates: 3,000 in 1996, 13,000 in 2000, and 29,000 in 2003 (37,000 in 2004, 48,000 targeted for 2005)
- ▶ App. 3,000 TV broadcasting systems including 1000 theaters, 34 state broadcasting stations, 600 city stations, and district/regional stations
- ▶ All TV broadcasting stations must air a minimum of 10 minutes, in the case of satellite broadcasting stations, a minimum of 30 minutes of animation.
 - Over 60% of these must be domestic – currently 250,000 episodes must be produced
- ▶ Great gap between supply and demand – investments for larger amounts with low budgets, may result in the drop in quality

Joint investment and production for co-production projects that may be recognized in both countries and contribute to the relief of the shortage in the supply of animation

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2) Problems of market and business systems

Limitation of domestic markets, success made difficult

- Korea**
- ▶ Due to the narrowness of domestic markets, recovery of production cost and profit creation is difficult in the domestic market with an exception of a few works – currently, active pursuit of foreign co-production and foreign distribution channels
 - ▶ Experiences in planning and production/ derivative merchandise development/ marketing/ fund management, but very few animation works have been a success, business-wise
 - ▶ Difficulty of developing original works that guarantee entertainment and success with the reduction of the cartoon publication market
 - necessary to collaborate with area for new original works development such as online games and internet contents (flash animation)

Market in want of stability, accumulation of business know-how is needed

- China**
- ▶ No stable business system established in the field of animation and character business, thus resulting in a difficulty to recover production costs through the market
 - standardization and rational arrangement of animation and character copyrights and protection of intellectual property rights needed
 - ▶ System formulation and calibration of animation related businesses such as planning and production/ broadcasting/ derivative merchandise development/ marketing are needed – a private company to actively pursue this process must be nurtured
 - ▶ Non-existence of a substantial market for cartoon publishing- a need for encouragement of cartoon publishing in the future, as well as collaboration with areas for new original works development

Mutual support between Korea and China as they share the know-how of their markets and businesses. At the same time, profit expansion by sharing foreign distribution networks

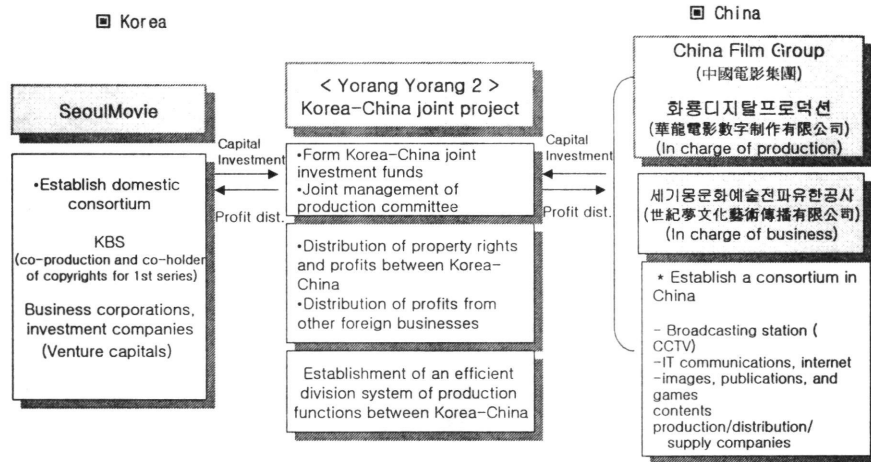
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5. Comparison of animation production and industries between Korea and China

Korea	China
-Accumulation of experiences in business and marketing after the mid 90's -Active foreign co-production and security of foreign distribution networks	-Business/Marketing system under formulation for 2003, 2004 - Lack of foreign co-production and overseas sales
Narrow domestic markets, difficulty in recovering return-on-investment	A large domestic market with potential
Abundance of pre-production planning manpower and creativity for the production of commercial animation (scenario, design, production etc.)	Manpower being fostered for pre-production planning for the production of commercial animation works
Reduction of Main- Production manpower, OEM price competitiveness weakened (original picture, animation, digital production)	Abundance of Main- Production manpower, possession of OEM price competitiveness
Reduction of cartoon publication market (market secured by Japanese publications)	Weak cartoon publication market (market secured by Japanese publications)
Expansion of online game, internet, and mobile markets	Expansion of online game, internet, and mobile markets
Quota by Minimum Air Time Act, diverse support policies for production and business	Production supported by strong domestic quota policy, increase of animation channels
Strong governmental support	

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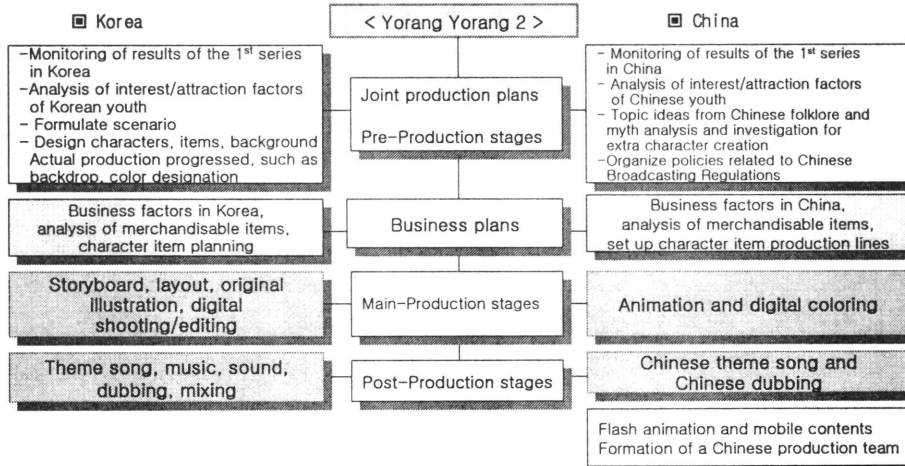
6. Establishment of Korea-China co-production system – Case study of Yorang Yorang 2



- 1st series of Yorang Yorang : 1st aired in August and September 2004 on Channel 6, CCTV.
- Broadcasting contracts under progress with state/city channels other than CCTV
- Producer of the Chinese version of the 1st series, 화룡디지털프로덕션(subsidiary company of China Film Group)

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<Yorang Yorang2>'s production system direction



Project planning for the simultaneous success in both China and Korea as well as East Asia through not just a simple division of labor in the production stages but with thorough investigation and communication of market, target, cultural factors, broadcasting environments with regard to business planning and pre-production

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Yorang Yorang Character Image



7. Korea-China co-production and cooperation strategies for the future

Enforcement of collaboration for joint theme developments – supported by govt. policies

- ▶ Expansion of the 'Digital content transformation project of cultural prototypes' led by 'Korea Culture & Content Agency', aimed at utilizing contents from animations etc., by including R&D project of Chinese cultural prototype (7 billion KRW in 2003, 7 billion KRW in 2004 budget)
 - ▶ Encourage efforts at joint research, investigation, information exchange for theme development between the private industries and academia of Korea and China.
- Supportive measures from both governments – overcome cultural differences of themes, expansion of production under a common theme

Increase of cooperation between animation industries of Korea and China

- ▶ Conclusion of 'Statement for the development of Korea-China animation' between <Korea Animation Producers Association> and <China TV Artist Association Cartoon Committee>.
- ▶ Aims to support exchange of animation related information and manpower, co-production between Korea-China.
- ▶ Increase of actual interactive cooperation centered around animation production/business companies in both Korea and China, establishment of foundation for co-production and business expansion

Set feasible judgment criteria to activate Korea-China co-productions

- ▶ Set feasible criteria for the recognition of domestic products, focusing on the expansion of Korea-China co-production
- ▶ Mutual discussion and suggestions
- ▶ Set feasible judgment criteria for sharing copyrights, rates of investments, personnel participation rates, consideration original theme, etc.

Improve investment subsidiary and regulations for Korea-China co-production – creation of supportive environment by policy-making institutions of both countries

- ▶ Active investment support by government financing with regard to Korea-China co-production projects – form Korea-China joint investment funds
- ▶ Preferential treatments such as tax-reductions or remissions, financing support, merchandising permit of productions and businesses in relation to domestic works in both countries
- ▶ Support establishment of Korea-China co-produced animation companies (production/business companies)
- ▶ Enforce crackdown of pirated works and protection of intellectual property rights for the stable profit expansion of businesses

2011MOVIE

TV & 放送 1

TV & Broadcasting 1

加强影视文化交流与合作，促进共同繁荣与发展

——在韩国亚洲文化论坛上的演讲

中国广播电影电视节目交易中心总经理马润生

尊敬的各位代表、女士们、先生们：

大家好！非常荣幸与大家相聚在这里，参加此次亚洲文化论坛活动。首先，我借此机会，向韩国亚洲文化产业交流财团以及申铉泽社长先生的盛情邀请并为我们创造这样一个与大家交流的机会表示衷心的感谢！同时，请允许我代表中国国际电视总公司、中国广播电影电视节目交易中心对各位与会代表表示热烈的欢迎！

我们知道，亚洲是一个地域的整体，同时也是一个多样化的整体。在我们中间，有一种不容置疑的团结精神，使我们这些国家能够共同地组成一个伟大的大洲。亚洲的文明其特点就是由各种多样化的文化所组成，海纳百川的文化已经持续了五千多年的时间。一直以来，我们之间彼此熟悉也能够相互学习其他亚洲国家的文明和文化。今天我们来到这里参加这个论坛，目的就是要通过相互交流彼此的文化传统，以及文化活动，进一步加深相互的理解，加强合作，增进友谊，促进共同的发展。

首先，为增进彼此的了解，很高兴在这里向各位介绍中国广播电影电视节目交易中心的有关情况。

中国广播电影电视节目交易中心是中国中央电视台版权节目的全球营销总代理，并且拥有影视节目引进权。业务范围主要是：把国外优秀的影视节目引进到中国；把中央电视台以及中国优秀的电视节目向海外发行；同时向全国各省市、自治区电视媒体发行影视节目、出版发行音像制品；此外，还与海内外影视机构合作投资摄制各类电视节目、代理国内外广告及电视节目的国际交流活动等。近年来，我们每年向中国各电视媒体提供 3000 多小时的电影、电视剧、纪录片、卡通片和综艺、专题类节目；向海外销售电视剧、纪录片、卡通片约 4000 多小时；向国内发行音像制品数千小时；从海外引进数百小时的电影、电视剧及纪录片。其中在海外销售方面，我公司节目外销约占到全国的近 80%，营销网络覆盖 40 多个国家和地区。

近年来，我公司在海外发行的许多电视节目取得了很好的播出效果。例如大型电视连续剧《水浒传》、《三国演义》、《雍正王朝》、《康熙帝国》、《纪晓岚 I、II、III》、《秦始皇》、《笑傲江湖》、《大宅门》、

《粉红女郎》、《蛋白质女孩》等，卡通片《西游记》、《哪吒传奇》、《千千问》等；纪录片《我的朋友》、《海选》、《最后的山神》、《小船小船》等节目成功发行到欧美，在当地主流频道黄金时间播出。2001年，我公司出品的文化专题片《祖屋》还在美国荣获电视纪录片银屏奖。

另外，我们承担着中央电视台 CCTV-4 和 CCTV-9 在海外的落地工作。CCTV-4 完整频道已在 120 多个国家和地区实现了落地入户，对中国大陆以外华语观众的覆盖户数超过 1000 万；CCTV-9 已在 20 多个国家和地区实现了落地入户，用户数字达到 2200 万左右。我公司授权海外 31 个国家和地区的 59 家媒体机构转播中央电视台国际频道 CCTV-4/9 以及 CCTV-4 中的栏目，使中国电视节目在亚洲、欧美、非洲、澳洲各地有效落地。

多年来，我们遵循着“加强合作、促进交流、增进友谊、共同发展”原则，与亚洲许多国家和地区的媒体机构展开了广泛的业务合作。我们与香港特区的影视机构及媒体一直保持着良好的合作关系，特别是在香港回归之后，这种合作关系更为密切。我们与中国台湾地区影视机构的合作也进一步加强。

不得不重点提到，我们与韩国的影视交流也从无到有、从少到多、内容越来越丰富。近年来，我们先后引进了《爱情是什么》、《风之子》、《浪漫》、《华丽的度假》、《洗澡堂老板家的男人们》、《美丽人生》、《看了又看》、《明成皇后》等等电视剧。与此同时，我们也在与韩国的电视机构合作，将中国的电视节目介绍给韩国观众，2003 年，我公司销售到韩国的电视剧有《钱王》、《秦始皇》等共 222 集，纪录片有《神秘中国》、《西部自然》等 65 集。其中《钱王》在韩国 MBC 电视台播出，取得较好效果。这也是近年来韩国主流媒体第一次播出中国节目。2004 年，《小平您好》、《百年小平》、《我想回家》等节目也在 KBS、EBS 等电视台播出。CCTV-4 的《中华医药》等栏目相继在韩国 Hao TV 播出，为韩国观众了解中国打开了新的窗口。目前我们正在与韩国三和公司积极筹备合作拍摄电视剧《什么是爱情》，各项洽谈也在进行之中。

早在改革开放初期，我们就和日本广播协会（NHK）共同投资，通力合作拍摄了纪录片《丝绸之路》，该片无论是在日本还是在中国都取得了前所未有的轰动。现在 we 和 NHK 重拍新的《丝绸之路》已经正式开机。二十年前，中日合作拍摄的 25 集大型系列节目《话

说长江》在国内播出时曾创下 40% 的收视纪录，现在中央电视台正在筹拍 33 集纪录片《再说长江》，这部片不仅能使您从中感受到古老中国文化风情，更能使您从中体味到当代中国变迁之中的人文精神及改革开放发展变化的中国，该片将在 2006 年播出。

除此之外，我们还积极加强与包括新加坡、越南、泰国、菲律宾、马来西亚、伊朗、科威特、文莱等南亚、西亚和中亚各国和地区的影视交流与合作，并取得了积极的成果。在合作内容上，我们也在不断丰富，逐步开发了互联网点播、航线播映等业务。

以上是我公司对外合作的一些基本情况。

事实上，亚洲长期以来一直在进行文化的相互交流和传递，原因是各个国家之间的文化背景是相似的，而且我们有很多共同的主题，这些主题也能够帮助我们建立跨国之间的影视项目，同样也因为我们之间的文化是类似的，所以亚洲的影视人员之间的合作也是和谐的。在最近几年当中，像中国、韩国、日本、中国香港特区、中国台湾地区的影视机构和艺术家们，都在非常努力寻求一种的途径，来发展自己本国的影视行业，他们也制作出来了一些既能适应本国需求，又能为他国所能接受的优秀的影视艺术产品，取得了商业上的成功。这些产品都是具有创造性、独特性、文化特色的。如果我们能够进一步加强亚洲之间的合作，如果我们能够加强市场之间的互动，彼此之间一定能够取得更加丰硕的成果

就此，为进一步加强亚洲各国之间的合作，提一些建议：

1、为了能够促进产业化发展，我们的影视产业必须要国际化。为此，我们要进一步发展有关业务和相关产品的产业链条，形成规模化、产业化、多媒体的立体经营格局。同时我们也要加强我们的分销的网络，加入到更加国际化的网络当中去。在这方面，近年来中国飞速发展的经济为中国发展媒体产业提供了强大的动力，中国政府正在创造条件，积极推进影视产业的发展，这无疑更增强了我们的信心。之前我们与美国华纳公司合作改编10集国际版电视剧《太平天国》，与澳大利亚南星公司合作改编了系列纪录片《中国野生动物》、《神秘中国》，与加拿大CINA公司合作了动画片《西游记》，与香港中艺通讯公司合作了《笑傲江湖》电影电视版等，目前正在筹备改编我公司与中央电视台合作拍摄的专题记录片《复活的军团》，这些节目发行到遍布欧洲、美洲、大洋洲、非洲的60多个国家和地区，受到普遍欢

迎。我想在这方面，我们亚洲各国之间应该有更多的合作内容。

2、在引进节目方面我们应该更加开放。中国加入世贸组织后，中国的社会和经济进一步开放，中国需要更多优秀的海外影视节目丰富电视荧屏。我们将在原有基础上进一步扩大与海外电视媒体与机构的交流与合作，进一步丰富引进节目的种类，增加引进节目的数量，建立国际电视节目交流发行网络，为国内电视媒体提供更多更好的引进电视节目，同时也把中国优秀的电视节目介绍给亚洲乃至世界更多的国家和地区。让世界了解中国，让中国走向世界。

3、通过国际项目合作的方式，拓展丰富影视节目资源交流和人才的培训。包括用于数字和双语的影视制作人员培训。让亚洲各国影视的人才能够更好地展示自己的工作、更好地了解和合作。我们面对的是一个开放的亚洲影视市场，要求影视文化、产业的发展有良性发展环境，特别是在政府这一层次互相地推动，这样才能够发展一个合作和相互、互动的亚洲影视的产业。当然这将会是一个长期的过程，今天我们在这里共同探讨、交流就是一个很好的形式。我们在中国负责承办的“中国国际影视节目展”也作为一个展出的舞台，为发展亚太地区影视进行着文化的交流和分享。它是中国国家广播电影电视总局和中国广播电影电视集团共同主办一年一度的中国国际广播影视博览会的重要组成部分。2003年和2004年我们已经成功举办了两届，取得了丰硕成果。2005年八月，我们将举办第三届，届时，我们也热烈欢迎国际上，特别是亚洲影视媒体和机构到北京来参与交流。

各位朋友，全球化使一些传统的文化和价值观念发生变化，全球化也促进了文化的发展。密切国际间影视行业的合作与发展，已越来越成为当今国际影视机构的共识。当然，在与各国进行文化交流时，我们也注意到，在今天这个全球化的时代，重要的一点就是要尊重不同的文化、传统和价值，因此我们必须要有宽容、要有耐心来显示和发现在不同的文化、传统和价值观念中间的普遍性，让大家能够产生共鸣，能够相互融合，这样就能够实现融合和并存。我们热忱欢迎在座各位朋友，以各种方式广泛参与中国影视界的合作和交流，让我们进一步增进友谊、加强合作、共同发展！

预祝我们的合作成功，谢谢大家！

**Strengthening the Communication & Cooperation in the Field of Film & TV and Promotion
of Common Prosperity & Development**

--The Lecture on the Forum of Asian Culture in Korea

Chief Manager of China Radio, Film & Television Programs Exchanging Center

Ma Runsheng

Your Honored representatives, Ladies & Gentleman:

Hello, everybody! I feel honored to come here and take part into the Asia Culture Forum. Firstly, I would like to take this opportunity to express our sincere thanks to Chairman of the Korea Foundation for Asian Culture Exchange, Mr. Shin Hyuntaek, for his great kindness invitation and give us this chance to communicate with each other! And I would represent China International Television Corporation and China Radio, Film & Television Programs Exchanging Center to express to my great kindness welcome to all representatives.

We know that Asia is not only whole in the region, but also as a diversified land. There is an undoubtedly unite spirit in our hearts and making our countries together then to be a great continent. The characteristic of Asia Culture is formed by the various diversified culture, these different culture has lasted for about five thousand years. For a long time, we have familiarized and learn civilization and culture from other Asian countries. Today, we come here and take part in this forum, in order to get a deeper understanding, strengthen cooperation, and promote friendship and common development through the communication of culture tradition and activities.

First of all, I would like to introduce the situation about China Radio, Film & Television Programs Exchanging Center for everyone in order to get a deeper understanding for each other.

China Radio, Film & Television Programs Exchanging Center is the chief sell-agent for the copyright of the programs from CCTV (China Central Television) in the global, and has the right to import the films and TV programs. The main scope of our business are importing the excellent films and television programs into China, while exporting the excellent television programs from CCTV an China to the abroad; at the same time, we also publish film & television programs and products to the cities, provinces and regional national autonomies in the whole country; Moreover, we also cooperate with film & television agencies from abroad to invest and produce many kinds of TV programs, act as agent for the international communication activities about advertisements and TV programs from domestic and abroad. In recent years, our corporation has provided over 3000 hours programs in the field of film, TV drama, documentary, cartoon, arts carnival and special topic documentary, to the different TV medias in China per year, sold over 4000 hours programs in the field of TV drama,

documentary and cartoon to abroad, published thousands hours film and TV programs in the domestic, import about hundreds of hours films, TV dramas and documentaries from abroad. Our corporation has got about 80% of whole country's film and TV programs abroad selling, and our selling-net has covered more than 40 countries and districts.

In recent years, many TV programs, which published, by our corporation to the abroad has got great effect. For example, we have published the full-length TV drama <All Men are Brothers: Blood of the Leopard>, <The Roman of the Three Kingdoms>, <The Yongzheng Dynasty>, <The Kangxi Dynasty>, <Eloquent Ji Xiaolan I、II、III>, <Emperor Qin>, <Swordsman>, <Large Families>, <Pink Ladies>, <Protein Girls>, etc; Cartoons <The Journey to the West>, <The Legend of Nezha>, <Thousands of questions>, etc; documentaries <My Friend>, <Extra Large Election>, <The Last Mountain God>, etc to the Europe successfully, and got the chance to be broadcasted on the golden time of main channels in the local. In 2001, the culture special topical documentary <Ancestral House>, which was published by our corporation, had got the Documentary Silver Award in United States.

In addition, our corporation also takes on the job of CCTV-4 and CCTV-9 settles on the abroad. CCTV-4 whole channel has settled down over more than 120 countries and districts, and the oversea Chinese audience has over 10 million; CCTV-9 has settled down 20 countries and districts and the audience have reached about 22 million. Our corporation also gives the authority to 59 oversea media agency from 31 countries and districts, to broadcast the CCTV international channel CCTV-4/9 and the programs in the CCTV-4, and makes Chinese TV programs effective settle down in the Asia, Europe, America, Africa and Australia.

For long times, our corporation follows the principle "strengthen cooperation, promote communication, enhance friendship and pursue common development", and widely cooperates with many Asian media agencies from different countries and districts. We always keep the well cooperation relationship with film & TV agencies and media from Hong Kong Special Administrative Region, especially after Hong Kong came back to People's Republic of China in 1997, our cooperation relationship has got more closely. The cooperation between our corporation and film & TV agencies also has got deeper strengthen.

I have to give a special introduction for the film & TV communication between China and Korea. The communication has grown out from nothing and became richer and richer. In recent years, we have imported some TV dramas from Korea: <What is the Love about? >, <Son of the Wind>, <Romance>, <Flowery Vacation>, <Athhouse Eople>, <Beautiful Life>, <Can't Take My Eyes off You>, <The Last Empress> and so on. At the same time, we also cooperate with TV agencies of Korea and introduce Chinese TV programs to the Korean audience. In 2003, our corporation sold 222 volumes TV dramas including <King of Money>, <Emperor Qin > and 65 volumes documentaries including <Mysterious China> and <Western Nature> to Korea. The

TV drama <King of Money> had broadcasted in MBC Television Station and got the great result. It was also the first time for the main channel of Korea to broadcast the Chinese programs. In 2004, the programs of <Hello, Xiaoping>, <Bai Nian Xiao Ping>, <I Want to Go Home> also have got the chance to be broadcasted in KBS, EBS TV station. The programs from CCTV-4, such as <Chinese Medicine> have broadcasted in Hao TV of Korea. These programs have opened a new window for Korean audiences learn more about China. Now, we are busy in cooperating with Samwha Corporation from Korea to shoot TV drama <What is the Love? >, and the cooperative details are also bargaining now.

At the beginning of the Open & Reform period, our corporation invested with NHK from Japan and cooperated on the documentary <The Road of Silk>, which had created an unprecedented sensation in both Japan & China. Now, our corporation has cooperated with NHK again on the documentary < The Road of Silk >, which had formally started. 20 years ago, the 25 volumes documentary <Talking about Yangtze River> which cooperated by China & Japan had made the 40% audience rating record in China, now, CCTV is preparing to shoot 33 volumes documentary <Talking about Yangtze River again>. The documentary is not only make audience to learn the tradition and culture of ancient China, but also let audience to know more about the humanism spirit in the modern China and the changing China in the Open & Reform period. The documentary is planned to be broadcasted in 2006.

In addition, we also strengthen the film & TV communication and cooperation with Singapore, Viet Nam, Thailand, Philippines, Malaysia, Iran, Kuwait, Brunei, etc, and countries and districts from south Asia, west Asia and middle Asia. These communication and cooperation has got effective results. We are always enriching cooperative content, and developing service of order programs on internet and airline broadcasting step by step.

The foregoing is a basic situation for our corporation cooperation with oversea companies.

In fact, the culture communication and transmission always going on for a long time in Asia, because the culture backgrounds of different countries are similar, moreover, we have many common topics, which could also help us to set up film & TV items over different countries. At the same time, we have the similar culture among us, so cooperation among the film & TV staff of Asia could be very harmonious.

In recent years, the film & TV agencies and artists from China, Korea, Japan, Hong Kong Special Administrative Region, and Chinese Taiwan District are always search for a way to develop local film & TV industry. They have produced some excellent film & TV productions, which are not only popular in the local, but also accepted by the audiences from foreign countries, then got the success in the commercial. These products have their own creativity, distinctive and culture

characteristics. If we could strength the cooperation among Asian countries further and interaction in the markets, we would achieve more abundant results.

According to this, I have some suggestions in order to promote the cooperation among the Asian countries further.

First of all, our film & TV industry must internationalize in order to promote the development of industrialized. So, we should develop the industrial chains about the business and productions, and then form a three-dimensional management of dimensional, industrial and multimedia. At the same time, we also have to strengthen our selling net, and take part in the more internationalized net. In this field, the rapidly developed Chinese economic in recent years has offered the great power to the development of Chinese media industrial. The Chinese government is creating condition positively to promote the development of the film & TV industrial. Undoubtedly, this action has strengthened our confidence. Our corporation had cooperated with Warner Corporation from United States to rearrange the TV drama <Taiping Rebelling> into 10 volumes for international audiences, cooperated with South Star Corporation from Australia to rearrange the series documentary <Chinese Wild Animals>, < Mysterious China >, cooperated with CINA Corporation from Canada on cartoon < The Journey to the West >, cooperated with Nationwide Communications Ltd from Hong Kong film & TV dramas < Laughing and Proud Warrior >, now the company is preparing rearrange the special topic documentary <Risen Corps> which shoot by our corporation and CCTV. These programs have published over more than 60 countries and district in Europe, America, Australia, Africa and welcomed in the local. I think in this part, our Asian countries would have more cooperated content.

Secondly, we should have a more open attitude to the import programs. After China took part in the WTO, the society and economic of China has become more opened, Chinese need more excellent film & TV programs from abroad to enrich the TV Screen. We will expand the communication and cooperation with TV media from abroad further, enrich the kinds of importing programs and increase the number of importing programs, set up the publish net for the international TV programs communication, offer the more and better import programs for the domestic TV media, at the same time, we also will introduce the excellent Chinese TV programs to more countries and districts in Asia and whole world. We will not only let the world to learn more about China, but also let China to come into the world.

Thirdly, we will enrich resource communication of film & TV programs and the training for the people through the way of the international project cooperation, including the training for the digital and bilingual workers in the field of film & TV programs production, then let the professional workers in film & TV programs production could show their products well, and learn more from each other and have the well cooperation.

We are up against an open film & TV market of the Asia, which need a well development environment for the development of the film & TV culture and industry, especially on the interaction of the administrative levels, and then it could develop a cooperative and interactive Asian film & TV industry. Of course it will be taken for long time, but it is a very well form that today we come here for discussing and communicating.

“China International Film & TV Programs Exhibition”, which is undertaken by our corporation in China, is also a show stage for the development of film & TV culture communication and participation in the Asia-Pacific district. It is an important part for the China International Radio, Film & Television Exposition, which is hold by the State Administration of Radio, Film & Television and China Media Group year-by-year. We had hold two expositions successfully in 2003 and 2004, and got the plentiful fruits. We will hold third exposition in the August of 2005. At that time, we will welcome the film & TV media and agencies from around the world, especially from Asia, to come Beijing and communicate together.

All my friends, the globalization has not only changed some traditional culture and value concept, but also promote the development of culture. To osculate the cooperation and development of international film & TV industry would be more and more accepted by the nowadays-international film & TV agencies. Of course, we also find that during the culture communication among the different countries, the most important point is respecting different culture, tradition and value, especially in this globalization period. So, we should be allowance, patient to show and discover the common sense among the different culture, tradition and value concept, create resonance for the audience, and then it will realize the amalgamation and common presence. We warmly invite all of friends to join the cooperation and communication with the Chinese film & TV business through the different ways, and promote friendship, strengthen the cooperation and achieve common development.

Hope we could have a successful cooperation. Thank you very much.

**The reciprocal attitudes and popular cultural exchange
in Japan, South Korea and China**

日韓中の相互意識と大衆文化交流

—テレビドラマを中心に—

일.한.중 상호의식과 대중문화교류

-TV 드라마를 중심으로-

KOHARI Susumu

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東アジアにおける大衆文化の波及

- ・1960年代～ アジア各地
日本のアニメの普及
- ・1980年代半ば アジア各地
NHKドラマ「おしん」の流行
- ・1990年代 台湾
日本のテレビ番組が大人気、「哈日族」の出現
- ・1998年～ 韓国
日本大衆文化 段階的開放措置、映画「Love Letter」などヒット(99-2000年)
- ・1999年前後～ 中国・台湾・香港
韓国のテレビドラマ が大人気
- ・2003年～
KBSドラマ「冬のソナタ」など韓国ドラマ大ブーム、「ヨン様」現象(2004年)

ジャパナイゼーション(Japanization)から相互交流へ

「一方向」から「相互交流」へ

アジア域内における大衆文化の流れが「日本(+香港)」⇒「その他の国々」という一方向から、「相互交流」へと変化しつつある。

・「韓流」現象

90年代末から、中国・台湾・香港では、日本のテレビドラマ・音楽に代わって、韓国のテレビドラマ・音楽が人気を博すようになる。

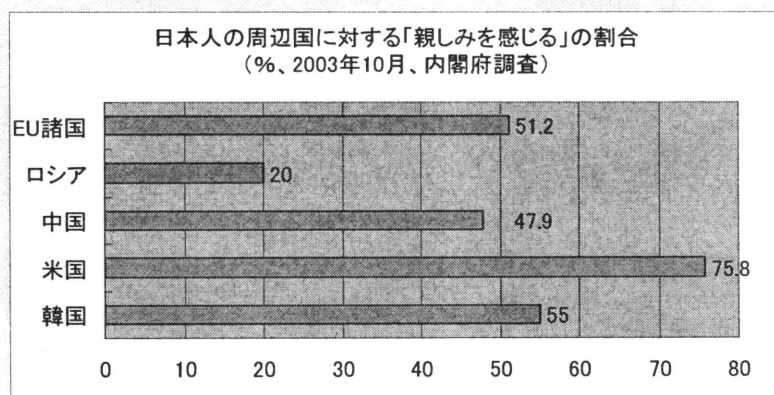
・「韓流」は日本にも

これまで、アジアでは、もっぱら大衆文化の輸出国だった日本で、韓国の映画、テレビドラマ、音楽の人気が高まる。「冬ソナ」ブームと「ヨン様」人気は、2004年日本の一大社会現象に。

・フィリピンで中国語ドラマ流行(2003年、「チノベラ」現象)

台湾テレビドラマ「流星花園」がフィリピンで人気。日本でも放映。

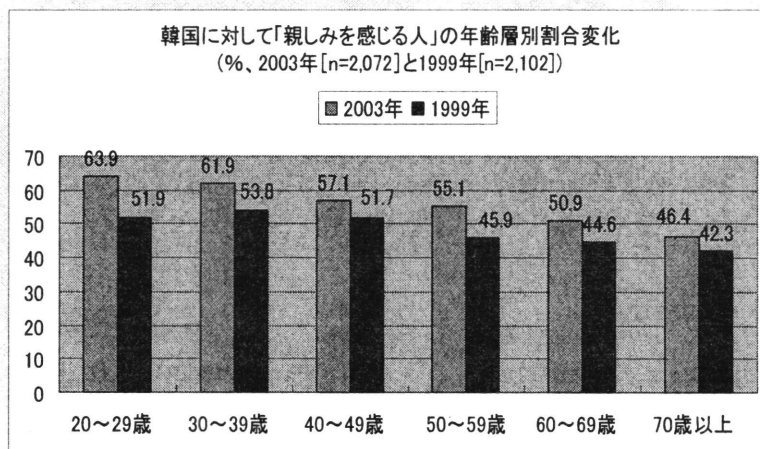
内閣府「外交に関する世論調査」(2003年10月)



日本人の韓・中・米への「親近感あり」の年齢層別割合(%)
(2003年10月、内閣府「外交に関する世論調査」、n=2,722)

	全年齢	20-29歳	30-39歳	40-49歳	50-59歳	69-69歳	70歳以上
対米国	75.8	75.8	79.5	80.1	77.5	76.6	64.2
対中国	47.9	49.5	47.4	48.4	48.5	45.7	49.1
対韓国	55	63.9	61.9	57.1	55.1	50.9	46.4

日本人の韓国への「親近感あり」の年齢層別割合変化
(1999年と2003年、内閣府「外交に関する世論調査」、%)



大衆文化の相互交流に関する研究課題

1. どのような要因がテレビドラマなど大衆文化の国境を越えた流通を規定しているのか。
2. 他国の大衆文化への接触は、その国に対する意識、外交認識や態度にどのような影響を与えるのか。相関関係があるのか。
3. 日本や中華圏での韓流や韓国や中国での日本大衆文化受容は、欧米志向などと相関関係があるのか。

大衆文化の国境を越えた流通を規定する要因

- ・政治的要因
 - 輸入国における規制
 - 輸出国の促進政策
- ・経済的要因
 - 輸出国と輸入国の市場規模の違い
 - 輸入国の経済水準
 - 輸入国における国産大衆文化の供給能力
- ・社会的要因
 - 輸出国と輸入国の人的な交流
- ・文化的要因
 - 輸出国と輸入国の文化的類似性
 - 輸出国への憧憬
- ・技術的要因
 - 情報技術の発展
 - 輸出国と輸入国の制作水準の違い

(石井健一・筑波大学による整理を参考に作成)

文化・情報の流れを決める3要素

1. 「国内の市場規模」

国の規模が大きいほど、ひとつのソフトから多くの収入を得ることができ、それだけ高い製作費をかけることができる→高い製作水準の作品

2. 「人的資本」

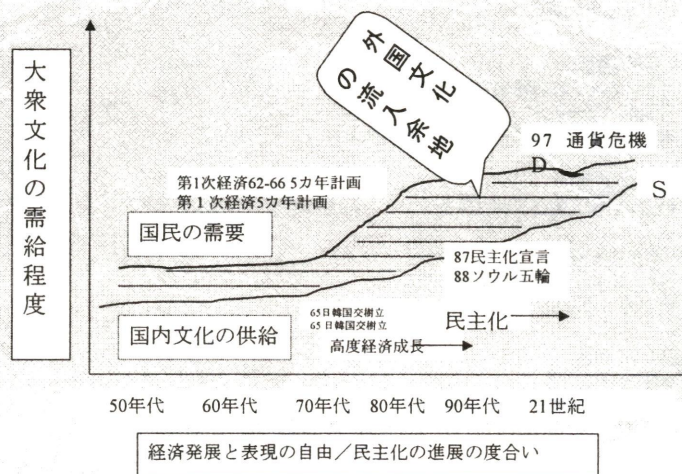
ソフトの作り手が優秀でなければ高い水準のものは生れない。ノウハウ、技術、センスある人材がどれだけいるか

3. 「文化的類似性」

受け手と送り手の文化がどの程度、類似性があるかどうかの問題である。これはコンテンツによって異なるが、送り手国と受け手国の「文化的類似性」が高いほうが流れやすい

石井健一「文化と情報の国際流通」、石井健一編『東アジアの日本大衆文化』（著者社、2001年）、219～221頁を参照。

大衆文化の需要バランスと外国文化の流入余地(韓国)



社会調査を日韓中の主要都市で実施

調査対象: 日本調査～東京と静岡の694名(大学生のみ)

韓国調査～ソウル市民の803名(18～60歳)

中国調査～上海市民の 800名(18～60歳)

実施時期: 日本調査～ 2003年12月～2004年1月

韓国・中国調査～2004年9月

調査方法: 日本調査～自記式質問票調査(集合調査法)

韓国調査～電話調査

中国調査～街頭面接調査

調査内容: 諸外国の大衆文化に対する接触状況、
諸外国に対する関心、諸外国への親近感、
ナショナリズム意識、日本に対する意識、
アジアに対する意識、欧米に対する意識、等

各国調査での周辺国に対する「好感度」の割合(%)

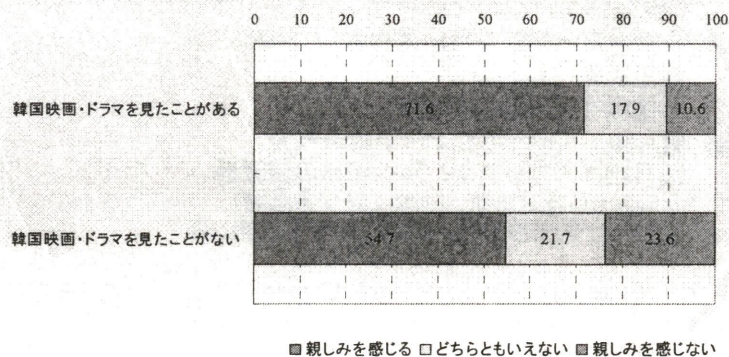
	対韓国	対日本	対米国	対中国	対ロシア	対北朝鮮
日本調査	66.1	——	53.1	43.1	9.8	4.6
韓国調査	——	53.6	55.5	68.8	43.7	62.8
中国調査	59.1	34.4	51.1	——	67.9	34.6

テレビドラマへの接触とその国に対する態度の関係(1) (日本調査→対韓国)

ある国の大衆文化に接触している人のほうが、その国に対して好意的な態度を示す傾向が見られる。

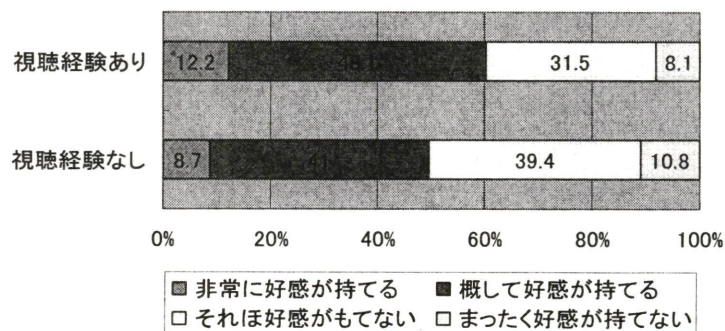
(eg. 99台北調査、02韓国調査、02日本調査)

韓国映画・TVドラマの視聴経験と韓国に対する態度(03年日本調査)

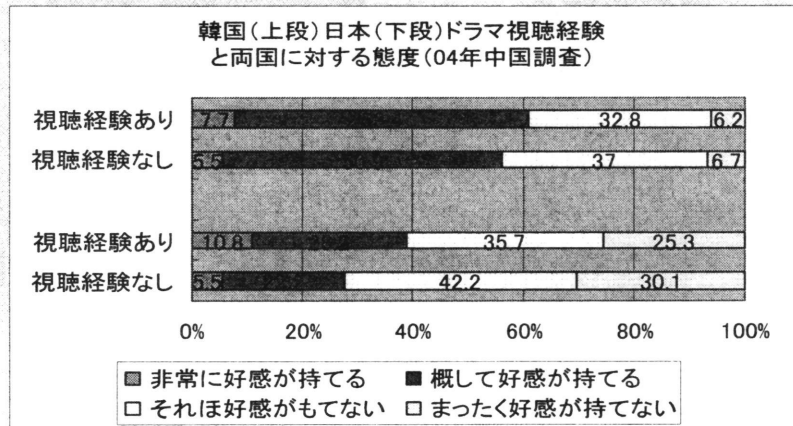


テレビドラマへの接触とその国に対する態度の関係(2) (韓国調査→対日本)

日本ドラマ視聴経験と日本に対する態度
(04年韓国調査)



テレビドラマへの接触とその国に対する態度の関係(3) (中国調査→対日本・韓国)



日本ドラマと韓国ドラマへの接触と選好度 (中国調査)

1. 「日本ドラマを見たことがある」 58.9%
「韓国ドラマを見たことがある」 58.8%

cf. 韓国調査「日本ドラマを見たことがある」 36.7%

2. 「韓国ドラマのほうが好き」 31.1%
「日本ドラマのほうが好き」 19.3%
「どちらともいえない」 37.8%
「わからない」 11.9%

大衆文化への接触と相手国への親近感

相手の国の大衆文化に接触している人のほうが
相手の国に対して親近感を抱いている。

「相手国の大衆文化への接触」

↑ 相関関係 ↓

「相手国に対する親近感」

大衆文化への接触と相手国への態度

今回、紹介した調査結果のデータから、

「相手国の大衆文化に接触したことによって」(原因)

↓

「相手国に対して親近感を抱くようになった」(結果)

と簡単に結論づけることはできない。

∴ 最初から相手国に親近感を抱いている人(原因)ほど、
相手国の大衆文化に接触する傾向が高い(結果)
のかもしれない。

韓国の状況を考えた場合の、日本大衆文化への接触と好意的な態度との関係
韓国の状況

- 1 長い間、反日的イデオロギーが人々の態度や考え方を規定してきた。
 - 2 日本の大衆文化が「原則禁止、実態開放」という形で受容されていた。
- 上記1, 2を考え合わせると、

「日本に対する好意的な態度」(原因)
↓
「日本の大衆文化への接触」(結果)

という因果関係よりも、

「日本の大衆文化への接触」(原因)
↓
「日本に対する好意的な態度」(結果)

という関係のほうが妥当性が高いと思われる。

中国の状況を考えた場合の、韓国大衆文化への接触と好意的な態度との関係
中国の状況

- 1 1992年の韓中国交樹立までの長い間、韓国との関係が閉ざされていた。
 - 2 韓国への好感度が、対日・米よりも高い。
- 上記1, 2を考え合わせると、

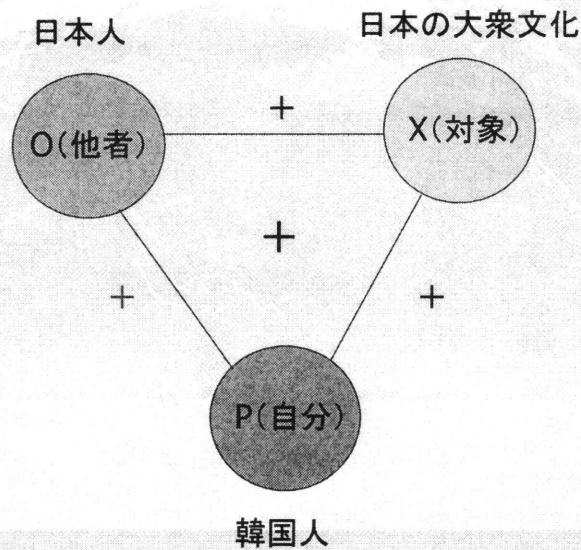
「韓国に対する好意的な態度」(原因)
↓
「韓国の大衆文化への接触」(結果)

という因果関係よりも、

「韓国の大衆文化への接触」(原因)
↓
「韓国に対する好意的な態度」(結果)

という関係のほうが妥当性が高いと思われる。

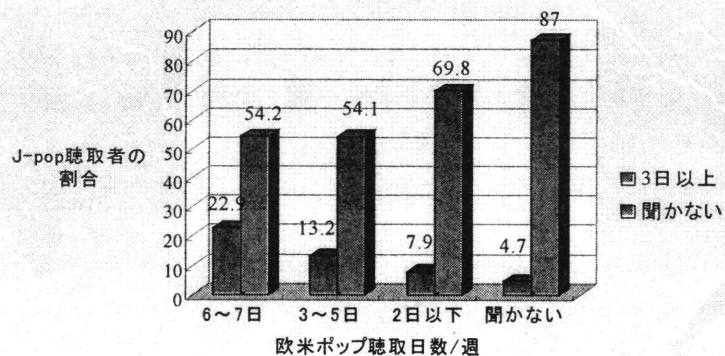
バランス理論(認知的均衡理論)による説明



韓国における日本大衆文化接触と日本における韓流の違い(1)

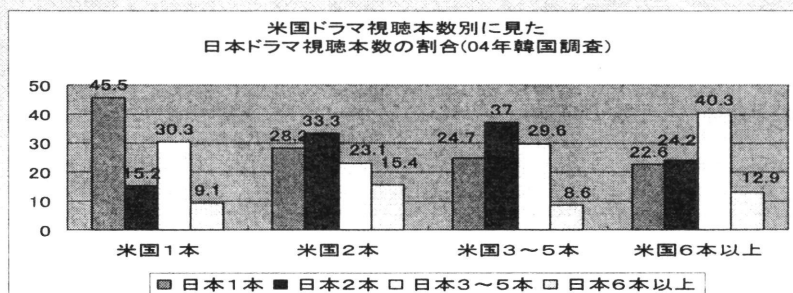
日本の大衆文化に接触している人は、実はアメリカの大衆文化にも積極的に接触している人たち。⇒日本志向と欧米志向の重なり

欧米ポップ聴取日数別にみた、J-pop聴取者数(02韓国調査)



しかし、ドラマの場合は相関関係なしか？（04年韓国調査）

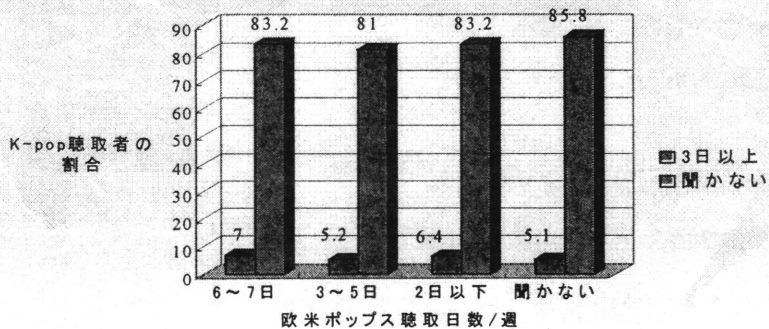
	米国ドラマ視聴本数	日本ドラマ視聴本数	中国・台・香ドラマ視聴本数
米国ドラマ視聴本数	1.000	.442	.621
日本ドラマ視聴本数	.442	1.000	.398
中国・台・香ドラマ視聴本数	.621	.398	1.000



アジアにおけるジャパナイゼーションと日本における韓流の違い(2)

日本における「韓流」に関しては、アメリカの大衆文化によく接触する人ほど
韓国の大衆文化によく接触しているという傾向が見られない。

欧米ポップスの聴取日数別にみたK-pop聴取者の割合
(03日本調査)



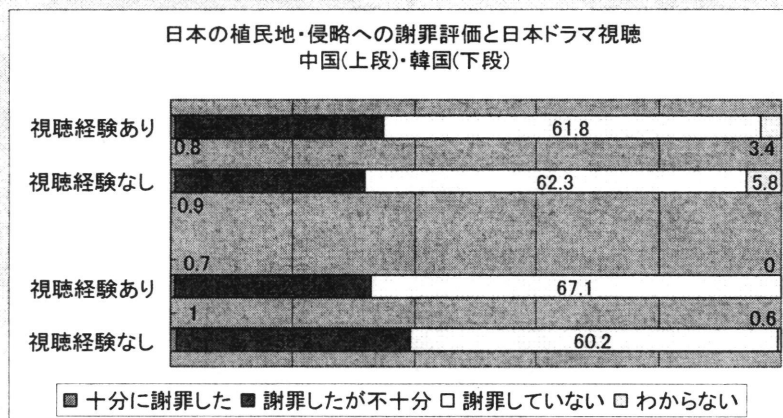
中国における韓国ドラマと日本ドラマ(04年中国調査)

各国ドラマ視聴本数間の相関係数(04年中国調査)

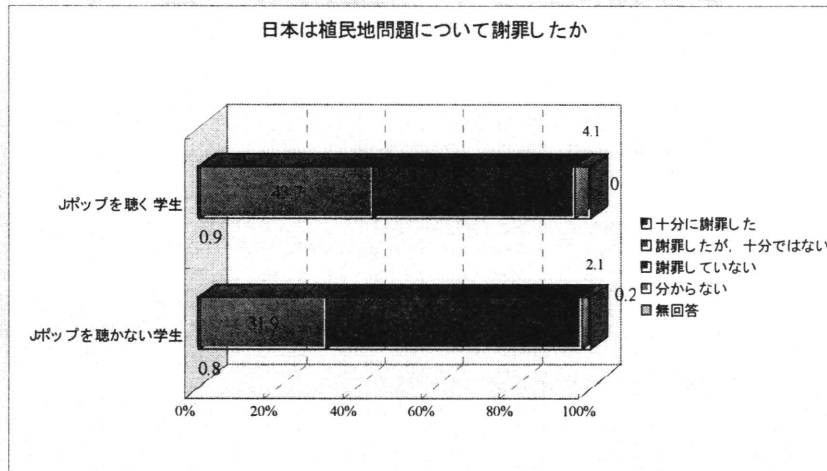
→日韓両ドラマ視聴者は相対的に重なっている

	米国ドラマ 視聴本数	日本ドラマ 視聴本数	韓国ドラマ 視聴本数
米国ドラマ 視聴本数	1. 000	. 155	. 184
日本ドラマ 視聴本数	. 155	1. 000	. 449
韓国ドラマ 視聴本数	. 184	. 449	1. 000

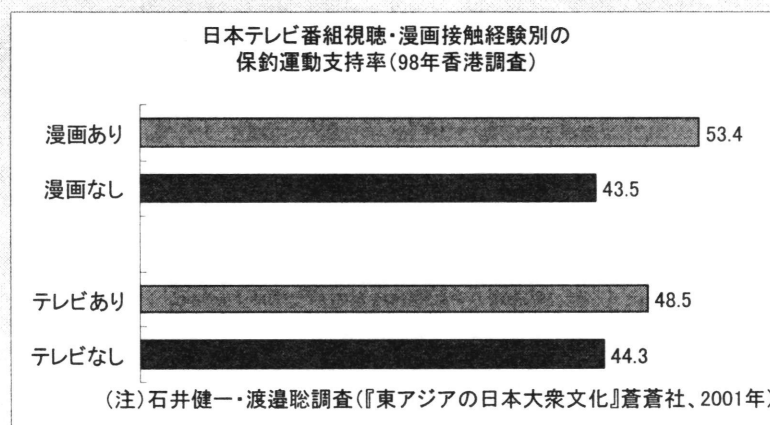
ドラマ視聴と外交(1) →歴史認識問題等との相関関係 04年韓国・中国調査



音楽(J-pop)の場合(02年韓国調査)

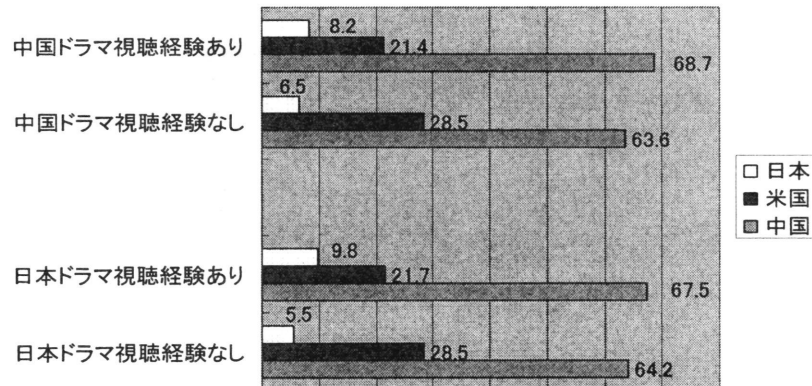


日本のテレビ・漫画と領土問題 (98年香港調査)



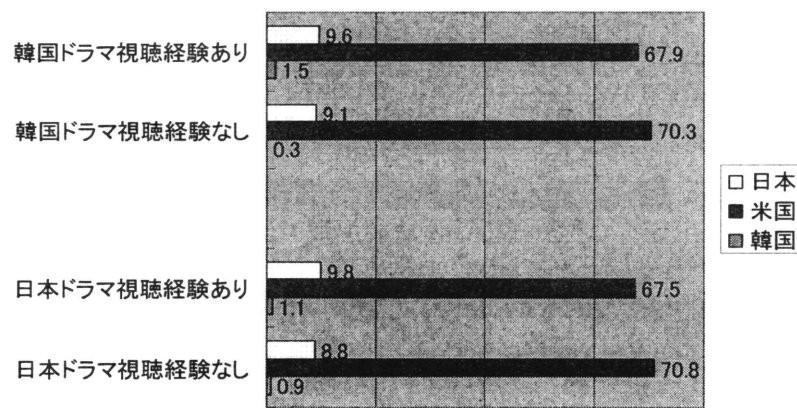
ドラマ視聴と外交(2)
→最も重要な国との相関関係
04年韓国調査

今後、韓国にとって最も重要な国は？(04年韓国調査)



04年中国調査

今後、中国にとって最も重要な国は？(04年中国調査)



Reciprocal Attitudes and Popular Cultural Exchange
in Japan, South Korea and China

日韓中の相互意識と大衆文化交流
—TV드라마を中心に—

Reciprocal Attitudes and Popular Cultural Exchange
in Japan, South Korea and China
—With the Focus on TV Dramas—

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University of Shizuoka

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Dissemination of Popular Culture in East Asia

- 1960s – Across Asia
Dissemination of Japanese animations
- Mid-1980s – Across Asia
“Oshing,” a Japanese NHK TV drama, was popularized
- 1990s – In Taiwan
Japan’s TV programs became big hits amid the emergence of young generation’s “Hari” trend (“Japan craze”)
- 1998– In South Korea
Phased measures implemented to open up to Japan’s popular culture,
“Love Letter,” a Japanese movie, was a hit (1999–2000).
- Around 1999 – In China, Taiwan, Hong Kong
South Korea’s TV dramas became very popular.
- 2003 ~
With the booming popularity of Korean TV dramas such as “Winter Sonata”
of KBS, the “Korean wave” phenomenon emerged, boosted by the huge
following for Yongsama or Bae Yong-Jun that grew in 2004.

From “Japanization” to Mutual Exchanges

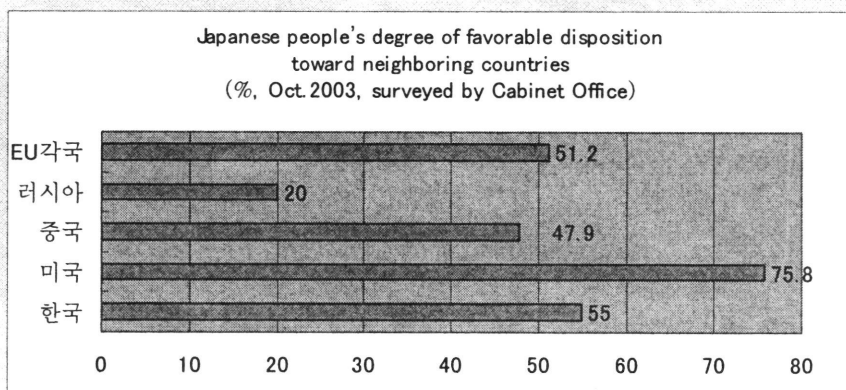
From one-way to two-way exchanges

In Asia, exchanges in popular culture have been transforming from the one-way style, namely, Japan (plus Hong Kong) to other countries, to two-way exchanges

- The *Hanryu* (Korean wave) phenomenon
Since the late 1990s in China, Taiwan, and Hong Kong, Korean TV dramas and music have become increasingly popular, more so than Japanese TV dramas and music.
- ‘*Hanryu*’ phenomenon spreading to Japan
In Japan, the only Asian country exporting popular culture, the popularity of Korean movies, TV dramas, and music has increased. The booming popularity of “Yongsama” and “Winter Sonata,” a Korean TV drama, were the biggest social phenomena of 2004 in Japan.
- In the Philippines, Chinese dramas are gaining popularity (the “*Chinovera*” phenomenon in 2003)
A Taiwanese TV drama titled “Meteor Garden” was popular in the Philippines and the drama was also shown in Japan.

“Opinion Poll on Diplomacy”

Conducted by Japan’s Cabinet Office (Oct.2003)

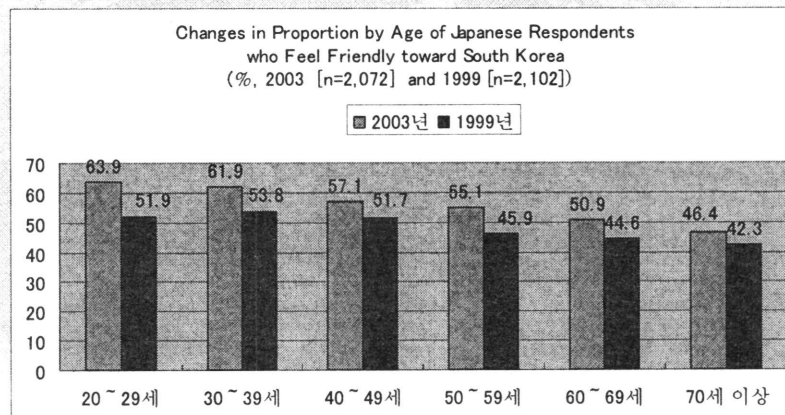


Proportion by Age in the Poll on Japanese People's
Degree of Favorable Disposition toward South Korea,
China and the United States (%)

(Oct.2003, Cabinet Office, "Opinion Poll on Diplomacy", n=2,722)

	All ages	20-29	30-39	40-49	50-59	69-69	Older than 70
U.S.	75.8	75.8	79.5	80.1	77.5	76.6	64.2
China	47.9	49.5	47.4	48.4	48.5	45.7	49.1
S.Korea	55	63.9	61.9	57.1	55.1	50.9	46.4

Changes in Proportion by Age of Japanese
Respondents who Feel Friendly toward South Korea
(1999 and 2003, Cabinet Office, "Opinion Poll on Diplomacy," %)



Research Tasks on Reciprocal Exchanges of Popular Culture

1. What factors determine distribution of popular culture, such as TV dramas, beyond borders?
2. What impact does contact with popular culture of other countries have on the people's awareness, diplomatic perception or attitude toward the other countries? Is there any correlation?
3. Does *Hanryu* (Korean Wave) in China, Hong Kong, and Taiwan as well as Japan, or acceptance of Japanese popular culture in South Korea and China, have correlation with orientation toward the United States and Europe?

Factors Determining Transnational Distribution of Popular Culture

- Political factors
 - Restrictions by the importing country
 - Culture promotion policy of the exporting country
- Economic factors
 - Differences in market size between the exporting country and the importing country
 - Economic level of the importing country
 - The importing country's ability to supply the nation's popular culture
- Social factors
 - People exchanges between the exporting country and the importing country
- Cultural factors
 - Cultural similarity between the exporting country and the importing country
 - Yearning for the exporting country
- Technological factors
 - Advances in information and technology
 - Differences in the quality of production between the exporting country and the importing country

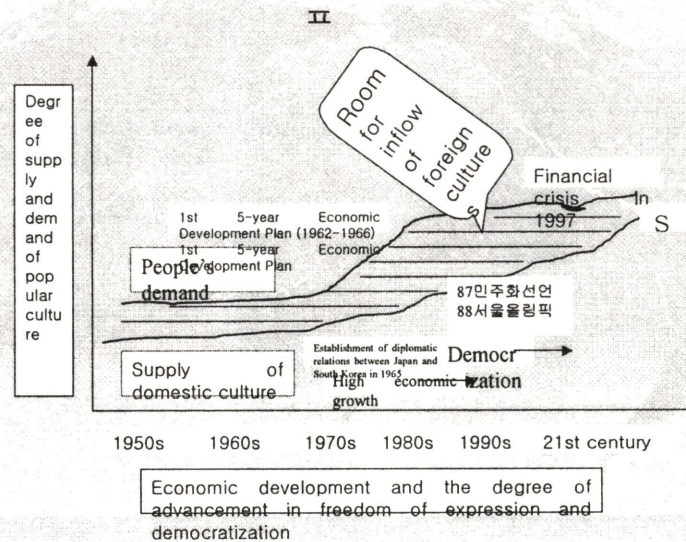
(This has been prepared on the basis of a summary by Ishii Kenichi/ Tsukuba University)

Three Elements Determining the Flow of Culture and Information

1. 'The country's size of domestic market'
The larger the domestic market becomes, the more income can be generated from soft power and the high production cost can be invested.
→ Artistic performances with higher levels of production
2. 'Human capital'
If producers of soft power are not talented and competent, high-quality cultural soft power cannot be produced. The issue is how much appropriate know-how, technology and human resources are available.
3. 'Cultural similarity'
This is the issue of how much similarity of culture exists between cultures of the sending country and the receiving country. The higher "cultural similarity" becomes between the sending country and the accepting country, the easier the culture gets accepted, although it varies depending on contents

Refer to Ishii Kenichi-"International Distribution of Culture and Information," Compiled by Ishii Kenichi 『Japanese Popular Culture in East Asia』 (Sososa, 2001), pp.219-221.

Supply and Demand Balance of Popular Culture and the Room for Inflow of Foreign Cultures (South Korea)

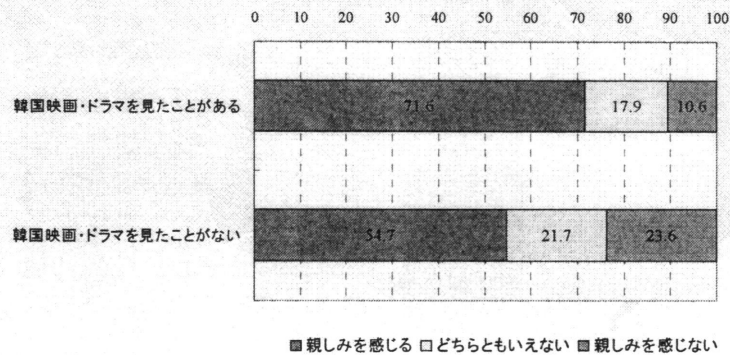


Relationship between Contact with TV Dramas and People's Attitude toward the Country (1)

(Surveys in Japan → toward South Korea)

There is a tendency for people who have contact with the popular culture of another country to display a friendlier attitude toward that country. (e.g. Taipei Survey in 1999, South Korea Survey in 2002, Japan survey in 2002)

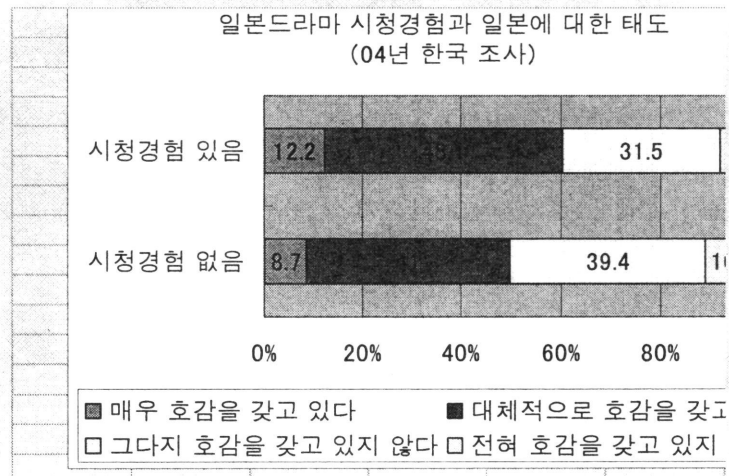
韓国映画・TVドラマの視聴経験と韓国に対する態度 (03年日本調査)



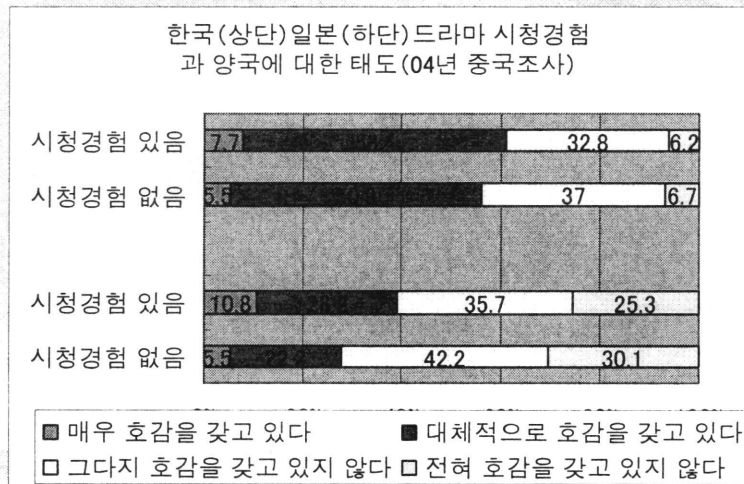
Relationship between Contact with TV Dramas and People's Attitudes toward the Country (2)

(In surveys in South Korea → toward Japan)

일본드라마 시청경험과 일본에 대한 태도 (04년 한국 조사)



Relationship between Contact with TV Dramas and
People's Attitudes toward the Country (3)
(China survey → toward Japan and South Korea)



Contacts with Japanese and South Korean
Dramas and Preferences
(China survey)

1. 'Have watched Japanese dramas' 58.9 %
 'Have watched Korean dramas' 58.8 %

cf. South Korea survey. 'Have watched Japanese dramas' 36.7 %

2. 'Prefer South Korean dramas' 31.1 %
 'Prefer Japanese dramas' 19.3 %
 'Can't say either way' 37.8
 'Do not know' 11.9

Contact with Popular Culture and Feeling Friendly toward the Country

People with contacts with popular culture of
the other country have friendly feelings
toward the country.

Contact with popular culture of the other country'

↑ Correlation ↓

'Friendly feeling toward the country'

Contact with Popular Culture and attitudes toward the country

Based on survey result data introduced here,

"by making contacts with popular culture with the
other country (cause)"



"friendly feelings toward the country have been
generated" (result).

It cannot be simply concluded as above.

∴ There is a possibility that in the first place people who have
already had friendly feelings toward the other country (cause)
show a strong tendency to make contacts with popular culture
of the country (result).

**Correlation between Contact with Japanese Popular Culture and Friendly
Attitude in the Context of the South Korean Situation**

The South Korean Situation

1. Anti-Japanese ideology has determined attitudes and ways of thinking of the people for a long time.
2. Japanese popular culture has been accepted in the form of "prohibition in principle, opening in reality."

When 1 and 2 are considered together,

"Friendly attitude toward Japan" (cause)
↓
"Contact with Japanese popular culture" (result)

The above correlation is deemed less valid than the following correlation:

"Contact with Japanese popular culture" (cause)
↓
"Friendly attitude toward Japan" (result)

**Correlation between Contact with South Korean Popular Culture
and Friendly Attitude in the Context of China's Situation**

China's situation

1. China's relations with South Korea had been closed for a long time, until the 1992 diplomatic normalization between the two countries.
2. Chinese people's friendly feelings toward South Korea are higher than those toward Japan or the United States.

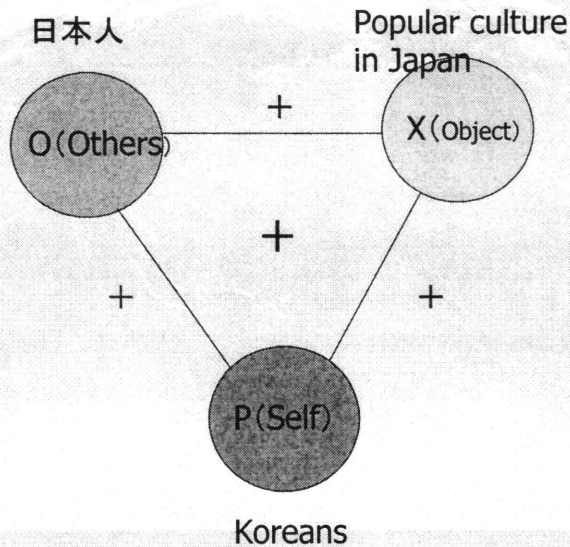
1
When 1 and 2 are considered together,

"Friendly attitude toward South Korea" (cause)
↓
"Contact with South Korean popular culture" (result)

The above correlation is deemed less valid than the following correlation.

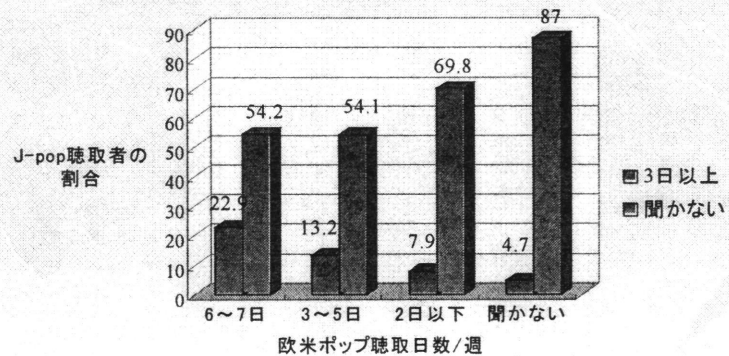
"Contact with South Korean popular culture" (cause)
↓
"Friendly attitude toward South Korea" (result)

Explanation through Balance Theory (Cognitive Balance Theory)



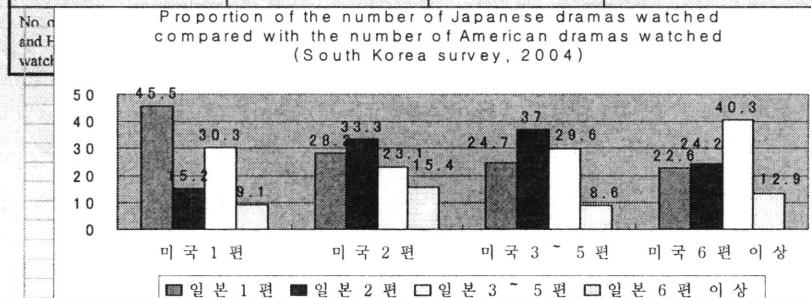
Difference between Contact with Japanese Popular Culture in South Korea and *Hanryu* in Japan (1)

South Korean people making contact with Japanese popular culture are in fact the people making active contacts with American popular culture South ⇒ overlapping of orientation of J-pop and American with pop music (韓国調査)
欧米ポップ聴取日数/週



However, Is There No Correlation in the Case of TV Dramas?
(South Korea survey, 2004)

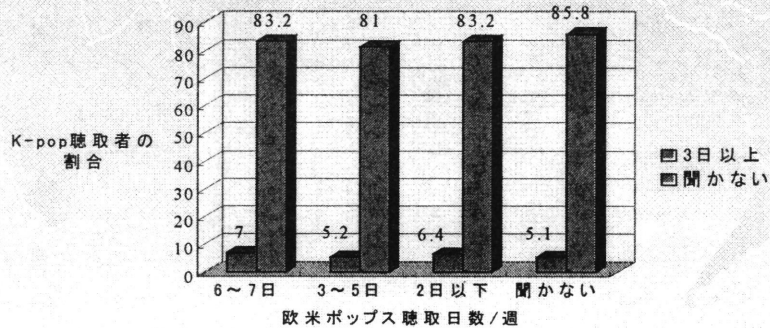
	No. of American dramas watched	No. of Japanese dramas watched	No. of Chinese, Taiwanese, and Hong Kong dramas watched
No. of American dramas watched	1,000	.442	.621
No. of Japanese dramas watched	.442	1,000	.398



Difference between Japanization of Asia
and *Hanryu* in Japan (2)

In the *Hanryu* phenomenon in Japan, there was no tendency found that people with more frequent contact with American popular culture have more frequent contact with South Korean popular culture.

欧米ポップスの聴取日数別にみたK-pop聴取者の割合
(03日本調査)



South Korean and Japanese Dramas in China (2004 China survey)

(04년 중국조사)

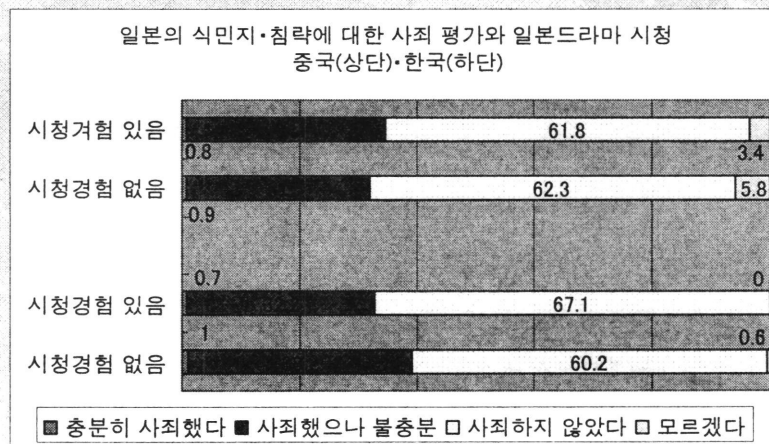
Coefficient of correlation between numbers of dramas of different countries watched (China survey, 2004)

→Viewers of South Korean and Japanese dramas are relatively overlapped.

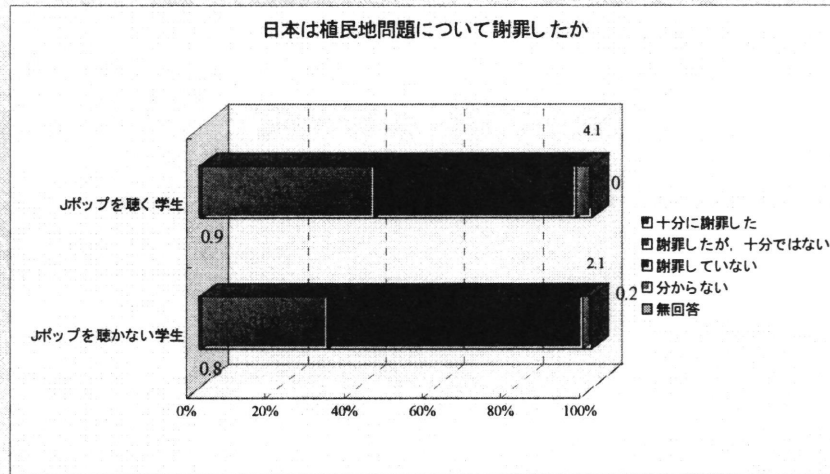
	No. of American dramas watched	No. of Japanese dramas watched	No. of South Korean dramas watched
No. of American dramas watched	1. 000	. 155	. 184
No. of Japanese dramas watched	. 155	1. 000	. 449
No. of South Korean dramas watched	. 184	. 449	1. 000

Watching Dramas and Diplomacy (1)

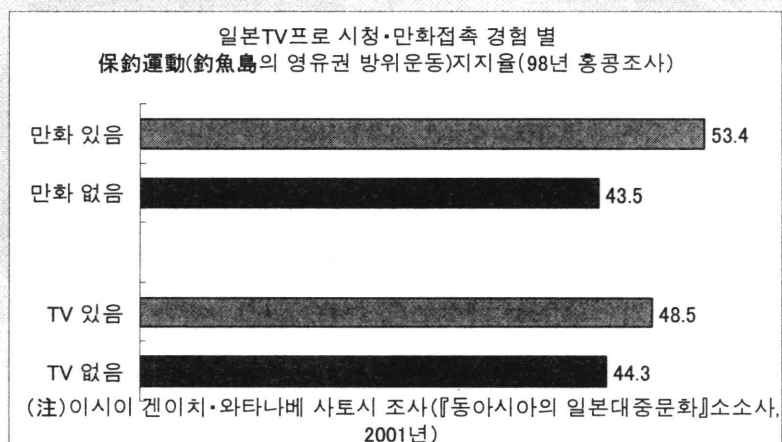
→Correlation with the issue of perception of history
2004 South Korea and China surveys



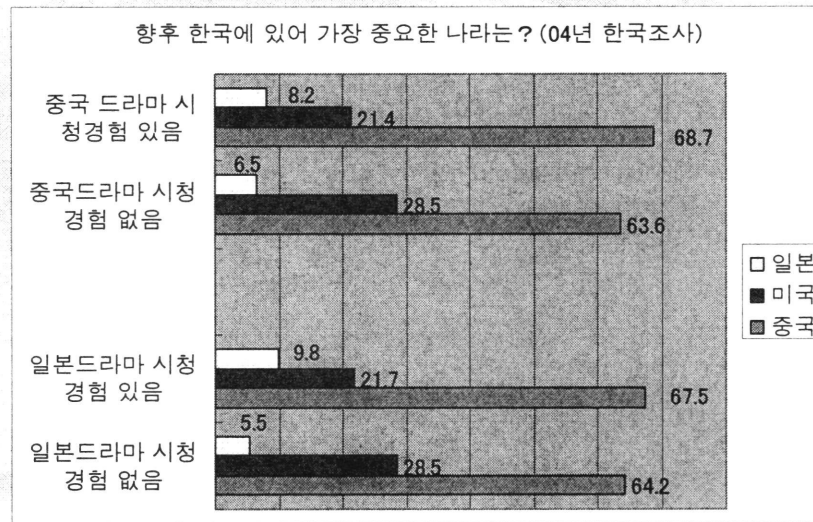
In the Case of Music (Japanese Pop Music) (2004 South Korea survey)



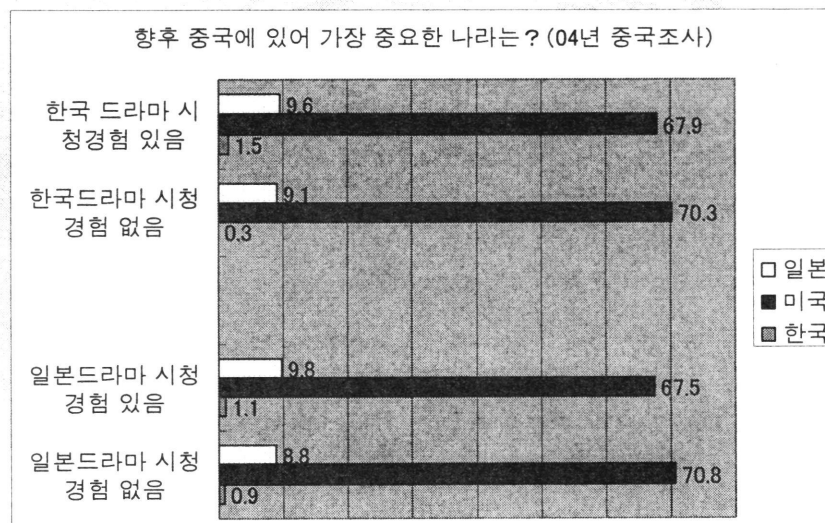
Japanese TV Programs/Animations and Territorial Issue (1998 Hong Kong survey)



Watching Dramas and Diplomacy (2)
 →Correlation with the Most Important Country
 (2004 South Korea survey)



2004 China Survey



Criticism of "Japanization" *

- New cultural aggression, cultural dominance
Concern about the ongoing (cultural) influence of the former colonial power
- Criticism of cultural imperialism
Regarding popular culture as advance guard of materialism, consumption-oriented culture and capitalism

* Japanization refers to the phenomenon of distribution of Japanese popular culture in Asia since the late 1980s and especially in the 1990s

cf. Americanization

'Soft Power'

- What is soft power? It refers to an ability to achieve desired results not by coercion or rewards but by attracting and persuading others. Soft power sprouts through the country's culture, political visions, and attraction of policy.
- It is wrong to belittle popular culture, because there are many cases where popular culture delivers images and messages on one's value system, which has an important political influence such as individualism and choice of consumers in the form of unconsciousness
- → Japanization, Hanryu
Nye, Joseph S. Jr. Soft Power: The Means to Success in World Politics. New York, NY: Public Affairs, 2004.

Cooperators

WATANABE Satoshi, Professor, Univ. of Shizuoka

静岡県立大学 教授 渡邊 聡

ISHII Kenichi, Associate Professor, Tsukuba University

筑波大学 助教授 石井健一

Reciprocal Attitudes And Popular Cultural Exchanges

in Japan, South Korea and China

日韓中の相互意識と大衆文化交流

End 終 끝

KOHARI Susumu 小針 進 고하리 스스무

**The reciprocal attitudes and popular cultural exchange
in Japan, South Korea and China**

日韓中の相互意識と大衆文化交流
-TV드라마を中心に-

일.한.중 상호의식과 대중문화교류
-TV 드라마를 중심으로-

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동아시아에서 대중문화의 파급

- 1960년대~ 아시아 각지
일본 애니메이션의 보급
- 1980년대 중반 아시아 각지
NHK드라마 '오상'의 유행
- 1990년대 타이완
일본의 TV프로그가 큰 인기, '합일족(哈日族)' 출현
- 1998년~ 한국
일본대중문화 단계적 개방조치, 영화 'Love Letter' 등 히트(99-2000년)
- 1999년 전후~ 중국·타이완·홍콩
한국의 TV드라마가 큰 인기
- 2003년~
KBS드라마 '겨울연가' 등 한국 드라마 붐 '용사마'현상(2004년)

Japanization(일본화)에서 상호교류로

‘한 방향’에서 ‘상호교류’로

아시아 역내에서 대중문화의 교류가 ‘일본(+홍콩)’⇒ ‘기타 국가’라는 한 방향에서 ‘상호교류’로 변화하고 있다.

▪ ‘한류’ 현상

90년대 말부터 중국·타이완·홍콩에서는 일본의 TV드라마·음악 대신 한국의 TV드라마·음악이 인기를 끌게 된다.

▪ ‘한류’는 일본에도

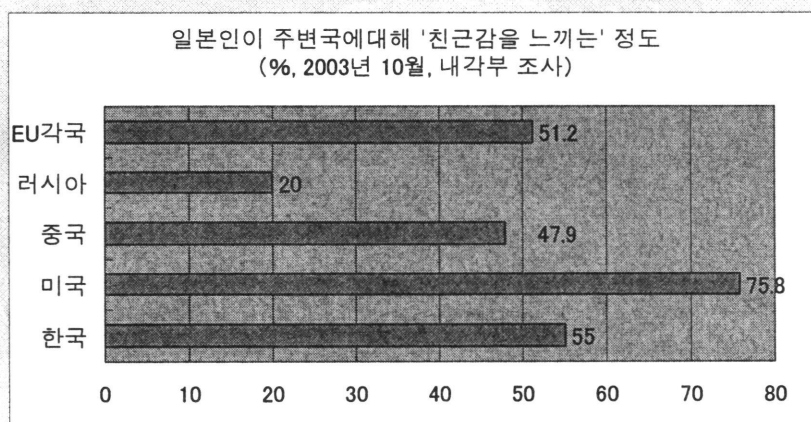
지금까지 아시아에서는 오직 대중문화 수출국이었던 일본에서 한국의 영화, TV드라마, 음악에 대한 인기 고조. ‘겨울연가’ 붐과 ‘용사마’ 인기는 2004년 일본의 일대 사회현상화.

▪ 필리핀에서 중국어드라마 유행(2003년, ‘치노베라’ 현상)

타이완 TV드라마 ‘流星花園(유성화원, 꽃보다 남자)’이 필리핀에서 인기. 일본에서도 방영.

내각부 ‘외교에 관한 여론조사’(2003년10월)

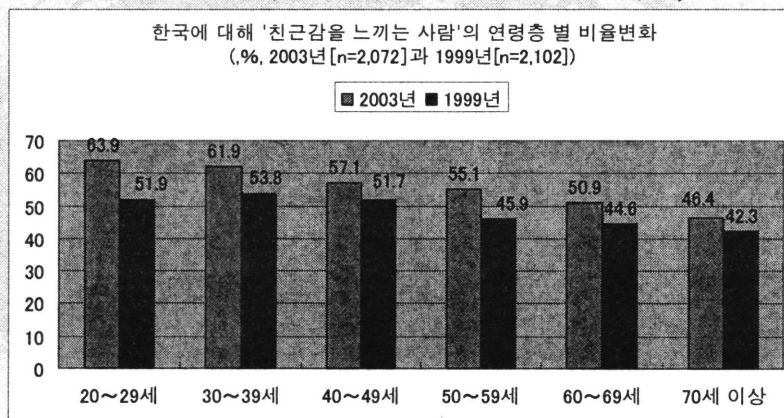
일본인이 주변국에 대해 ‘친근감을 느끼는’ 정도
(%, 2003년 10월, 내각부 조사)



일본인이 한·중·미에 대해 ‘친근감을 느낀다’고 답한
연령층 별 비율(%)
(2003년 10월, 내각부 ‘외교에 관한 여론조사’, n=2,722)

	전 연령	20-29세	30-39세	40-49세	50-59세	69-69세	70세 이상
대 미국	75.8	75.8	79.5	80.1	77.5	76.6	64.2
대 중국	47.9	49.5	47.4	48.4	48.5	45.7	49.1
대 한국	55	63.9	61.9	57.1	55.1	50.9	46.4

일본인이 한국에 대해 ‘친근감을 느낀다’고 답한
연령층 별 비율변화
(1999년과 2003년, 내각부 ‘외교에 관한 여론조사’, %)



대중문화의 상호교류에 관한 연구과제

1. 어떠한 요인이 TV드라마 등 대중문화의 국경을 초월한 유통을 규정하고 있는가?
2. 타국의 대중문화에 대한 접촉은 그 나라에 대한 의식, 외교적 인식이나 태도에 어떠한 영향을 미치는가? 상관관계가 있는가?
3. 일본과 중화권의 한류나 한국과 중국에서의 일본 대중문화 수용은 구미 지향 등과 상관관계가 있는가?

대중문화의 국경을 초월한 유통을 규정하는 요인

- 정치적 요인
수입국의 규제
수출국의 촉진정책
- 경제적 요인
수출국과 수입국의 시장규모 차이
수입국의 경제 수준
수입국의 국산 대중문화 공급능력
- 사회적 용인
수출국과 수입국의 인적 교류
- 문화적 요인
수출국과 수입국의 문화적 유사성
수출국에 대한 동경
- 기술적 요인
정보기술의 발전
수출국과 수입국의 제작수준 차이

(이시이 겐이치·쓰쿠바대학의 정리를 참고로 작성함)

문화·정보의 흐름을 결정하는 3요소

1. '국내의 시장규모'

국가 규모가 클수록 한 가지 소프트에서 많은 수입을 얻을 수 있으며, 그만큼 높은 제작비를 투입할 수 있다→제작수준이 높은 작품

2. '인적 자본'

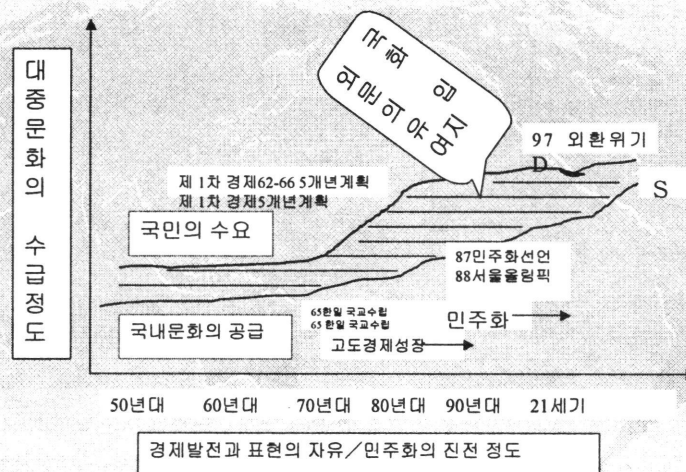
소프트 제작자가 우수하지 않으면 높은 수준의 소프트는 만들어지지 않는다. 노하우, 기술, 센스 있는 인재가 얼마나 있는가

3. '문화적 유사성'

수용자와 발신자 측 문화에 어느 정도 유사성이 있는지의 문제이다. 이것은 콘텐츠에 따라 다르지만, 발신국과 수용국의 '문화적 유사성'이 높을수록 받아들이기 쉽다.

이시이 겐이치 '문화와 정보의 국제유통', 이시이 겐이치 편 『동아시아의 일본대중문화』(蒼蒼社, 2001년), 219-221페이지 참조.

대중문화의 수요 밸런스와 외국문화의 유입 여지(한국)



한·중·일 주요도시에서 사회조사 실시

조사대상: 일본 조사~도쿄와 시즈오카에서 694명(대학생만)

한국 조사~서울시민 803명(18~60세)

중국 조사~상하이시민 800명(18~60세)

실시시기: 일본 조사~ 2003년 12월~2004년 1월

한국·중국 조사~2004년 9월

조사방법: 일본 조사~자기 기입식 질문표 조사(집합조사법)

한국 조사~전화조사

중국 조사~가두면접조사

조사내용: 외국 대중문화 접촉 상황,
외국에 대한 관심, 외국에 대한 친근감,
국수주의 의식, 일본에 대한 의식
아시아에 대한 의식, 구미에 대한 의식 등

각국 조사에서 주변국에대한 '호감도'의 비율(%)

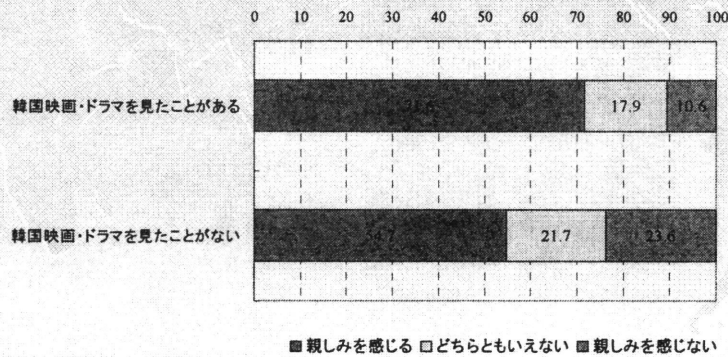
	대 한국	대 일본	대 미국	대 중국	대 러시아	대 북한
일본 조사	66.1	—	53.1	43.1	9.8	4.6
한국 조사	—	53.6	55.5	68.8	43.7	62.8
중국 조사	59.1	34.4	51.1	—	67.9	34.6

TV드라마 접촉과 그 나라에 대한 태도의 관계(1) (일본조사→대 한국)

한 나라의 대중문화를 접촉한 사람이 그 나라에 대해 호의적인 태도를 보이는 경향이 있다.

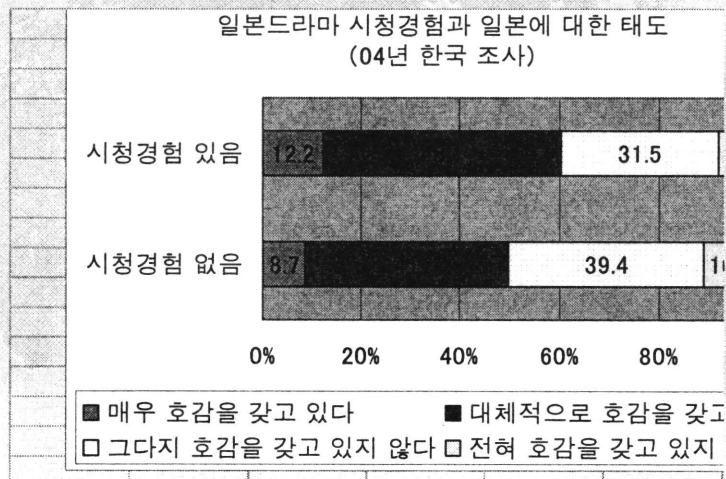
(eg. 99타이페이 조사, 02한국조사, 02일본조사)

韓国映画・TVドラマの視聴経験と韓国に対する態度(03年日本調査)



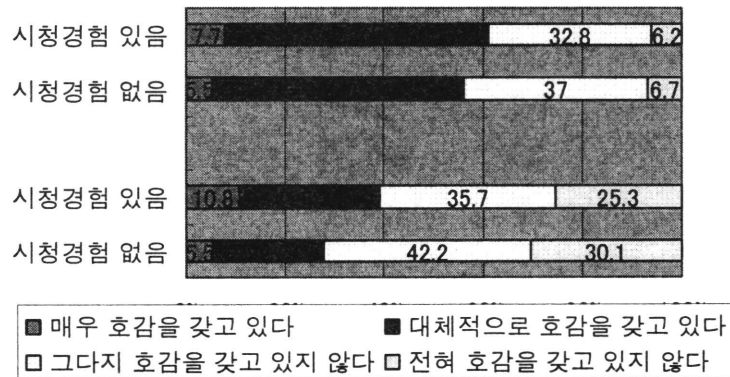
TV드라마 접촉과 그 나라에 대한 태도의 관계(2) (한국조사→대 일본)

일본드라마 시청경험과 일본에 대한 태도
(04년 한국 조사)



TV드라마 접촉과 그 나라에 대한 태도의 관계(3) (중국 조사→대 일본·한국)

한국(상단)일본(하단)드라마 시청경험
과 양국에 대한 태도(04년 중국조사)



일본 드라마와 한국 드라마 접촉과 선호도 (중국 조사)

1. '일본 드라마를 본 적이 있다' 58.9%
'한국 드라마를 본 적이 있다' 58.8%

cf. 한국조사: '일본 드라마를 본 적이 있다' 36.7%

2. '한국 드라마를 더 좋아한다' 31.1%
'일본 드라마를 더 좋아한다' 19.3%
'어느 쪽이라고 말할 수 없다' 37.8%
'잘 모르겠다' 11.9%

대중문화 접촉과 상대국에 대한 친근감

상대국의 대중문화에 접촉한 사람이 상대국에 대해 친근감을 갖고 있다.

'상대국의 대중문화 접촉'

↑ 상관계 ↓

'상대국에 대한 친근감'

대중문화 접촉과 상대국에 대한 태도

이번에 소개한 조사결과 데이터를 토대로

'상대국의 대중문화에 접촉함으로써'(원인)

↓

'상대국에 대해 친근감을 갖게 되었다'(결과)

라고 간단히 결론지을 수는 없다.

∴ 처음부터 상대국에 친근감을 갖고 있는 사람
(원인)일수록 상대국의 대중문화에 접촉하는
경향이 강한(결과)것일지도 모른다.

한국의 상황을 생각한 경우 일본 대중문화 접촉과 호의적인 태도와의 관계
한국의 상황

- 1 오랫동안 반일적 이데올로기가 사람들의 태도와 사고를 규정해 왔다.
 - 2 일본의 대중문화가 '원칙 금지, 실제 개방'이라는 형태로 수용되어 왔다.
- 위 1, 2를 합쳐 생각해 보면,

'일본에 대한 호의적인 태도'(원인)
↓
'일본 대중문화에 접촉'(결과)

라는 인과관계보다는

'일본의 대중문화에 접촉'(원인)
↓
'일본에 대한 호의적인 태도'(결과)

라는 관계 쪽이 타당성이 높은 것으로 생각된다.

중국의 상황을 생각한 경우 한국 대중문화 접촉과 호의적인 태도와의 관계
중국의 상황

- 1 1992년 한중 국교수교 이전까지 오랫동안 한국과의 관계가 달혀 있었다.
 - 2 한국에 대한 호감도가 대일·대미보다 높다.
- 위 1, 2를 합쳐 생각해 보면,

'한국에 대한 호의적인 태도'(원인)
↓
'한국의 대중문화에 접촉'(결과)

이라는 인과관계보다는

'한국의 대중문화에 접촉'(원인)
↓
'한국에 대한 호의적인 태도'(결과)

이라는 관계 쪽이 타당성이 높은 것으로 생각된다.

映畫

Film

아시아 각국의 영화시장 현황과 아시아영상문화산업 네트워크 구축을 위한 방안

-김형준(한국영화제작가협회 회장)-

차례

I. 아시아 각국의 영화시장 현황

1. 한국
2. 일본
3. 중국
4. 홍콩
5. 대만
6. 동남아

II. 아시아영상문화산업 네트워크 구축을 위한 방안

1. 아시아네트워크 사전단계로서 아시아 국가 간 영상문화 교류 활성화 필요
2. 아시아네트워크를 통해 추진 가능한 공동 사업
3. 아시아네트워크의 추진방식
4. 아시아 지역의 문화소비 성향 조사·분석 연구 협력시스템 구축
5. 아시아 공동제작·공동 마케팅 지원을 위한 아시아 영상 공동투자조합 결성

I. 아시아 각국의 영화시장 현황

1. 한국

○ 현황

-연간 관객수 약 1억2천만 명(2003), 연간 영화시장 규모 7,171억원(2003년, 한국영화 3,822억원, 외국영화 3,348억원), 2000년 이후 한국영화 평균 제작편수 67편(2000-58편, 2001-52편, 2002-78편, 2003-80편), 1인당 평균 관람횟수 2.2회, 한국영화 1.7회(2002년)

<표1> 연도별 전국 관객점유율 (%)

연도	한국영화	외국영화	계
2001	50.1	49.9	100
2002	48.3	51.7	100
2003	53.5	46.5	100

(출처: 영진위 자료, 2003 한국영화산업 전국통계)

- 전국 극장수 280관, 스크린 수 1,132개 (2004년 현재)

<표2> 연도별 전국 상영관 현황

연도	극장수	스크린수	좌석수	멀티플렉스* 스크린수(%)
2001	344	818	239,068	168(20.5)
2002	309	977	240,652	432(44.2)
2003	280	1,132	256,474	595(52.6)

(출처: 영진위 자료, 2003 한국영화산업 전국통계)

○ 긍정적 동향

- 산업성장률 최근 5년간 14.6%, 특히 한국과 아시아에서 할리우드 영화와 대등한 상업적 경쟁력을 보여줌으로써 아시아영화산업네트워크 구축을 선도할 가능성 제시
- 국내 메이저에 대한 외국인 투자 활발- 영화, 방송, 음반, 게임, 애니메이션, 캐릭터 분야 등 영상문화산업의 경제성장률은 1999년 이후 2002년까지 한국경제성장률 6.1%의 3.5배인 21.1%의 성장세(2003년 시장규모 19조원 예측)
- 한국형 메이저 출현과 기업 경쟁력 강화, 투자 자본의 안정화, 고급 인력의 지속적 유입

○ 부정적 동향

- 양적 성장과 질적 성장의 부조화
- 50% 내외의 한국영화 점유율과 상반적으로 2002년 한국영화 투자 부문에서 -10.7%의 적자 수익률로 수익성 문제 대두
- 한국영화뿐 아니라 미국영화의 관객도 증가하는 상황에서 미국영화의 수익성이 더 높음
- 국제적 시각에서 볼 때 영화산업 자본 축적 영세, 불안정
- 한미투자협정(BIT) 관련 미국의 스크린쿼터 축소 및 폐지 압력 강화

○ 과제

- 수익성 저조와 다양성 부족
- 유통환경 개선 필요
- 디지털시네마 환경에 대응한 기술과 해외 마케팅 부분 국제 경쟁력 강화 필요
- 지방자치단체 진흥사업과 연계성 강화 필요
- 스크린쿼터 축소 요구, 시장개방 압력에 효과적인 대응 필요
- 아시아지역 산업/문화 교류, 협력 주도할 적극성 필요

2. 일본¹⁾

- 연간 관객수 약 1억 6,234만명 (2002년 1억 6076만명), 2001년에 15년만에 1억 6천만 명대로 진입, 흥행수입 2032억 5900만 엔(2002년 1967억 8천만 엔), 2001년에 일본영화사상 처음으로 2천억 엔 돌파,

1) 일본영화시장의 특징은 상세한 설명을 요하므로 여기에서는 2003년의 시장 통계만 제시.

- 일본영화시장점유율 (2001년 39%, 2002년 27%), 외국영화점유율 (2001년 61%, 2002년 72.9%)
- 상위 흥행작에서 애니메이션이 차지하는 비중이 아직 높지만 실사영화의 흥행이 점차 부상하고 있음(<춤추는 대수사선1,2>, <환생>, <자토이치> 등)
- 전국 스크린수 2,681개 (2002년 2,645개) (2003년 멀티플렉스 점유율 57%), 쇼치쿠, 도호, 도에이 3대 메이저의 지속적인 멀티플렉스 경쟁 강화, 계열배급의 강화와 함께 독립프로덕션의 배급에도 기여

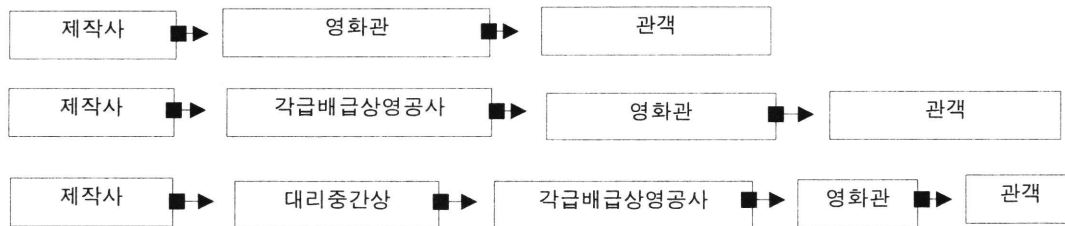
3. 중국

- 연간 관객수 약 7억명(2002), 연간 영화시장 규모 한화 약 1,530억원(2000), 극영화 제작편수 83편(2000)에서 최근 자국영화 제작편수 증가 추세(2004년, 200여편 예상)
- 이전에 정부가 모든 영화를 제작, 배급, 상영하던 계획경제 시스템에서 탈피, 정부의 직접 투자는 줄어들고 민간자본의 투자 및 할리우드 자본 유입 증가
- 대외적으로 공표되는 중국의 자국영화점유율은 50% 이상, 미국영화 점유율은 약 38%이나 실제로 자국영화 점유율은 50% 이하일 것으로 추정.
- 스크린당 연간 상영편수의 2/3 이상을 자국영화로 채워야 한다는 규정과 분장제 수입영화를 연간 20편으로 묶어 놓은 수입쿼터가 최근 완화되고 있음
- WTO 가입 이후 분장제 수입영화 2005년까지 50편으로 확대 예정이며, 2003년 7월부터 화시아공사에 외화배급권을 부여, <터미네이터2>로 배급을 시작함으로써 그간 중국전영집단이 가지고 있던 외화배급 독점 체제가 깨짐.
- 영화방면 총괄기관은 국무원 직속기구 중의 하나인 국가광과전영전시총국(國家廣播電影電視總局, 국무원 직속 기구)임.
- 매년 생산수량 국가가 지정→ 16개 국가 직영제편창 제작→중영공사에서 구매→성, 시 배급공사가 배급→상영하는 배급, 상영 관리체제를 오랫동안 유지함. 80년대 들어서 관객수가 급감하면서 제편창들도 상업영화를 제작하기 시작, 민간영화사와 프로듀서 등장(그러나 천안문 사건 이후 제편창들이 주선율영화(이데올로기 영화)에 주력하면서 영화시장이 하락추세를 보였음)
- 2000년대에 접어들어 제편창들이 집단화, 주식회사화, 사업다변화 등을 통해 개혁을 모색, 평샤오강 등 흥행영화 감독들이 등장, 장이모우의 <영웅>등이 흥행에 성공하면서 활기를 되찾는 추세
- 주로 매단제(買斷制)와 분장제(分帳制) 방식으로 배급이 이루어짐.

* 매단제: 제작 주체가 배급권을 팔고 난 후 흥행수익에는 어떤 권리도 주장할 수 없는 방식. 즉 영화를 어떤 지역, 어떤 시기에 배급권을 배급 중개상에 파는 것.

* 분장제: 영화 판권을 가진 자가 배급권을 팔지 않고, 배급을 위탁하여 사전에 협약된 바에 의거하여 흥행 수익을 제작, 배급, 상영 주체가 나누어 갖는 배급 방식.

<그림1> 영화제작사(제편창 및 민간영화사)의 영화배급경로(1993년 이후~)



- 11,000여개의 상영단위가 있으며, 영화전문 상영관은 7,592곳임(2001년 기준)
- 중국의 지역별로 분할 상영 시스템인 원선제의 한계를 극복하기 위해 지역을 넘어서는 원선 건설 추진 중

* 원선제(院線制): 일종의 독점적 경영시스템으로 경영자가 일정한 성시와 지역에 상당한 수량의 영화관을 갖고 상영망을 건립한 후 특정 국가 혹은 영화 제작사의 새 영화 상영권을 독점하는 것.

- 극장 전산망 구축은 거의 완비된 상태이며 외자극장이 증가하고 있는 추세
- 관람료는 매우 비싼 편으로 베이징, 상하이 등 대도시 30위엔(4,800원), 광둥성 20위엔(3,200원), 스촨안성 17위엔(2,700원) 등으로 지정 가격이 지역별로 정해져 있으나 시설이 좋은 최신 극장은 100위엔(16,000원) 이상
- 분장제 수입영화의 경우 외국측이 가져갈 수 있는 비율은 전체 수익의 13% 내외.
- 미국의 대중 전략은 매우 주도적이고 장기적인 관점에서 이루어지고 있으며, 평샤오강의 <대가의 장례식 大腕>, 장이모우의 <영웅> 등은 모두 콜럼비아의 자본으로 만들어짐 - 워너브라더스, 디즈니 중국사무소 개설, 시장 리서치 실시, 영화관 투자, 자체 원선 건설 추진, 인재 관리(사전제작비 지급)

4. 홍콩

- 연간 제작편수 92편(2002), 시장규모 약 1,500억원, 관객수 1,860만명(2002), 스크린 184개(2002), 자국영화점유율 47%(2001)²⁾
- 1989년-1993년 4년간 호황을 누렸으나 이후 경제위기와 함께 영화산업이 침체. 2000년 들어 제작편수가 증가하고 영화계 유입 자본(주로 IT업계)이 증가하면서 영화산업이 회복 추세. 정부와 민간단체의 적극적인 구조조정 노력의 결실로 불법 복제판 단속이 자리를 잡아가고 있으며 필름마트 개최를 통한 중국본토 창구 역할 마련, 북미시장 등 적극적인 대외 진출(홍콩영화의 해외시장 의존도 70% 이상), 국제적인 제작과 배급 등을 통해 영화산업의 부흥에 힘씀.

2) 관객, 스크린수, 자국영화점유율 www.screendigest.com

- 지난 7월 중국과 홍콩 간에 '경제무역협력강화협정(CEPA)'이 맺어지면서 그간 대륙에서 외국영화로 취급받았던 홍콩영화가 2004년부터 국산영화 인정을 받게 됨. 이로써 중국 대륙시장에 접근할 가능성이 높아짐.

5. 대만

- 연간 제작편수 20편 이하(1/3 미개봉), 관객 1,970만명, 스크린수 669개³⁾, 타이베이 시장 규모 약 1,000억원
- 할리우드 영화의 점유율 95% 이상, 나머지는 홍콩영화이며, 대만영화의 점유율은 0.1%(2001), 2.2%(2002)로 자국영화시장이 거의 침체.
- 영화관보다는 CATV 등(영화채널 수십 개)에서 영화 시청
- 정부 보조금 정책-현재 연간 12억원 예산으로 10-15편 영화에 제작비 지원을 실시하고 있으나 실효성에 대한 문제제기가 있고 정부 차원에서 영화 정책 개선안을 모색 중
- 장기적인 영화산업 침체로 전문인력 부족
- 대형 영화사의 배급/상영의 수직계열화(제작, 수입, 배급을 겸하고 극장, CATV 소유)
- 와이드 릴리즈와 단관개봉 : 대형 제작, 배급사를 통한 20개관 이상 동시개봉의 와이드릴리즈가 주류(일부 감독들이 단관개봉을 통해 영화를 선보이는 경우가 늘고 있음)
- 할리우드 영화의 절대적인 우위 : 1997년 두 차례에 걸쳐 수입쿼터 대폭 완화. 6월 1일, 편당 수입 프린트 숫자를 31개에서 38개로, 11월 20일 다시 50개로 늘림. 동시에 한 도시에서 상영할 수 있는 영화관의 숫자를 11개에서 18개로 늘렸으며 한 영화관에서 3개 스크린에 동시에 한 영화를 걸 수 있는 조치를 취함. 이후 할리우드 영화가 영화관을 장악하게 됨.

3) 관객, 스크린수 www.screendigest.com

6. 동남아

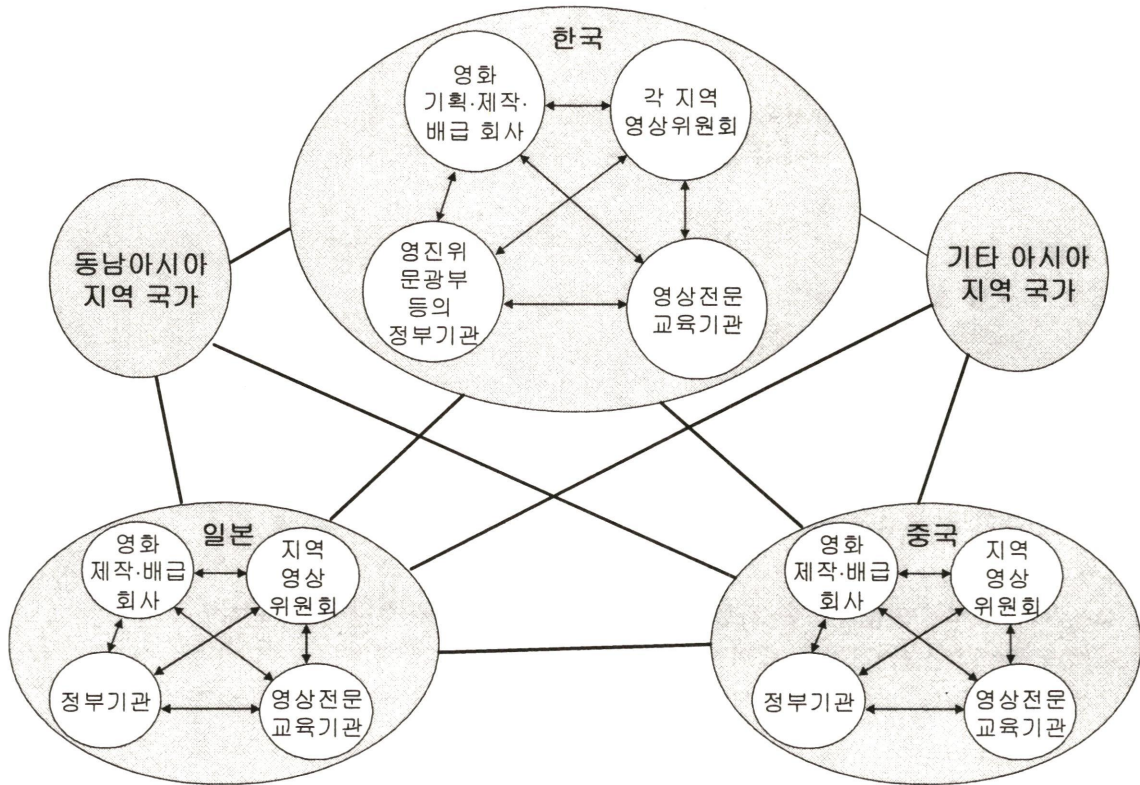
<표3> 동남아 국가 영화산업 현황

국가명	시장규모(원)	연간관객수(명)	스크린수(개)	시장특징
태국	972억	2,880만(2002)	465(2002)	-2002년 제작편수 25편 -방콕 등 주요도시 외 지역은 단매배급 -미국영화 점유율 80% -후반작업 경쟁력 강한 프린트보급기지
말레이시아	240억	1,020만(2002)	310(2000)	-2002년 제작편수 9편 -미국영화 점유율 60%
인도네시아	504억	1억4,600만(2002)	850(2002)	-연간 제작편수 2-3편 -할리우드영화와 중국영화 점유율 2/3 이상 -TV와 DVD 강세 -섬국가로 동시개봉 불가능, 수도 자카르타 소재한 자바섬에서 먼저 개봉. -멀티플렉스 개조 활발
싱가포르	696억원	1,430만(2001)	139(2002)	-연간 제작편수 5-8편 -미국직배사가 배급망 장악, 자국 배급사 없음 -수입영화 중 미국과 인도영화가 40%

(출처: 한미투자협정과 스크린쿼터(영진위, 2003), 아시아 영화네트워크 구축을 위한 기초조사(영진위, 2002), focus2003(Marché du Film, 2003), Cinemagoing Asia Pacific(Dodona Research, 2001), www.screendigest.com)

II. 아시아 영상문화산업 네트워크 구축을 위한 방안

<그림2> 아시아 영상문화산업 네트워크 구축 모델



1. 아시아네트워크 사전단계로서 아시아 국가 간 영상문화 교류 활성화 필요

1) 준비 현황

- 정부 차원에서 아시아 문화 포럼 등이 이루어지고 있음
- AFCN과 AFIN이 결성되어 있음

2) 과제

- 산업이나 로케이션 지원 이외에도 영상전문 교육기관 간의 학생 및 연구인력 교류 활성화와 이를 제도화하기 위한 네트워크 구성 필요
- 기본적인 구조는 아시아 지역별 문화적 공유가 큰 지역별 공동 제작 및 투자구조 마련.
 - ① 한·중·일 공동제작과 공동투자펀드 결성
 - ② 한·중·일 영상문화 교육기관간의 교류
 - ③ 상호 지역의 로케이션 활성화를 위한 지원시스템 구축(아시아 역내 국가간 로케이션 지원 시 내국민과 동일한 대우, 역내 로케이션 가능 및 활성화 대상 지역에 대한 정보

인프라 구축 등)

- 아시아 지역 국가 중 영상문화 제작여건이 활성화된 국가가 아직 미비한 국가의 지원을 통한 영상 제작 활성화와 상호 교류 증진

2. 아시아네트워크를 통해 추진 가능한 공동 사업

- 목표 : 지역 내 문화교류와 영상산업 발전
- 추진 방식 : 낮은 단계에서 높은 단계로 차근차근

1) 정보제공

- 조사, 연구를 통한 다양하고 풍부한 정보 제공
 - 출판, 인터넷 등 매체 활용
 - 세미나, 교육
- 각국의 산업현황과 영화관련 서비스 현황을 소상하게 소개
- 인력의 전문성을 향상시키고, 필름커미션 등 지원 서비스의 질적 향상을 도모함
- 각국 진흥기구 설립을 촉진시킴

2) 상호간의 로케이션·제작·기술 관련 용역 제공을 통한 고용 확대와 부가가치 창출

- 각국 투입요소의 점검과 개선
- 각국이 비교우위를 확보한 투입요소의 공조효과를 통한 아시아 영상물의 경쟁력 강화

<표4> 각 국의 경쟁력 요소 점검사항과 평가표

항목		중국	홍콩	대만	일본	호주	태국	한국
공간환경 (로케이션)	자연풍광	○	×	△	○	○	○	△
	도시	△	◎	×	○	○	△	△
제작인력		가) △*	○	×	△*	○	○	△
기술서비스		×	△	×	○	○	○	△
산업경쟁력		×	△	×	○	○	△	△
행정서비스 (부패지수)		△	○	×	○	○	×	△
지원책의 내국민대우 (National Treatment)		×	×	×	×	○	×	△

* 중국과 일본의 제작인력 중에서 미술, 소품 분야의 능력은 상당히 뛰어남

<표 5> 아시아 각국의 주요 현황

구분	중국	홍콩	대만	일본	호주	태국	싱가포르	필리핀	한국	합계
인구 (백만)	1265	6.89	22.28	126.2	18.14	60.61	3.53	79.35	48.29	1630.29
스크린	7,592	176	650	2,585	1,855	410	161	1,000	818	1,5247
관객 (만명)	59,000	1,828	1,059	16,328	9,250	2,480	1,344	7,650	8,936	107,875
흥행수입 (환산/원)	9.6억위엔 (1,536억)	1.17억\$ (1,404억)	25.28억NT\$ (101억)	2001.54억엔 (2조)	8.124억A\$ (5,362억)	26.3억바트 (815억)	1.075억S\$ (740억)	28억PHP (765억)	5,236억	3조 5,959억
제작편수	91편	150편	20편	281편	26편	12편	6편	nd	65편	

※ 인도네시아 2억1612만명을 비롯, 브루나이 30만명, 미얀마 4770만명,
라오스 490만명, 말레이시아 2200만명, 베트남 7700만명 등 (지역 인구)

3) 공동제작을 통한 경쟁력 요소 확보와 시장 확대

○ 공동제작의 목적

- 자본조달의 용이성과 경제적 손실 위험의 제어 가능성
- 각 참여자의 장점과 노하우 결합 : 인력, 소재, 정보, 제작기술 등
- 시장의 공유, 새로운 시장 공동개척, 개척의 결과 공유이다.

○ 공동제작의 범주

- 공동제작(co-production) :
재원뿐만 아니라 기획, 제작 등의 전 과정을 공유함
각 나라 진흥책 혜택을 볼 수 있는 공식 공동제작(Official co-production)
- 공동출자(co-financing) :
재원을 공동으로 염출하거나 투자함
- 공동 사전구매(joint-acquisition) :
구매행위를 공동으로 하여 양측의 이익을 최대화
- 팩키지성 공동제작(twinning package) : 동일 주제로 각각 제작하여 서로 교환
- ▷ 이상의 모든 개념을 포괄하는 의미로 co-venture라는 용어가 사용되기도 함

4) 각국 정부, 진흥기구와 연계한 지역 내 진흥책 마련

- 행정서비스의 개선과 바람직한 산업환경 조성
- 적극적인 진흥책 마련
- 통관제도와 세제 개선 등
- 공동제작협정 체결

5) 문화외교 활동의 강화

- 비영리/비정부 기구(NPO), 산업계, 정부 등의 공동 참여
- 다양한 층위의 교류와 연대 활동
- WTO뉴라운드(DOHA 어젠다) 등 다자간 협상에서 '문화적 예외' 원칙 관철
- 아시아경제공동체 창설(ASEAN+ 3 한,중,일)과 연계

3. 아시아네트워크의 추진방식

1) 네트워크의 층위

- 현장 영화인 : 제작자, 감독 등
- 전문가 집단 : 개인 인적구성 중심
- 진흥기구 : 행정부, 준 행정기관 등
- 전문단체 : 영화제, 필름커미션, 아카이브 등

2) '한국의 관점'으로 바라본 현실적 전망

- 부산영상위원회 + BIFCOM
- 영상자료원 + 아카이브 아시아연맹
- NETPAC : UNESCO와 연계

월간 뉴스레터(온라인) 발간, 세미나, Yearbook 발간 등 사업 추진

- 진흥기구 네트워크

- 1단계 : 진흥기구 모델 설정

‘제도 개선’이 ‘경제적 지원’(공동 펀드 조성) 보다 우선

제도 개선의 모범 사례를 서로 보여주고, 각 국가의 정부에 대해 긍정적인 영향력을 행사

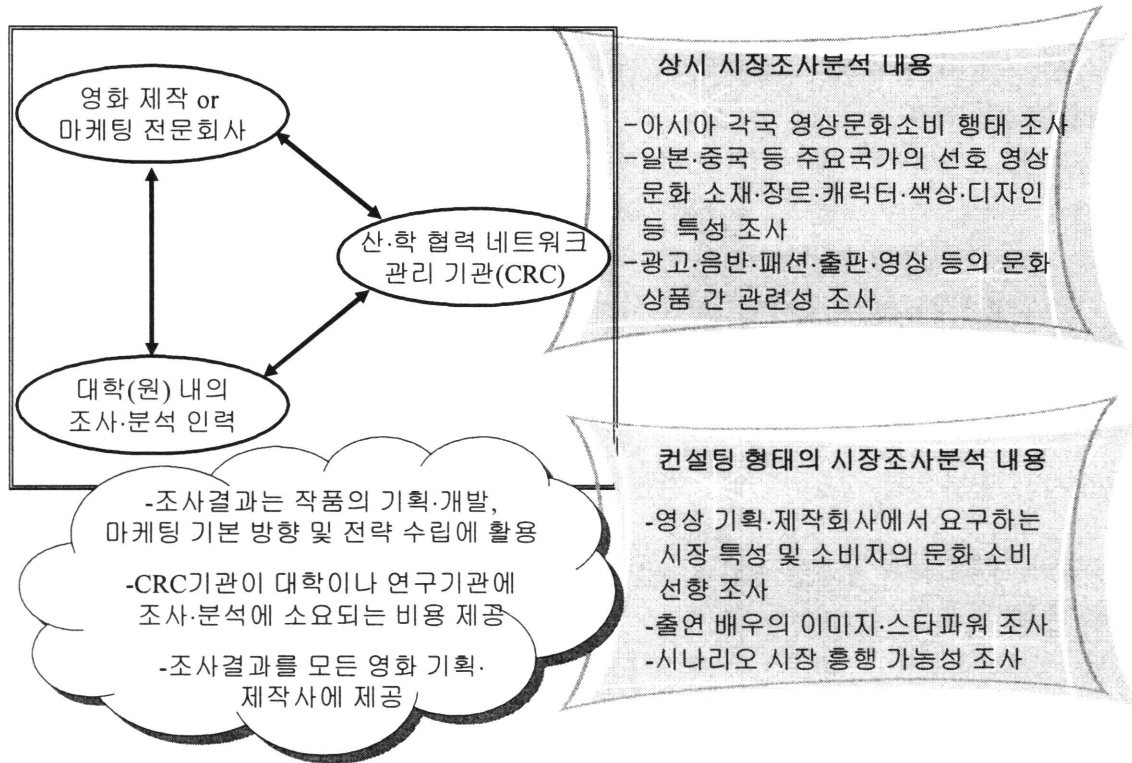
- 2단계 : 공동진흥기구 설립과 공동진흥사업

※ 국내외 참여 주체들 사이의 역할 분담

추진실적을 지속적으로 점검하면서 추진방향을 수정 보완해 나감

4. 아시아 지역의 문화소비 성향 조사·분석 연구 협력시스템 구축

<그림3> 아시아 영상문화소비 행태 관련 조사협력 Network구축



1) 영상문화 소비행태 조사 및 연구의 유용성

- 국내·외 영화·애니메이션 관객들의 작품선택의사결정 과정과 기준 등에 대한 체계적 조사·분석 결과는 시나리오 개발에 있어 시장을 이해하는 주요 정보로 활용될 수 있으며, 배급 계획이나 부가관련 시장에 대한 계획 등을 전략적으로 접근할 수 있는 기초 자료로도 의미가 있음.
- 중국이나 일본 등 주요 한국영화 수출시장에서 유행하는 코드, 배우의 캐릭터, 작품의 소재 및 내용의 구성 등과 관련된 조사 결과를 영화 제작에 참고할 경우 보다 효과적으로 성공할 수 있는 방안이 됨.
- 더불어 문화상품 간의 소비선택 결정에 미치는 요소 등에 대한 자료 축적과 분석 필요. 예를 들어 음반시장이나 패션시장 등과 영화 콘텐츠 소비 성향과 관련성을 파악해보면 이들 시장에서 나타나는 유행이 영화시장에서도 후속적으로 나타나는 경향이 있음. 2004년의 경우 음반시장에서 발라드의 유행과 패션시장에서 귀엽고 섹시한 이미지가 연초에 유행, 영화시장에서 귀여운 남·여 주인공을 중심으로 한 영화(어린 신부, 늑대의 유혹 등)의 흥행성공 등.
- 대학이나 산·학 협력을 관리하는 기관 내에서 관련 연구소를 두고 주기적으로 시장 조사 실시

- 구체적으로 기획·제작되는 영상 작품과 관련된 컨설팅 개념으로서의 관객의 문화상품 소비성향 조사

2) 한국예술종합학교 등 주요 영상전문 대학 및 대학원 의 ‘아시아 대학간 네트워크’ 구축 추진활동

- 한국예술종합학교와 중국영화학교간 자매결연 개념의 교류관계 협약체결
- 싱가포르 정부의 요청으로 한국예술종합학교 모델의 대학 또는 아카데미 설치를 위한 협력 협약(MOU) 체결
- 중국 장춘대학의 상호협력 요청
- 필리핀, 태국, 베트남 등으로 교류관계 형성 추진
 - => 한국예술종합학교 산학협력단의 아시아 8국 대상 네트워크 구축활동에 문화관광부에서 적극적인 지원을 약속함
- 아시아 각국에서 친한파 인맥 확대 및 한국문화 소비계층 확산을 위해 중국·동남아시아 지역의 영상 교육 서비스 및 국내 관련 대학과의 학생교류

5. 아시아 공동제작·공동 마케팅 지원을 위한 아시아 영상 공동투자조합 결성

- 해당 투자조합에서 투자한 영화의 자본 구성측면에서 자국 영화인정 비율을 충족시킨 것을 간주
- 단순한 production 서비스가 아닌 상호 국가의 영화 기획·제작 등의 과정에 참여하여 영상제작 방식 및 문화 교류 증진
- 제작뿐만 아니라 아시아를 포함한 세계 배급을 위해 필요한 마케팅 비용에 대한 지원도 투자로 인정.
- 아시아 영상 공동투자조합의 성격에 맞게 관련 세제 혜택 및 자금의 이동의 용이성 확보를 위한 제도적 뒷받침 필요.

Recent Conditions of Film Markets in Asian Countries and Strategies for the creation of Asian Film/Culture Industry Network

-Kim Hyung-jun (Korea Film Producers Association)-

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I. Conditions of Film Markets in Asian Countries

1. Korea

○ Conditions

-App. 120 million audiences each year(in 2003), film market worth 7.171 million Korean Won(KRW)(2003- Korean films 3.822 million KRW, foreign films 3.348 million KRW), an average production number of 67 films since the year 2000(in 2000-58 works, 2001-52 works, 2002-78 works, 2003-80 works), average number of films seen per person is 2.2 times, for Korean movies - 1.7 times(in 2002)

<Table 1> Nationwide audience share per year (%)

Year	Korean films	Foreign films	Total
2001	50.1	49.9	100
2002	48.3	51.7	100
2003	53.5	46.5	100

(source: Korea Film Council data, 2003 national statistics of Korean film industry)

- Number of theaters nationwide is 280, number of screens is 1,132 (currently in 2004)

<Table 2> Conditions of theaters in the country per year

Year	No. of theaters	No. of screens	No. of seats	Multiplex * no. of screens(%)
2001	344	818	239,068	168(20.5)
2002	309	977	240,652	432(44.2)
2003	280	1,132	256,474	595(52.6)

(source: Korea Film Council data, 2003 national statistics of Korean film industry)

○ Positive movements

- 14.6% of industry growth rates in the past 5 years, especially as Korean and Asian films are showing an equal commercial competitiveness against Hollywood films, implying a possibility of forming an Asian film industry network.
- Active foreign investments in major domestic industries - the film/culture industry, such as film, broadcasting, music, game, animation, character, has shown an economic growth rate of 21.1% from 1999 to 2002, which is 3.5 times as much as the growth rate of the Korean economy, which was 6.1% (speculations of market size in 2003 is 19 trillion KRW)
- Appearance of Korean major industries and stronger corporate competitiveness, stability in investment capitals, continuous inflow of top quality human resources

○ Negative movements

- Dissonance between quantitative growth and qualitative growth
- Despite app. 50% market share of Korean films, issues of profitability have risen with a negative ROI of -10.7% for investments made to Korean films
- With audiences on the increase for not only Korean films but also Hollywood films, the latter have higher profitability
- Petty and unstable capital accumulation in the film industry from a global perspective
- Added pressure to reduce and nullify the screen quota policy in the US, in relation with the Bilateral Investment Treaty(BIT)

○ Tasks

- Low profitability and lack of diversity

- Improvements in the distribution environment needed
- Technology to compete in a digital cinema environment and global competitiveness in the foreign marketing area must be strengthened
- Enforcement to promote local self-governing bodies and collaboration needed
- Effective responses for demands to reduce screen quotas and open up markets
- Pro-activeness in leading the exchange and cooperation of Asian industry/culture needed

2. Japan¹⁾

- Audiences per year are app. 약 162.34 million (in 2002년 160.76 million), in 2001 the number climbed up to 160 million people in 15 years, box-office profits 2032 억 59 million Yen(in 2002 196.78 billion Yen), in 2001 for the first time in Japanese film history, the number breached 200 billion Yen
- Market share of Japanese films (in 2001 39%, in 2002 27%), market share of foreign films (in 2001 61%, in 2002 72.9%)
- Weight of animation among box-office hits is still high, but motion-pictures are gaining gradual popularity(<Bayside Shakedown 1,2>, <Resurrection>, <Zatoichi> etc.)
- Total number of screens nationwide is 2,681 (in 2002 2,645) (share of multiplexes in 2003 57%), increasing competition among 3 major long-running multiplexes - Shochiku, Doho, Toei, strengthening of systemized distribution, contributing to the distribution of independent productions

3. China

- Annual number of audience is app. 700 million(2002), annual film market is worth app. 153 billion KRW(2000), number of films produced for theaters is 83(2000) and this number of domestic films is recently on the increase(in 2004, expected output is 200 works)
- Overcoming the planned economy system that existed previously, in which the government produced, distributed, and screened all movies, now the governmental direct investment has decreased and the inflow of private investments and Hollywood funds have increased.
- The officially announced market share of Chinese domestic films is over 50%, and Hollywood movies have 38%, but the actual market share of domestic movies

1) 일본영화시장의 특징은 상세한 설명을 요하므로 여기에서는 2003년의 시장 통계만 제시.

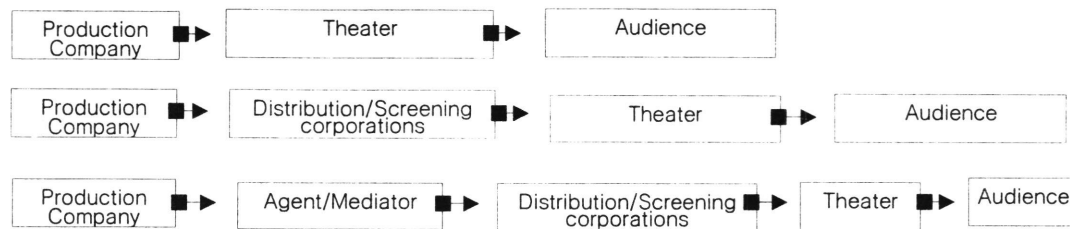
is speculated to be below 50%.

- The restriction that 2/3 of total movies showed annually per screen must be domestic films, and the import quota that limited the number of foreign films to 20 a year are being relaxed recently.
- After joining the WTO, the number of imported films will be increased to 50 films a year by 2005, and since July of 2003, Huaxia Corporation has obtained rights for foreign film distribution and with the distribution of <Terminator 2>, the monopoly system of foreign film distribution enjoyed by the China Film Group Corporation was broken.
- The administrative institution regarding films is the State Administration of Radio, Film and Television, which is one of the direct organizations under the 국무원.
- Annual number of films produced designated by the government→ films produced by 16 film studio corporations directly managed by government→ Bought by the China Film Group Corporation→ Distributed by province/city distribution corporations→ maintenance of the distribution/screening management system for a long time. With the sharp decrease of audiences in the 80's, the film studio corporations began to produce commercial films as well. This led to the birth of private film corporations and producers(however, after the Tienanmen Square massacre film studio corporations concentrated on ideological films and the film market slid downhill)
- It is in the year of 2000 that the film studio corporations attempted to seek reformation through conglomerization, forming corporations, and diversification of businesses. Moreover, successful directors such as Feng Xiaogang made his appearance and with Zhang Yimou's box-office hit <Hero>, the market is picking its pace up these days.
- Distribution is generally divided into two methods- transfer of rights and commission of distribution.

* Transfer of rights: the producing entity sells distribution rights and afterwards has no claims over the profits. That is, selling the distribution rights of a film to an agent at a specific time, to a specific area.

* Commission of distribution: The owner of the distribution rights does not sell it and gives out the distribution to commission. Afterwards, profit is shared among production, distribution, and screening entities.

<Figure 1> Distribution route of film production companies(film studio corporations and private production companies)(after 1993~)



- 11,000 screening units, theaters made especially for films are 7,592(in 2001 standards)
- in order to overcome the limitations of the monopolization network policy, an allotted screening system, a network that goes beyond regional boundaries is being constructed

* Monopolization network(院線制): a form of a monopolized business system in which the business manager creates a screening network in a specific province/city and monopolizes the screening rights of films made by a specific country or a specific production company.

- IT networks in theaters are at its finishing stages and theaters with foreign capitals are on the increase
- Fares are fairly expensive and prices differ by region. For instance, in large cities like Beijing and Shanghai, it is 30 yuan(4,800 KRW), in Guangdong 20 yuan(3,200 KRW), in Sichuan 17 yuan(2,700 KRW). However, new theaters with top facilities cost at least 100 yuan(16,000 KRW)
- In the case of foreign films with commissioned distribution, the profit allotted to foreign companies is within 13% of the total profit.
- The U.S.'s strategy against the Chinese mass is long-term and extremely thorough. Feng Xiaogang's <Big Shot's Funeral 大腕>, and Zhang Yimou's <Hero> were all funded by Columbia Pictures - Chinese branch offices of Warner Brothers and Disney Corporation have been set up, market research, investments in theaters, self-created monopolization networks, human resource management(pre-production costs subsidization)

4. Hongkong

- Annual number of films produced is 92(2002), market is worth app. 150 trillion KRW, number of audiences is 18.6 million(2002), number of screens is 184(2002),

market share of domestic films is 47%(2001)²⁾

- Enjoyed a boom that lasted for 4 years during 1989-1993 but the film industry slowed with the financial crisis. In 2000, production rates have increased as well as the capital inflow into the film industry(from mainly IT industries), and the industry is gradually recovering. As a result of active restructuring efforts of both the government and NGO's, crackdowns against pirated properties is gaining ground and hosting of the Film Mart has positioned Hongkong as a gateway to China. Active penetration of foreign markets such as North America(Hongkong's films depend over 70% on foreign markets), and efforts are made for the restoration of the film industry through international production and distribution.
- With the signing of the 'Closer Economic Partnership Arrangement(CEPA)' last July between Hongkong and China, Hongkong films that used to be regarded as foreign films in mainland will be recognized as domestic films from the year 2004. As a result, the possibility to approach the Chinese mainland has increased.

5. Taiwan

- Annual number of films produced is below 20(1/3 of them not released), number of audiences is 1.97 billion, number of screens is 669³⁾, Taipei market is worth app. 100 billion KRW.
- Over 95% of the market is dominated by Hollywood films, the rest are Hongkong films, and the market share of Taiwan films is 0.1%(2001), 2.2%(2002). The domestic film market is almost non-existent.
- Films are generally watched on CATV(tens of movie channels) rather than in theaters
- Governmental subsidy policy- with a current budget of 정부 보조금 정책-현재 연간 1.2 billion KRW, production costs for 10-15 films are supported but there is the issue of effectiveness and the government is seeking film polity reformations.
- Shortage of expertise due to the long-term stagnation of the film industry
- Top-down hierarchy of the distribution/screening by major film studios(in charge of all the distribution, trade, distribution, and owns CATV)
- Wide release and individual releases : wide releases, in which films are released simultaneously in over 20 theaters through major production/distribution companies, are the mainstream(introducing films through individual releases by some directors are increasing)

2) 관객, 스크린수, 자국영화점유율 www.screendigest.com

3) 관객, 스크린수 www.screendigest.com

- Absolute superiority of Hollywood films: import quota greatly relaxed twice in 1997. On June 1st, the number of imported film reels were increased from 31 to 38, and on November 20th, was again increased to 50 reels. The number of theaters that may be set up in the same city was expanded from 11 to 18, and measures have been taken to permit 3 screens to simultaneously play the same movie in a single theater. Afterwards, Hollywood films took over the theaters.

6. East Asia

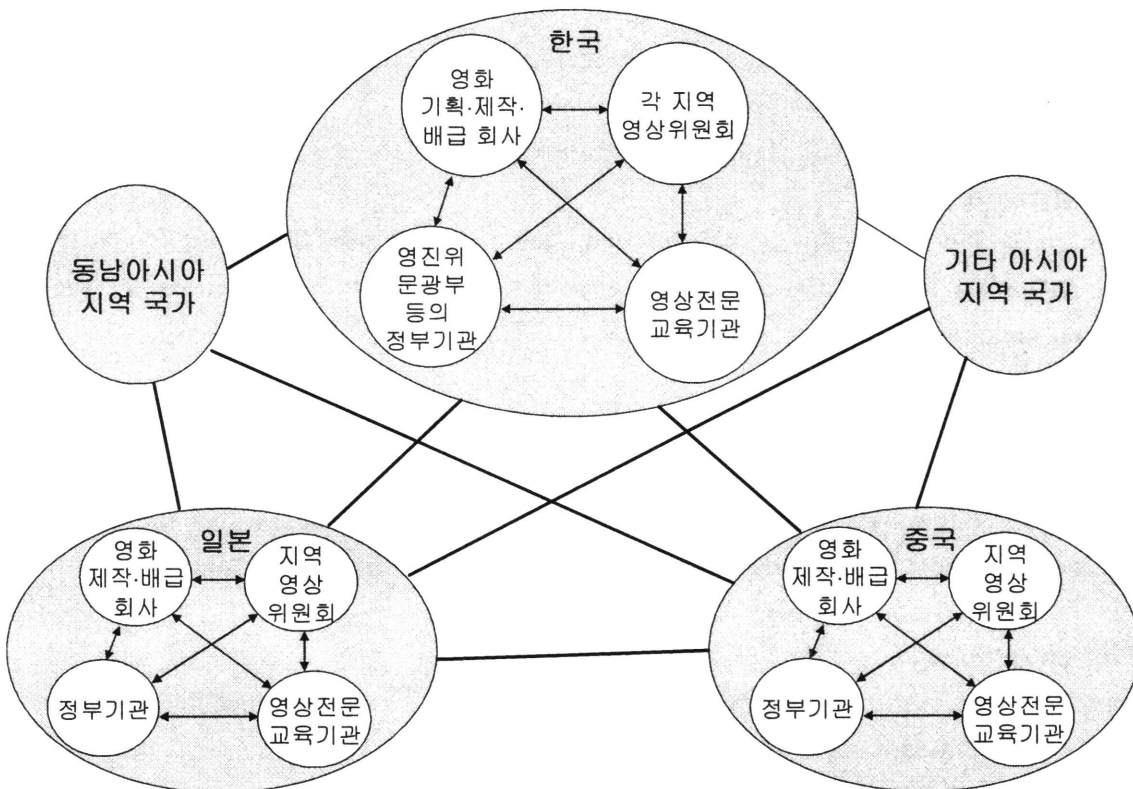
<Table 3> Conditions of film industries of East Asian countries

Country name	Market value(KRW)	Annual no. of audiences	No. of screens	Market Characteristic
Thailand	97.2 bill	28.8 mill (2002)	465(2002)	-25 films produced in 2002 -distribution through agents in regions other than Bangkok -market share of Hollywood films is 80% -the base center for reel distribution with strong post-production skills
Malaysia	24 bill	10.2 mill (2002)	310(2000)	-9 films produced in 2002 -market share of Hollywood films is 60%
Indonesia	50.4 bill	146 mill (2002)	850(2002)	-2-3 films produced annually -2/3 of market share is dominated by Hollywood and Chinese films -dominance of TV and DVD -synchronous release is impossible in an island country. Films are first released in Java Island, where the capital Jakarta is located. -active remodeling of multiplex centers
Singapore	69.6 bill	14.3 mill (2001)	139(2002)	-5-8 films produced annually -distribution network dominated by American direct distribution companies. No domestic distribution corporations. -40% of imported films are American or Hindi

(Source: Korea-U.S. Investment Treaty and the Screen Quota(Korea Film Council, 2003), Basic Research for the Creation of an Asian Film Network(Korea Film Council, 2002), 2002), focus2003(Marché du Film, 2003), Cinemagoing Asia Pacific(Dodona Research, 2001), www.screendigest.com)

II. Strategy for the Creation of an Asian Film/Culture Network

<Figure 2> Model of Asian Film/Culture Industry Network



1. Necessity of the activation of film/culture exchange among asian nations as a prerequisite for an Asian network

1) Preparatory conditions

- Asian culture forums are being held at the government level

- AFCN and AFIN have been formed

2) Tasks

- Other than support for the industry or location, active interaction among student/research human resources affiliated with education institutions of professional film production, and the creation of a network to institutionalize this movement are necessary.
- A co-production and investment main frame enabling the culture affinity in the Asian region should be established.

① Korea/China/Japan co-production and the creation of a common investment funds

② Interaction among film/culture education institutions among Korea/China/Japan

③ Establishment of support systems to activate filming on location in each other's countries(in the case of supporting filming on location in the Asian region, national treatment should be applied, and an information infrastructure should be created with regard to locations within the region that allow and encourage filming.)

- Encourage film production and increased mutual interaction by having countries with an active film/culture production environment support the countries in want of such conditions.

2. Joint projects that may be promoted through the Asian network

○ Object : culture exchange and development of film industries within the region

○ Promotion method : gradual development from lower to upper stages

1) Provide information

- provision of diverse and extensive information through research and investigation
 - Utilize media such as publications and internet
 - Seminars, education
- detailed introduction of the conditions of each country's industry and film related services
- Enforce expertise of human resources and work at the qualitative improvement of support services such as film commissioning
- Encourage the establishment of promotion institutions in each country

2) Expansion of employment and creation of added value through supplying support for location/production/technology related services among Asian countries

- Examination and improvement of committed elements of each country
- Strengthening the competitive power of Asian films through the synergy effect of committed elements of each country with its own competitive advantage

<Table 4> Inspection criteria and evaluation sheet for each country's competitive elements

item		China	Hongkong	Taiwan	Japan	Australia	Thailand	Korea
Spacial environment (location)	Natural scenery	○	×	△	○	○	○	△
	City	△	◎	×	○	○	△	△
Production human resources		가) △*	○	×	△*	○	○	△
Technology services		×	△	×	○	○	○	△
Competitive power of industry		×	△	×	○	○	△	△
Administrative services (Corruption index)		△	○	×	○	○	×	△
national treatment of supportive measures (National Treatment)		×	×	×	×	○	×	△

* Chinese and Japanese production personnel are very skilled in the art and prop area

<Table 5> Major conditions of Asian countries

Category	China	Hongkong	Taiwan	Japan	Australia	Thailand	Singapore	Philippines	Korea	Total
Population (million)	1265	6.89	22.28	126.2	18.14	60.61	3.53	79.35	48.29	1630.29
Screen	7,592	176	650	2,585	1,855	410	161	1,000	818	1,5247
Audience (ten thousand)	59,000	1,828	1,059	16,328	9,250	2,480	1,344	7,650	8,936	107,875
Box-office profit (KRW)	960 mill yuan (153.6 bill)	117 mill \$ (140.4 bill)	2.53 bill NT\$ (10.1 bill)	200.154 bill Yen (2 trillion)	812.4 mill A\$ (536.2 bill)	263 bill Baht (81.5 bill)	107.5 mill S\$ (74 bill)	2.8 bill PHP (76.5 bill)	523.6 bill	3 trill (595.9 bill)
No. of films	91	150	20	281	26	12	6	nd	65	

※ 인도네시아 2억1612만명을 비롯, 브루나이 30만명, 미얀마 4770만명, 라오스 490만명, 말레이시아 2200만명, 베트남 7700만명 등 (지역 인구)

3) Secure competitive elements through co-production and market expansion

○ Object of co-production

- Facilitates funding arrangements and heightens controllability of the risk of financial loss
- Combine each participating country's strengths and know-how : human resource, ideas, information, production techniques etc.
- Market sharing, joint approach to a new market, sharing the results of the approach.

○ Range of co-production

- Co-production :
Sharing not only the financial aspects, but the entire process, such as planning and producing.
An official co-production that allows the benefit of each country's promotional policies.
- Co-financing :
joint fund raising or investment of finances
- Joint-acquisition :
maximization of profit for both parties by joint-acquisition
- Twinning package : interchange final work after individual production under the same theme
 - the word 'co-venture' may be used to embrace all of the concepts stated above

4) Preparation of regional promotional policies, in collaboration with each country's government and promotional organizations

- Improve administrative services and create a desirable industrial environment
- Arrange active promotional policies
- Improve customs regulations and taxation
- Close co-production agreements

5) Enforce cultural diplomacy activities

- Co-participation among NGO/NPO, industries, government, etc
- Interaction and collaboration across diverse levels
- Carry out the policy of 'cultural exception' in multi-governmental agreements such as WTO New Round(DOHA Agenda)

- Creation of an Asian economic bloc(ASEAN+3 Korea, China, Japan) and inter-collaboration

3. Creation of an Asian Network

1) Layres of the network

- Film-makers on the field : producers, directors
- Expert group : centered on personal networks
- Promotional organizations : administration, semi-administrative institutions
- Expert organizations : film festivals, film commissions, archives

2) Realistic perspectives from a 'Korean standpoint'

- Busan Film Committee + BIFCOM
- Korea Film Archive + Archive Asian Federation
- NETPAC : collaboration with UNESCO

pursue businesses such as publishing a monthly newsletter(online), seminar, or yearbook

- Promotional organization network
 - 1st stage : Set up a model of promotional organization

'system improvement' is more urgent than 'financial support'(creation of a joint fund)

present exemplar cases of system improvement to each other and impose a beneficial influence over the government of each country

- 2nd stage : establishment of a co-promotive organization and co-promotive business

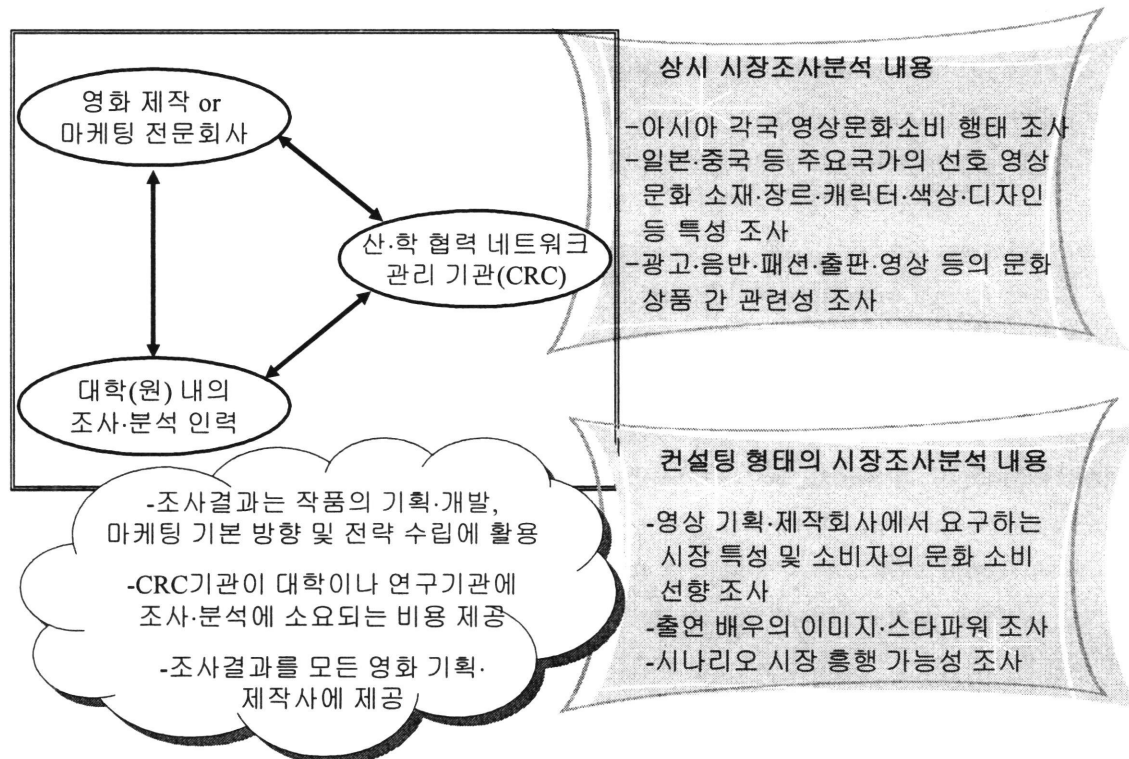
※ division of roles among international participating entities.

with continuous inspection of performance, the direction of pursuit will be amended and supplemented.

4. Establishing a cooperative system for the investigation/analysis research of culture consumption trends in the Asian region

<Figure3>

아시아 영상문화소비 행태 관련 조사협력 Network구축



1) The significance of investigation and research on the consumption behavior of film/culture

- The results of systematic investigation/analysis of the decision processes and criteria of audiences in choosing domestic/foreign movie/animation may be utilized as an essential key to understanding the market before scenario development, and may also serve as basic data to strategically approach distribution plans or value-added copyright markets.
- Incorporating research results related to popular codes in major export markets of Korean films such as China or Japan, the actors' characters, structure of ideas or contents of the films, may be a factor that leads to success.
- Moreover, data aggregation and analysis on the elements that influence consumption decisions among cultural products are necessary. For instance, grasping the relationship between record markets or fashion markets and film contents consumption trends, it can be seen that these market trends will surface

in the film market later. In the case of the year 2004, ballads were popular in the record market and a cute/sexy image was popular in the fashion market at the beginning of the year. This led to the success of movies that star cute male/female characters(My Little Bride, Temptation of Wolves)

- Set up research centers in universities or in facilities that are responsible for the industry/academia collaboration, and execute regular market investigations
- Investigate the audiences' consumption behaviors of culture products from a consulting aspect with regard to film products that are specifically planned/produced

2) Pursuit the creation of 'Asian College Network' at major professional film schools and graduate schools such as The Korean National University of Arts(KNUA)

- Close exchange agreements under the concept of 'sister schools' between KNUA and China Film School
- Close a MOU treaty under the request of the Singapore government to establish a college or academy with KNUA as the model
- Request for mutual cooperation from China's Chang Chun University
- Pursue creation of exchange networks with Philippines, Thailand, and Vietnam

=> Guarantee of active support from the Ministry of Culture and Tourism on the network creation of 8 Asian countries led by KNUA's industry/academia cooperation organization

- Cinematic education service in China/East Asian regions and student exchange between related Korean universities for the expansion of pro-Korean personal networks within Asian countries and the spread of consumption class of Korean culture

5. Establishing an Asian Film Joint Investment Union to support Asian co-production/co-marketing

- In the aspect of financial structure of films invested by the applicable investment union, it is regarded as satisfying the national film recognition ratio
- Not just simple production service, but by participating in film planning/production process of other Asian nations, film production methods and culture exchange may become advanced
- Recognize as investment the supporting of marketing expenses necessary not only for the production but also for the global distribution including Asia
- Institutional support ensuring tax benefits and active cash flow that is appropriate for the Asian Film Joint Investment Union.

2004年11月25日

「映画の著作権保護期間の延長」について

社団法人 日本映画製作者連盟
専務理事 事務局長 福田慶治

1. はじめに

我が国は、1970年（昭和45年）の現行法制定以来、著作権に関する基本的条約であるベルヌ条約の規定に則り、著作権の原則的保護期間を著作者の死後50年までとしている。保護期間の延長の問題については、保護期間の相互主義により、我が国より保護期間の長い国において日本の著作物が利用された場合、当該著作物は我が国の保護期間だけしか保護を受けることができず、当該国において我が国の権利者が著作物使用料を得る機会を失うのは均衡を欠くことや、保護期間を延長すれば著作者本人の創作意欲の増進につながる等の理由から映画の著作物の保護期間を「公表後50年まで」から「著作者の死後50年まで」に改めるべきとする意見や欧米諸国の動向を踏まえ国際的調和の観点からも検討すべきという意見があった。

（社）日本映画製作者連盟も従来から、資産価値を現に有し、商業的利用が行われている作品の著作権を消滅させるべきではない、消滅させるとかえって円滑な利用が行われなくなるという2つの理由を主張してきた。

今回、2002年度改正要望では、他の著作物の保護期間との違いを強調した要望を行ったので、そのとき主張した論点について申し述べる。

○日本映画の黄金期の作品の著作権が消滅しようとしていた。

*小津安二郎監督作品

- ・1952年（昭和27年）までの公開作品（「宗方姉妹」「お茶漬の味」等）は、2002年12月31日で著作権消滅
- ・1953年（昭和28年）公開作品（「東京物語」）は、2003年12月31日で著作権消滅

*溝口健二監督作品

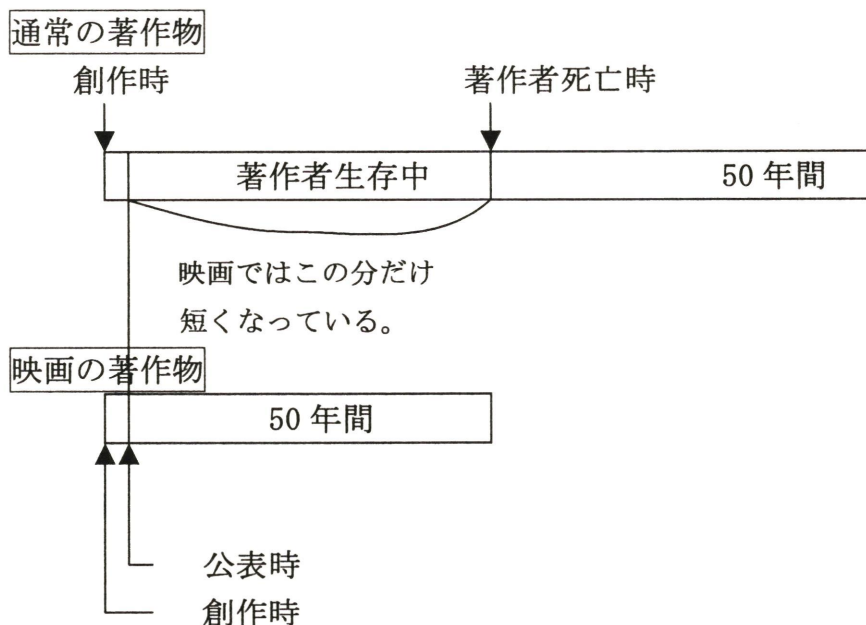
- ・ 1951年（昭和26年）までの公開作品（「武蔵野夫人」）は、既に著作権消滅
- ・ 1952年（昭和27年）公開作品（「西鶴一代女」）は、2002年12月31日で著作権消滅

以上のように、世界的にも極めて高い評価を得ている1950年代の映画の著作権が続々と消滅しつつある状況下にあった。

2、映画著作物の保護期間を「公表後50年」と定めているが法改正を要望する理由

1）他の著作物の保護期間との実質格差の是正

小説、音楽等、映画以外の著作物は、創作時から著作者の死亡時までの期間に加算して死後50年間の保護を与えられている。これに対し、映画の著作物は公表後50年間の保護しか与えられておらず、実質的な保護期間において不均衡が生じている。



- ・ 例えば、川端康成（1972年没）の小説「伊豆の踊子」（1926年公表）は1926年から2022年まで合計96年間の保護を受けている。しかし、小説公表から半世紀も後に製作された映画「伊豆の

踊子」(1974年 山口百恵主演)は2024年までの50年間の保護しか受けられない。

- ・映画の場合は、創作時と公表年とが近接しており、「お蔵入り」がほとんどない。仮に「お蔵入り」があっても、映画の著作物は、公表されない限り、経済的利用が出来ない。「経済的利用権」が保証されているのは50年間だけである。

2) 主要先進国との比較

*アメリカ合衆国(アメリカ著作権法302条)

- ・通常の著作物は著作者の死後70年
- ・映画の著作物を含む「職務著作物」は発行後95年、公表時起算の場合と死後起算の場合とで、25年の差を設けている。

*EU指令(ドイツ、フランス、イギリスの国内法も同様)

- ・通常の著作物は著作者の死後70年(1条)
映画の著作物については、「主たる監督、脚本家、台詞構成者、映画のために特に創作された音楽の作曲者」のうち最後まで生存した者の死後70年後

*カナダ

- ・通常の著作物は著作者の死後50年
- ・映画の著作物については、発行後50年

3, なぜ公表後「70年」なのか。

今回の改正提案は、死後50年との実質的不均衡を是正することを目的とするものである。たまたまEUの原則的保護期間が「死後70年」であり、70年という数字が一致しているが、決してEUに合わせるべきという趣旨の提案ではない。

死後50年の場合には、「創作時から著作者の死亡時」までプラス「死後50年」の保護を受けており、「公表時から50年」と比べると、「公表時から著作者の死亡時」までの期間だけ長くなっている。そこで、そ

の平均的な期間がどのくらいか、ということが問題となる。

この期間を実証するため、日本映画製作者連盟会員社が製作し、1950年（昭和25年）から1960年（昭和35年）までに公表された映画の著作物の主要な作品のうち、原作となった文芸作品が特定できるものについて、当該文芸作品が平均してどれくらいの期間の保護を受けているのかを調査した。

その結果、原作の「公表時から著作者の死亡時」までの平均年数、つまり、映画の保護期間より長く保護されている期間は、平均して「28, 5年」であった。この調査結果に基づくと、死後50年との実質的不均衡を是正するためには、公表時から「78, 5年」の保護が映画に認められるべきということとなるが、今回の提案は、公表後70年とすべきという改正要望を提出したわけである。

4, 「ウェルフェア」について

映画の保護期間を延長することは、古い映画の利用を活性化させ、国民全体の利益につながると考えている。

それはともかく、今回の提案は、他の著作物との実質的不均衡を是正するために必要な限度での延長を求めることにすぎない。

議論されるべきは、なぜ映画の著作物だけが他の著作物よりも不当な扱いを受けなければ成らないのか、という問題である。

映画の保護期間を公表後70年にすることがどれだけ国民全体のウェルフェアにかなうのか、という問題の立て方でなく、映画の著作物だけは他の著作物よりも保護期間を短くすることが国民全体のウェルフェアの観点から必要なのか、という問題の立て方がされるべきである。

映画の著作物は、ゲームソフトのうちの視聴覚的表現部分も含め、技術的・実用的性格の強い著作物ではない。

また、映画の著作権は、具体的な表現を保護するものであって、思想感情やアイデアそのものを保護するものでないから、特許権とは異なり、「思想やアイデアは万民のもの」という発想から特に保護期間を短期にすべきという要請はない。

それどころか映画の著作物は、他の著作物とは異なり、固定要件を必要とするところ、あくまでフィルムなりテープに固定された具体的な視聴覚的表現が保護の対象であって、その保護は、「先人の作品からインスピレーションなりヒントを得て新たな作品を創作する」ことを制約する

ものではない。

文化や芸術の発展のために、特に映画の著作物に限り、保護期間を短くすることがウェルフェアの観点から必要であるという事情は全くない。

5, 著作権法の施行令の一部を改正する政令について

2003年（平成15年）第156回通常国会

1, 映画著作物の著作権の保護期間の延長

(第54条関係)映画の著作物の保護期間を公表後50年から公表後70年に延長すること

2, 1953年（昭和28年）公表の映画は、（改正がなければ2003年12月31日で著作権が満了する作品、小津監督「東京物語」溝口監督の「雨月物語」等）は延長された。

今回の改正法施行日は2004年1月1日

3, 「公表後70年」よりも「監督の死後38年」の方が長いときは、より長い保護を受ける。1970年以前の旧著作権法時代に公表された作品で、監督の死後38年のほうが公表後50年よりも長ければ監督の死後38年の保護を受けていた。

公表後70年になっても、監督の死後38年のほうが長いことがある。（公表後、監督が33年以上生存した場合）

今般の改正法の付則3条で、旧著作権法の保護を短くしないことが明確にされた。

* 黒沢明監督（1998年没）の「姿三四郎」（1943年）は、
2013年12月31日でなく、
2036年12月31日まで保護される。

以上

November 25, 2004

On “Extension of Copyright Protection Period of Movie Films”

Japan Film Producers Association
Executive Director and Secretary General
Fukuda Keiji

Overview

1.Introduction

2.Copyright protection period for films is set at “50 years after release”. The reasons for revision to extend the period to “70 years after release” are as follows:

- 1) Rectifying the actual gap between movie film copyrights and the protection period of most other types of copyrighted works
- 2) The imminent expiration date of copyrights of movies produced in the golden age of Japan’s film industry.
- 3) Increased imbalance compared with the time of enactment of the current law due to increased average longevity
- 4) Continuous commercial use
- 5) Comparison with major advanced countries

3.Why “70 years” after release?

4. On the so-called “welfare”

5. Legislation bill on revising some of the copyright law (produced at the 156th regular parliamentary session in 2003)

Extension of copyright protection period - from 50 years after release to 70 years after release –

Enforcement date of the revised law: January 1, 2004

2004 년 11 월 24 일

‘영화의 저작권 보호기간 연장’에 대해

사단법인 일본영화제작자연맹
전무이사·사무국장 福田慶治

개요

1, 머리말

2, 영화저작물의 보호기간은 ‘공표 후 50 년’으로 정해져 있는데,

‘공표 후 70 년’으로 개정을 요망하는 이유

- 1) 다른 저작물의 보호기간과 실질적 격차의 시정
- 2) 일본영화 황금기 작품의 저작권 소멸 시점 임박
- 3) 평균수명 연장에 따라 현행법 제정 시에 비해 불균형 확대
- 4) 상업적 이용의 계속
- 5) 주요 선진국과의 비교

3, 왜 공표 후 ‘70 년’인가?

4, 이른바 ‘웰페어(welfare)’에 대해

5, 저작권법의 일부를 개정하는 법률안(2003 년 제 156 차

정기국회에서 성립)

영화의 저작권보호기간 연장—공표 후 50 년에서 공표 후 70 년으로—
개정법 시행일, 2004 년 1 월 1 일

TV & 放送 2

TV & Broadcasting 2

引进与控制：中国电视频道中的海外节目

一、中国电视频道的基本情况

中国拥有巨大的电视节目消费市场。至 2002 年底，中国共有电视台 368 座，频道 2124 个⁽¹⁾——其中国家级的中央电视台（CCTV）开设了 15 个频道，占据收视市场 60% 以上的份额。目前，中国所有大城市的居民都可以接收到 50 个左右的电视频道。

至 2003 年底，中国电视观众有 11 亿 6 千 7 百万人，电视人口覆盖率 94.61%；2003 年，中国电视观众人均收视时间为 179 分钟，与 2002 年持平。⁽²⁾

2003 年，全国电视频道年制作电视节目时长为 1791110 小时，其中系统内电视机构自制电视节目 1185507 小时，外包加工制作电视节目 605603 小时；购买电视节目 1183651 小时。⁽³⁾

在各类节目播出总量中，电视剧的播出份额最大，占到总量的四分之一；其次是新闻和专题类节目。换言之，电视剧、新闻和专题是收视份额最高的三类节目。⁽⁴⁾ 2003 年中国国内共制作电视剧 619 部，10654 集；引进境外电视剧 1997 部，45416 集。⁽⁵⁾

二、海外节目在中国的现状

1、 海外节目的进入渠道

目前，海外节目进入中国电视市场有两种主要渠道：即频道落地与节目出售。

（一）海外电视频道落地情况

多年以来，中国严格控制接收境外卫星电视节目。对境外电视媒体主要的限制首先是有限范围的落地，即广电总局只允许三星级或三星级以上酒店、涉外公寓和确有工作需要的单位，才可申请接收广电总局批准落地的加密电视频道，换言之，境外电视节目不存在普通的观众。一些海外电视媒体也正是通过这一渠道首先将国外的电视节目引进到中国来。截止到 2003 年底，经批准国内三星级或国家标准二级以上涉外宾馆等，可申请接收的境外加扰卫星电视频道共 30 个。其中除去港澳台地区之外的海外频道共有 18 个。（附表 1：允许三星级以上涉外宾馆接受的境外频道（除港澳台）名单）

另一方面，以 2001 年 9 月开始，中国国家广播电影电视总局出台举措，开放中国华南一带作为传媒特区，美国在线时代华纳斥资收购香港华娱电视后打造的中文频道华娱卫视，

被批准进入广东有线电视网络，作区域性落地。紧接着，2001年10月，广电总局正式批准新闻集团在香港开办的凤凰卫视中文台在珠江三角洲全面落地。到了2002年3月28日，美国新闻集团在亚洲的全资子公司“星空卫视”，通过广东有线电视网在珠江三角洲地区正式开播，这是中国首次将有线电视网落地权授予一个境外频道。

（二）海外电视媒体向国内出售电视节目情况

能够在国内落地的海外电视频道毕竟有限，而且能够在有线网落地的境外电视频道，在中国大陆没有独立的广告经营权，也就限制了境外频道的利润来源。在此政策环境下，不如美国在线时代华纳、新闻集团幸运的其他境外电视媒体，暂时也只能以单个节目的形式进入中国市场。

在政策限制下，海外电视媒体通过合作生产而非原形态的方式向中国出售电视节目。一般有两种做法：

第一种是国外媒介集团同中国国内电视台以投资合作或赞助的方式提供节目素材，再由合作的电视台制作包装后在国内播出和出售。这种做法的例子是：2001年2月1日，中央电视台与美国映佳国际集团签订了新的五年合作协议，中央电视台以《佳艺》系列栏目的形式播放映佳提供的众多国际优秀电影和各类电影节目。2002年美国在线时代华纳集团所属的卡通频道同中央电视台签署协议，授权央视播出他们的动画片。2003年12月19日，默多克领军的新闻集团与湖南广播影视集团达成全面合作协议，包括双方共同生产电视节目、互换节目等内容。但上述做法实际迫使国外著名的电视频道在进入中国后放弃原有品牌，给国内电视台提供节目素材，再以国内电视频道的品牌出现在观众面前。

与上述先合作再出售不同的是，MTV等频道采取的是直接出售带品牌的电视节目的方式进入中国电视节目市场：自1995年MTV在中国设立办事处以来，以MTV为主制作的《MTV天籁村》、《MTV学英语》、《MTV光荣榜》和《MTV明星档案》四档节目，陆续通过节目交换的方式覆盖了超过38个省市的有线电视网络，有6300万户家庭能够观看到。

ESPN通过把NBA、欧洲足球联赛等世界著名赛事引进中国、为中国的各级电视台提供体育节目实现了自己品牌的推广。此外，还有DISCOVER国家地理频道，通过与内地的媒体和节目运营商合作，利用国内媒体或者运营商的播出平台实现了其电视节目在中国内地的播出，

第二种是投资国内的一些节目发行公司、节目制作公司，通过这些节目公司将自己的电视节目引进到中国内地来。就目前来看，中国电视节目制作与发行主体包括三部分。首先，是中央电视台下属和直属的节目制作发行公司，包括中国国际电视总公司以及上市公司中视

传媒；其次，是各省级广电集团下属的节目制作和运营公司；最后，就是如雨后春笋般迅速崛起的民间制作力量，比较著名的有北京银汉、光线和唐龙传媒等民间传媒机构。这种模式的例子有：2001年3月，Viacom选择了唐龙传媒作为推广其旗下在美国儿童节目市场占有率50%份额的Nickelodeon儿童频道节目落地的中国合作伙伴。维亚康姆将本土化后的“尼克知识乐园”嫁接在唐龙的发行网络上，与唐龙一道制定了《尼克知识乐园》在中国的用户规划。

2、海外电视剧

作为电视节目的重要组成部分，电视剧无论是在播出时间、收视率表现，还是在广告收入上，对中国电视产业都具有举足轻重的作用。根据《2003 中国电视收视年鉴》提供的资料，电视剧是中国电视观众选择中仅仅居于新闻类节目之后的节目类型，实际收视率也仅次于新闻类节目。所以，海外电视剧自然而然地构成了海外节目在中国电视屏幕上的主力军。根据2003年央视-索福瑞媒介研究（CSM）提供的全国33个城市156个频道的电视剧收视报告，在晚间17:00-24:00总共播出1601部电视剧，平均收视率为3.19%，其中国外剧175部，占总量的10.93%。

（一）、2002年各级电视台海外电视剧购买情况

《2003 中国电视剧市场报告》显示，2002年，81.8%的被调查电视台购买了海外引进电视剧；在购买海外电视剧的电视台中，平均购买海外电视剧10.7部、219.9集，占同期购买电视剧总部数的14.1%，占购买电视剧总集数的13.2%。

（二）主要电视频道晚间时段海外电视剧播出概况

根据央视-索福瑞媒介研究（CSM）对全国147个主要电视频道的电视剧播出情况的监测，2002年晚间19:30-24:00的时段中，132个电视频道播出了海外引进电视剧，占被调查电视频道整体的89.8%。132个电视频道晚间时段共播出海外引进电视剧327部，占全部剧集播出部数的22%；共播出海外引进电视剧1411部次（包括同一电视剧在多个电视频道播出的情况），占全部电视剧集播出部次的21%。（附表2：图：海外引进电视剧与国产电视剧播出部数、部次分布）

目前，海外引进电视剧主要在各省、市电视台有线电视频道（主要是影视频道等）播出，而省级上星频道和省、市电视台无线频道播出比例相对较小。

（三）、主要电视频道播出海外电视剧来源分布

在2002年国内主要电视频道播出的全部327部海外引进电视剧中，香港电视剧133部，占播出海外电视剧总部数的40.7%；韩国电视剧67部，占播出海外电视剧总部数的20.5%。

其他海外引进电视剧包括台湾 42 部、美国 39 部、日本 23、欧洲（英国、法国、德国、意大利等）10 部、新加坡 7 部、其他国家和地区（澳大利亚、加拿大、哥伦比亚、墨西哥等）6 部。（附表 3：2002 主要电视频道播出海外电视剧来源分布）

国内主要电视频道播出的香港、台湾与新加坡等华语电视剧共有 182 部，占全部海外电视剧播出部数的 55.7%，成为国内引进海外电视剧的第一大板块。韩国与日本电视剧以占全部部数的 27.5% 成为第二大板块。华语与韩日两大亚太板块合计占总体的 83%，欧美等国家的剧集只占有 17%。

（四）、韩剧在中国的表现

上个世纪 90 年代中期，日剧曾掀起一阵收视高潮，一部《东京爱情故事》至今仍让观众多观众难忘。如今，“韩流”席卷而来。在 2002 年，国内主要电视频道播出的日剧主要有《白昼之月》、《美丽人生》、《让我们结婚吧》等 23 部，不管是播出部数还是播出部次都远低于韩剧，日剧风头完全被韩剧掩盖。（附表 4：图：2002 主要电视频道韩国与日本电视剧播出部数、部次比较）

1997 年，中央电视台二套以每周 1 集的速度播出韩国电视剧《爱情是什么》，韩剧在中国市场上的火爆就是从这部剧集开始的。这部讲述保守家庭和开放家庭之间联姻故事的电视剧在央视播出后引起极大反响，其生活化的情节得到了广大中国观众的喜爱。正是这部开山河之作使韩剧有了良好的口碑，此后韩剧大举进攻内地，充斥荧屏。

2001 年，国家广电总局徐光春局长会见访华的韩国文化观光部长官金汉吉时说：“中国不会限制进口韩国电视剧，打算从今年 8 月开始在中央电视台进口和播放更多的韩国电视剧”。近年来，韩国电视剧强势杀入中国内地，在 2002 年主要电视频道的播出部数与播出部次方面都紧随港剧之后，稳居第二的位置。国内电视观众、特别是年轻的电视观众几乎全年都在因为《蓝色生死恋》、《冬日恋歌》哭泣。

目前，在国内播出的韩剧主要都是偶像剧，这些青春偶像剧现在已是年轻观众所钟爱的收看对象，裴永俊、安在旭、金喜善、宋承宪、宋慧乔、张东健等一批韩剧明星在没有宣传的情况下迅速成了大批中国年轻观众的最爱。（附表 5：2002 主要电视频道播出次数最高的韩国电视剧排名 TOP10）

三、对进口海外节目的管制

中国政府对于海外电视节目的引进采取了有控制地开放态度。海外电视节目一般通过电视剧、电视专题片、电视综艺节目、体育节目和电视广告等形式进入中国。中国政府的控制包括对引进总量、引进主体、引进国家、节目题材内容、播出时段和比例限制等多个层次。在这些强有力的行政措施的管控下，中国的电视改变了改革开放早期盲目引进播放美国和日本电视剧时的被动状况。

随着中国电视市场的逐步开放和海外节目形态的增多，中国对海外节目的管制特征趋向于：1 在管制对象上，从最初的笼统化走向明细化；2 在审查制度上，从严格走向宽松；3 在管制重点上，一贯坚持控制海外电视剧的播出总量和播出时间。

2003 年，针对中国国内部分省市擅自接受并在有线网络内播放境外卫星频道的行为，广电总局先后出台了《关于严禁通过广电有线网传送境外卫星电视节目的通知》和《境外卫星电视频道落地管理办法》，加强对境外卫星电视的管理。

在 2004 年最新颁布的《境外电视节目引进、播出管理规定》中，广电总局实行了对引进境外影视剧和以卫星传送方式引进其他境外电视节目分别管理的举措，并再次重申各电视频道每天播出的境外影视剧不得超过该频道当天影视剧总播出时间的百分之二十五的规定；同时还规定不得在黄金时段（19：00—22：00）播出境外影视剧。另外规定，经批准引进的其他境外电视节目，应当重新包装、编辑，不得直接作为栏目在固定时段播出；而且节目中不得出现境外频道台标或相关文字的画面，不得出现宣传境外媒体频道的广告等类似内容。

四、结语

1、自改革开放以来，海外节目始终在中国的电视频道上占有一席之地，且其收视份额呈逐年递增之势；

2、引进海外节目的形态是根据中国市场的需要不断调整变化的。今后，海外电视剧的进口量会有所下降，而纪录片等专题类节目的比例会增大，同时一些大成本制作的益智类节目和真人秀节目将会受到中国观众的欢迎；

3、中国对海外节目的政策将逐步趋于宽松，同时未来管理的重点会转移到知识产权保护 and 打击盗版上来——这对海外节目提供商来说，无疑是个利好的消息；

4、随着中国国内付费频道、数字频道的开播以及网络电视等新载体的出现，对节目的需求将会极大地增加，但中国国内目前的节目制作力量还远不能满足此种需求。因此，

可以肯定，未来中国电视市场对海外节目的需求将会比以往任何时候都更加强烈。

本文所引资料出处：

- (1) 《中国广播电视年鉴 2003》
- (2) 《中国广播电视年鉴 2004》
- (3) 《2003-2004 中国电视市场报告》
- (4) 资料来源：央视-索福瑞媒介研究 CSM
- (5) 《2003-2004 中国电视市场报告》

附表部分

附表 1:

允许三星级以上涉外宾馆接受的境外频道（除港澳台）名单

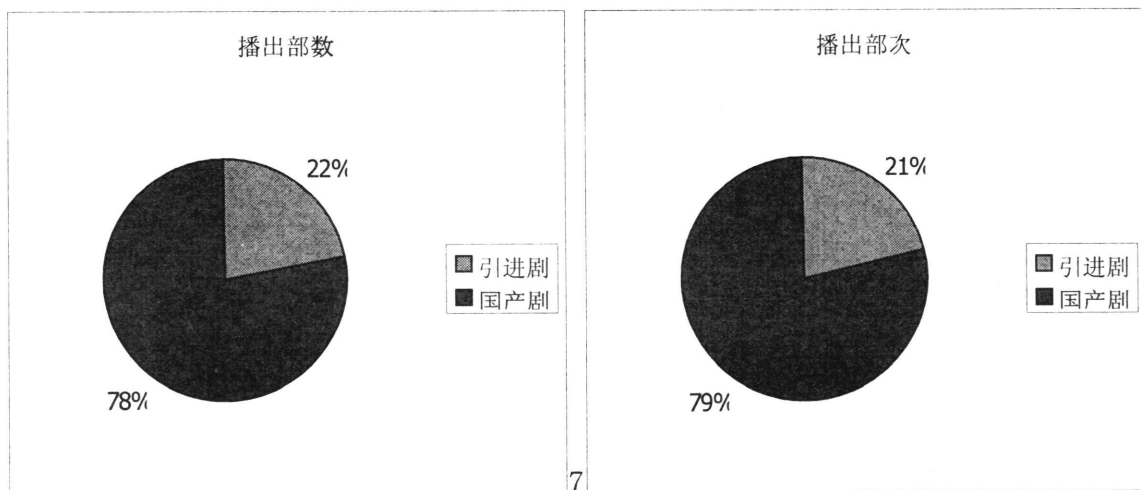
序号	加扰卫星电视频道名称	控制公司	国家或地区
1	美国有线电视新闻网 (CNN)	美国在线时代华纳集团	美国
2	家庭影院亚洲频道 (HBO)	美国在线时代华纳集团	美国
3	CINEMAX 亚洲频道 (CINEMAX)	美国在线时代华纳集团	美国
4	全国广播公司亚洲财经频道 (CNBC)	美国全国广播公司	美国
5	娱乐体育节目网亚洲频道 (ESPN)	美国广播公司/迪斯尼	美国
6	音乐电视 亚洲频道 (MTV)	美国哥伦比亚广播公司/ 维亚康母公司	美国
7	国家地理亚洲频道 (NGC)	美国新闻集团	美国
8	卫视国际电影台 (STAR MOVIES)	美国新闻集团	美国
9	索尼动作影视娱乐频道 (AXN)	美国索尼影视娱乐公司	美国

10	探索亚洲频道 (DISCOVERY)	美国有限电视公司 (TCI)	美国
11	豪马娱乐电视网电影台 (HALLMARK)	美国豪马娱乐电视网公司	美国
12	英国广播公司世界频道 (BBC WORLD)	英国广播公司	英国
13	日本广播协会收费娱乐电视 频道 (NHK—WORLD PREMIUM)	日本广播协会	日本
14	日本娱乐电视频道 (JETV)	日本娱乐电视 股份有限公司	日本
15	法国电视五台 (TV5)	法国国家电视台	法国
16	彭博财经电视亚太频道 (BLOOMBERG)	美国彭博资讯公司	美国
17	星空卫视	美国新闻集团	美国
18	欧亚体育新闻台 (EUROSPORTSNEWS)	法国布伊格集团	法国

资料来源：国家广播电影电视总局网站

附表 2:

图：海外引进电视剧与国产电视剧播出部数、部次分布



资料来源：央视-索福瑞（CSM）

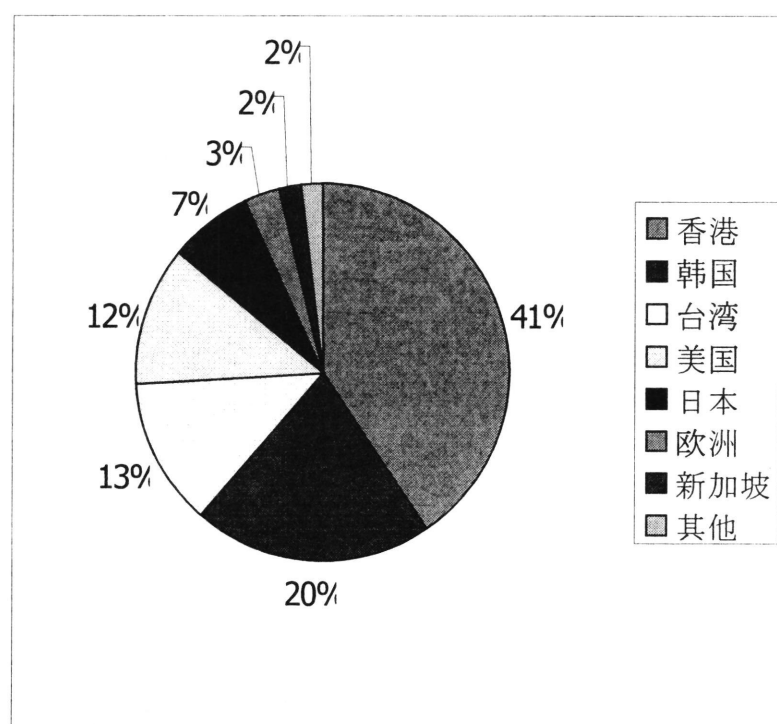
附表 3:

2002 主要电视频道播出海外电视剧来源分布

排序	国家或地区	播出部数	占全部海外引进电视剧 播出部数的百分比
1	香港	133	40.7%
2	韩国	67	20.5%
3	台湾	42	12.9%
4	美国	39	11.9%
5	日本	23	7.0%
6	欧洲	10	3.1%
7	新加坡	7	2.1%
8	其他国家和地区	6	1.8%

资料来源：央视-索福瑞（CSM）

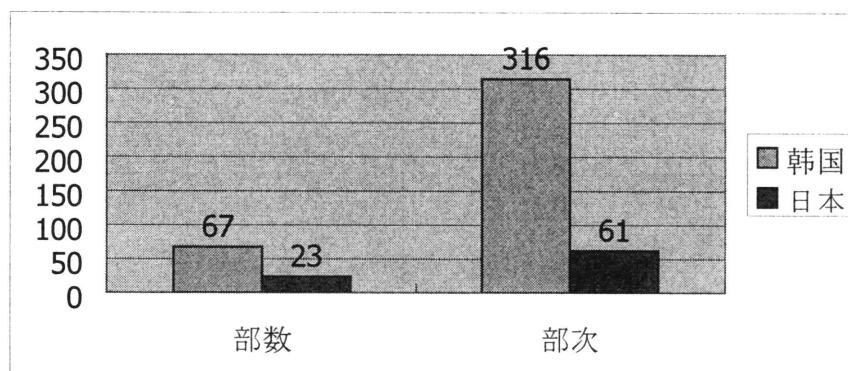
图：2002 主要电视频道播出海外电视剧来源分布比例



资料来源：央视-索福瑞（CSM）

附表 4:

图: 2002 主要电视频道韩国与日本电视剧播出部数、部次比较



资料来源: 央视-索福瑞 (CSM)

附表 5:

2002 主要电视频道播出次数最高的韩国电视剧排名 TOP10

播出次数 排名	电 视 剧	播出频道 数量	播出频道 比例	主 演
1	蓝色生死恋	21	14.3%	宋承宪、宋慧乔、 元彬、韩娜娜、 韩彩英
1	女主播的故事	21	14.3%	张东健、蔡琳、 韩载硕、金素妍
3	冬日恋歌	14	9.5%	裴永俊、崔志友、 朴素美、朴龙河
4	天涯海角	14	9.5%	柳时元、金喜善、 金浩真
5	火花	14	9.5%	李璟荣、李英爱、 车仁表

6	世纪特警	11	7.5%	金锡勋、李钟源、 金尚中、黄仁英、 李尚仁
6	青春的太阳	11	7.5%	朴尚敏、孙智昌、 李敏英、刘俊相
8	新贵公子	9	6.1%	金胜宇、崔智友、 安在旭
8	我愿意	9	6.1%	宋承宪、金圭丽
8	真相	9	6.1%	崔智宇、柳时元、 朴善英

(10) 资料来源: 央视-索福瑞 (CSM)

Introduction and Regulation:

Overseas programs in China's TV channels

Communication University of China.

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Prof. Huang Shengmin

Part I : Basic situation of Chinese TV channel

China has a large consumer market on TV programs. Till the end of 2002, There are totally 368 TV stations, 2124 channels in China. China Central TV station (CCTV) has its own 15 channels, which take up more than 60% audience rating market. Presently, Chinese big cities' residents can receive around 50 TV channels. Till the end of 2003, China has 1 billion and 167 million TV audience. TV population covered the whole 94.61%. In 2003, the average Chinese TV audience watching time is 179 minutes, which equals to 2002.

In 2003, yearly TV programs' producing times of the whole national TV channel are 1 million 791 thousand and 110 hours, in which 1 million 185 thousand and 507 hours TV programs were self-made in the TV organization system, 605 thousand and 603 hours TV programs were given to outside companies to produce, and 118 thousand and 651 hours TV programs were bought.

Among all kinds of broadcasting programs, TV drama takes up the biggest part. It takes up one forth part of the whole. The second big part is news and feature programs. In other words, TV drama, news, and feature are the top three audience rating programs. China has nationally produced 619 TV dramas including ten thousand 6 hundred and 54 episodes, and introduced 1997 overseas TV dramas including 45 thousand and 416 episodes.

Part II : The current situation for overseas TV program in China

1. Overseas programs entering ways

Currently, there are two ways for overseas TV program to enter the Chinese market: Channel settle and sale of program.

(1) The situation of overseas TV channel settlement.

For many years, China government has strictly control the receivable of overseas satellite TV program. The main restriction to overseas TV media is limited range of receivable, i.e. State Administration of Radio, Film & Television only allows hotels with 3 stars or above, overseas condominium, and needed company to apply for receivable of approved encrypted TV channel, in other words, overseas TV program does not have a large base of audience. Some overseas TV media has used this way to import TV program to China. Till the end of 2003, approved overseas-encrypted satellite channel totals 30 for 3 stars hotels and national level 2 standard above hotels that can apply for receivable. Among them, 18 are non-Hong Kong, Macao and Taiwan district. (*Appendix 1: List of approved overseas TV channel for 3 stars and above hotels (excluding channels of Hong Kong, Macao and Taiwan)*)

On the other hand, from the start of September 2001, China national telecast and TV-film bureau has taken measures to open China Southern district as special region for media. The Chinese-Entertainment Satellite Channel, which has been operated by US Time Warner after its buyout of Hong Kong Chinese-Entertainment TV, is approved to enter Canton Wire TV network as regional channel settlement. Follows on, in October 2001, national telecast and TV-film bureau has officially approved Phoenix-Chinese channel, which is operated by Hong Kong News Corporation to launch full range settlement in Zhu Jiang Triangle district. In Mar 28th 2002, US News Corporation's fully owned subsidiary "Star-Channel" is officially open in Zhu Jiang through Canton Wire TV Network. This is the first time in China that the settlement of a Wire TV Network is sold to an overseas channel.

(2) The situation of sales of overseas TV program in China.

The numbers of overseas TV channels that can be settled in China is limited, moreover those channels settled through Wire TV Network has no independent operating rights for advertisements in China, which has restricted the profits source of overseas channel. Under such policy, overseas TV media not as lucky as Time Warner and Hong Kong News Corp. can temporarily enter the China market in the form of single TV program.

Under the restriction of policy, overseas TV media use the cooperative production way but not original form to sell TV program to China. There usually have 2 methods,

For the first method, overseas media corp. first offer program materials to China TV channel as investment-cooperation or sponsorship, then the partner TV station reproduce and repackage the material before telecasting to public or sale. The example of this method is in Feb 1st 2001, CCTV has signed a 5-year contract with US Encore international Corp. As specified in the contract, CCTV will telecast all the fancy international films sponsored by Encore international in its 《Jia Yi》 TV series. In 2002, the Carton channel belongs to US online Time Warner, signed contract with CCTV to telecast their sponsored carton shows. In Dec 19th 2003, News Corp. by Muduch signed agreements with Hu Nan telecast Film-TV Corp. for cooperation of

their produced TV shows and exchange of programs. However, the above-mentioned method has forced overseas famous TV channel to give up own brand after entering China market and then provide program raw materials for repackage under the brand of Chinese TV channel for final release.

Different from the above-mentioned coop-first-then-sale methods, MTV channel etc. adopt a way to directly sell their branded program to enter China TV program market. Since MTV has set up its office in China from 1995, the 4 programs - < MTV Music Village >, < MTV Learning English >, < MTV Top Board >, < MTV Star Documents >, which comprise mainly of MTV, has covered above 38 provinces and cities TV Network and gone into 63 million families through the program exchange method gradually.

ESPN has realized its brand populization by introducing NBA, European Soccer League, etc., World famous sports into China and providing sports program to all levels of China TV stations. Besides, Discovery National Geography Channel launches its program telecast by using the built platform of inland media and program operator through cooperation.

The second type is to introduce programs by invest in some China TV program production and release company. In current situation, China TV program production and release is mainly composed of 3 parts. First, subsidiary or company directly belongs to CCTV, including China National TV Corp. and public owned CHINA TELEVISION MEDIA, LTD; Second, subsidiary of all province telecast groups; Last, the fast emerging private force, famous ones like yinhan culture communication co. ltd.beijing, guangxian and tanglong international media group media. Examples of this type: In March 2003, Viacom chose Tang Long Media as its partner to populize its produced Nickelodeon Children Channel program, which occupies 50% market in US children TV program.

Viacom transplanted the Chinese-Native 'Nickelodeon Knowledge Paradise' to the telecasting network of Tang Long and co-made the user planning for this program.

2. Overseas TV drama

AS a very important part of TV programs, TV drama holds the balance among audience rating representation, advertising incomes and broadcasting time in Chinese TV industry. According to the information in "2003 China TV rating yearbook", Chinese TV audience firstly choose news programs, and secondly TV dramas. So overseas TV dramas naturally become the main force in overseas programs on screen. According to 2003 CCTV-CSM TV drama rating report of 33 cities in Cha and 156 channels, the average rating is 3.19% during night time from 17:00 to 24:00 in all together 1601 TV dramas. There into, 175 overseas dramas, which occupy 10.93% of the whole.

(1) overseas TV drama purchasing situation in all levels TV stations in 2002

“2003 Chinese TV drama marketing report” shows 81.8% researched TV stations purchased overseas introducing TV drama in 2002. The average purchasing overseas TV dramas among them are 10.7 including 219.9 episodes that take up the whole set 14.1% and the whole episodes 13.2% during the same time.

(2) Overseas TV drama broadcasting general situation in the major TV channels during the evening periods

According to CCTV-CSM broadcasting inspection on 147 major TV channels' TV dramas in China, 132 TV channels broadcast overseas introducing TV dramas from 19:30 to 24:00 at night in 2002, which occupy the whole researched TV channels 89.8%. 132 TV channels totally broadcasted 327 overseas-introduced TV dramas at night, which occupied 22% of the whole episodes. And broadcasted 1411 times and sets overseas-introduced TV dramas including the same TV drama broadcasted in several TV channels, which took up 21% of the whole TV dramas broadcasting times and sets. (Appendix 2 and chart)

Nowadays, overseas-introduced TV dramas are broadcasted in the major provinces and cities TV satellite channels especially on the film and TV channels but less on the wireless channels.

(3) broadcasted overseas TV dramas source distributing on major TV channel

Among all 327 overseas-introduced TV dramas on major national TV channels in 2002, there are 133 sets from Hongkong, 67 from Korea, 42 from Taiwan, 39 from U.S.A, 23 from Japan, 10 from Europe (England, France, Germany, Italy, etc), 7 from Singapore, and 6 from other countries and areas. There into, Hongkong occupies 40.7% of the whole, and Korea 20.5%. (Appendix3)

There are all together 182 sets TV dramas from Hong Kong, Taiwan, and Singapore etc. on the national major TV channels, which take up 55.7% of the whole overseas TV dramas broadcasting set amounts. It does become the first big section of Chinese introducing overseas TV dramas. Korean and Japanese TV dramas take up the second big ones. There are 83% TV dramas from Chinese language countries and areas, Korea and Japan, and there are only 17% from Europe and America.

(4) Korean TV drama in China

90's last century was the golden time of Japanese TV drama. “Tokyo love story” is unforgettable to lots of audience even nowadays. Now the most popular TV dramas are from Korea. The major broadcasting Japanese TV dramas in China are 23 sets in 2002. For example, “The Midday Moon”, “Beautiful life”, and “Let's marry”. No matter the amounts or times, they are less than Korean TV dramas. (Appendix4 and Chart)

1997, CCTV2 broadcasted Korean TV drama “What is love” per episode per

week, and it started the Korean TV drama upsurge. It is an allied story between conservative family and open family, and it arose huge feedback from audience. Chinese audience is keen on this drama because of its ordinary life plots. "What is love" is the first overseas-introduced drama from Korea. After this, many other Korean TV dramas are hugely carried out on the screen.

2001, Mr. Xu Guang Chun, who is the leader of State Administration of Radio, Film & Television told Korean Culture minister when he met him in China, 'China won't limit to introduce Korean TV dramas. We are going to introduce and broadcast more Korean TV dramas in CCTV.' Current years, Korean TV dramas entered China, and soon become the second big amounts and sets after Hong Kong. Almost all the audience especially young TV audience cry for a whole year because of watching "Autumn fairy tale" and "Winter Sonata".

Now, the main Korean TV dramas in China are young love stories. bae yong jun, Ahn Jae Wook, KIM HEE SUN, SongSeungHun、 Song Hye and Jang Dong Gun become the favorite TV stars in the heart of Chinese young audience without any propaganda.(Appendix5)

Part III: Control on the imported overseas programs

Chinese government is open to introduce overseas TV programs. Overseas TV programs come to China through ways of TV dramas, features, entertaining programs, sports programs and TV advertisements. The governmental control includes several levels on whole introducing amounts, contents, countries, time, and proportion limits. Under the strong administration control, China TV not only introduce American and Japanese TV dramas as it did earlier during the reforming time, it is not blind anymore.

With the step wisely increasing overseas programs in China TV market, Chinese government's control on overseas programs tend to: 1 from the very beginning general to details on the control objects; 2 from strict to loose on the checkup system 3 persist on controlling overseas TV dramas broadcasting amounts and time on the emphasizing control.

2003, aim to some provinces make bold to receive and broadcast overseas satellite channels, it come on "notice about strictly prohibit carry overseas satellite TV programs through cable net" and "how to manage settled overseas satellite TV channels" by State Administration of Radio, Film & Television.

The State Administration of Radio, Film & Television emphasize that every TV channel could not broadcast more than 25% overseas TV drama of the whole TV dramas and films. And golden time from 19:00 to 22:00 is not available for overseas TV dramas and films. Overseas-introduced TV programs should be newly made up and edited, and they could not be broadcasted directly during a fixed time period. Words that propagandize overseas media channels could not be seen on the screen.

Epilogue

1. Overseas program play its role on China TV channel from the reforming time, and its audience rate increases year after year.
2. Things always change on introducing overseas programs according to Chinese market. Aftertime, the amount of overseas TV drama would be lower, and documentaries and feature programs would be higher. Meanwhile, those high costs produced beneficial programs and true TV stories will be popular to Chinese audience.
3. Chinese governmental policy on overseas programs would be free step by step. And the future managing emphases will change to property right and against the pirates. This is also a piece of good news for those businessmen who offer overseas programs.
4. With the appearance of national pay channel and new carrier like net TV, contents of programs need will hugely increase. But nowadays Chinese national programs producing power are too weak to satisfy this kind of large need. Therefore, for sure, future China TV market would need more overseas programs than anytime in the past.

Information Source of this article:

“2003 China TV rating yearbook”

“2004 China TV rating yearbook”

“2003-2004 China TV marketing report”

Information source: CCTV-CSM

“2003-2004 China TV marketing report”

Attachment

Appendix 1:

List of approved overseas TV channel for 3 stars and above hotels (excluding channels of Hong Kong, Macao and Taiwan)

Serial number	Satellite TV channels name	Control company	Area
1	(CNN)	Time Warner	U.S.A
2	(HBO)	Time Warner	U.S.A

3	(CINEMAX)	Time Warner	U.S.A
4	(CNBC)	NBC	U.S.A
5	(ESPN)	ABC/Disney	U.S.A
6	(MTV Asia)	CBS/Viacom	U.S.A
7	(NGC)	News Corporation	U.S.A
8	(STAR MOVIES)	News Corporation	U.S.A
9	(AXN)	SPE	U.S.A
10	(DISCOVERY)	(TCI)	U.S.A
11	(HALLMARK)	Hallmark	U.S.A
12	(BBC WORLD)	BBC	England
13	NHK—WORLD PREMIUM)	NHK	Japan
14	(JETV)	JETV	Japan
15	(TV5)	French National TV station	France
16	(BLOOMBERG)	Bloomberg	U.S.A
17	Xing Kong Wei Shi (Star)	News cooperation	U.S.A
18	(EUROSPORTSNEWS)	FBG	France

Information source: State Administration of Radio, Film & Television website

Appendix 2:

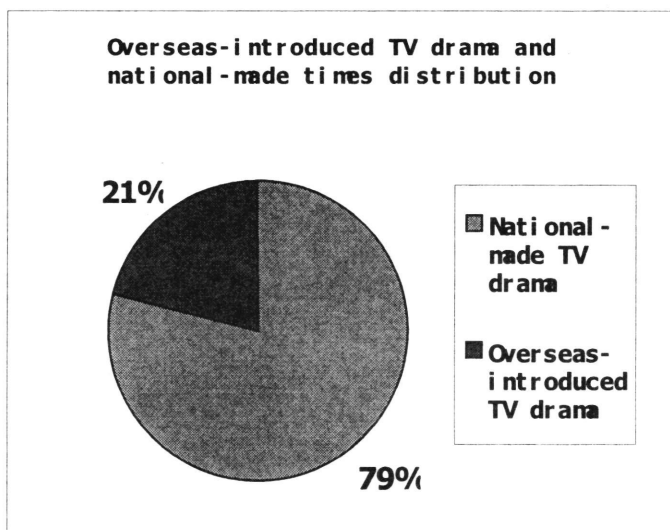
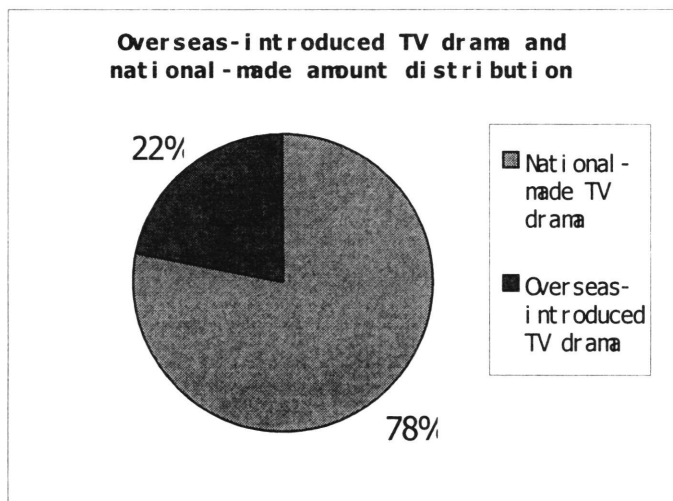


Chart: Overseas-introduced TV dramas and national-made amount and times distribution

information:CCTV-CSM

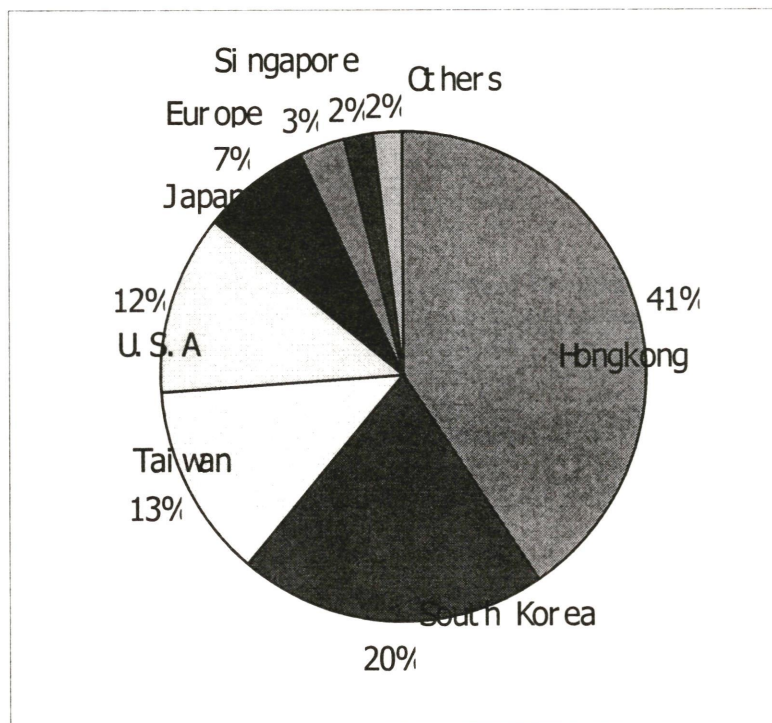
Appendix 3:

**Broadcasted overseas TV dramas source distributing on major TV channel in
2002**

Order	Country or area	Broadcasting amounts	Percentage on the whole overseas introduced TV dramas
1	Honkong	133	40.7%
2	Korea	67	20.5%
3	Taiwan	42	12.9%
4	U.S.A	39	11.9%
5	Japan	23	7.0%
6	Europe	10	3.1%
7	Singapore	7	2.1%
8	Other countries and areas	6	1.8%

Information source: CCTV-CSM

Chart: overseas TV drama source distributing proportion on major TV

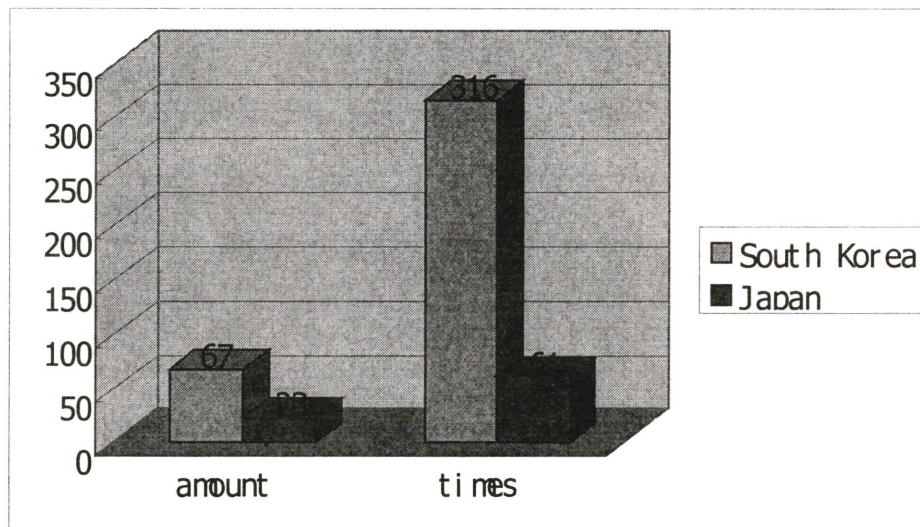


channel in 2002

Information source: CCTV-CSM

Appendix 4:

Chart: Korean TV drama compare with Japanese TV drama on amounts and broadcasting times on major TV channel in 2002



information source: CCTV-CSM

Appendix 5:

Top 10 broadcasting times of Korean TV dramas on Major TV channel in 2002

Broadcasting times order	TV drama	Broadcasting channel amount	Broadcasting channel proportion	Actors
1	Autumn fairy tale	21	14.3%	SongSeungHun、 Song Hye Kyo、 yuambin 、 Han namnam、 Han Chae-Young
1	All About Eve	21	14.3%	Jang Dong Gun、 CHAE RIM、 Han

				Jae Suk、Kim So yeon
3	Winter sonata	14	9.5%	bae yong jun、 Choi Jin Woo、 Park Yong Ha
4	Endless love	14	9.5%	KIM HEE SUN
5	Firework	14	9.5%	Lee Gyeong-yeong、 Lee Yeong-ae、 CHA IN PYO
6	Swat Police	11	7.5%	Kim Suk Hoon、 Li Shang-Jen
6	Young sun	11	7.5%	Min Young Yi
8	Mr. Duke	9	6.1%	Ahn Jae Wook Kim Seung-woo、 Choi Ji-woo、
8	Popcorn	9	6.1%	SongSeungHun
8	Truth	9	6.1%	Choi Ji-woo, Park Sun-young

Information source: CCTV-CSM

关于亚洲地区电视文化产业合作的基本观点

尤小刚

2004年11月25日

我今天不是站在一个制作公司董事长和演艺公司董事长的角度，也不是站在一个导演和制作人的角度，而是站在所从事的这个产业发展的尽可能客观的角度来发表一些基本观点。供朋友们、同仁们参考。

电视是上世纪下半叶至本世纪的传播性最为广泛与深入的大众传媒，可以说在传媒中具有无可比拟的地位，但是各个国家的电视节目内容的构成是不相同的，可以说更具有民族和地域特色，这种特色虽然不是全球性的，但是在东方文化背景和发展速度的基础上，具有跨国的区域共性是毫无疑问的，这里我们先把电影和电视的产业现状作一个比较。

一、电影——从十九世纪电影出现以来，经历了从杂耍到戏剧，从人文到科幻等剧变性的发展，成了人类文化的重要组成部分，但我们应当清楚地看到，就产业而言，由于美国好莱坞从开始就致力于建立市场架构，并通过不断地扩张与兼并，已经形成了成熟的电影市场结构，成为电影发行的主渠道。所以无论电影艺术的各流派如何探索与实践，但是要想真正能够形成观众的消费，就必须被容纳进这个产业的主渠道，这个事实是无争的，电影的制作与推广已经真正的跨国化、产业化了。人类文化发展的这个机遇，通过产业化和跨国化被美国实实在在地抓住了。

二、电视——这是传媒的重大发展，是新世纪的宠儿。其承载的内容和传播的广泛，至少在目前是无法比拟的。虽然网络的兴起速度很快，但涉及到知识产权，就东方国家，尤其是亚洲的东亚与东南亚而言，其最受欢迎，消费群体最大的电视连续剧，在网络上不可能成主体，而在电视播出中却有不可替代的霸主地位。就其生产量和生产质量而言，由于电影人的介入，其从业人员素质

和数量近年来都有长足的提高与发展。在中国、韩国、日本、东南亚各国，电视连续剧的需求量都十分之大，这也是电视传媒赢得广告效益的主要载体。这是亚洲文化的产业机遇，因为这些国家和地区具有东方文化背景，历史悠久，故事文化是其基础文化，人情故事是其关注所在，有着我们常说的“看戏”的习惯，这和西方文化背景是不同的，重视家庭娱乐形式的东方人，对看电视连续剧是乐此不疲的，这就是市场消费的基本条件，如果我们不抓住这个机遇，开放我们的观念，展开亚洲电视文化产业的跨国合作，共同开发市场，就可能会让其他资本捷足先登，占尽商机，那时就悔之不及。

在就亚洲而言，虽然有共同的需求，但由于电视媒体的封闭与落后的保守观念，力图想形成封闭式的传播形态，所以虽然有电视剧播出与发行的买卖但是只停留在选择性进口与出口的小买卖形态，规模与产业水平都比较低下，如早期日本电视剧在中国的进口，港台地区电视剧在中国的进口，现在韩国家庭情感电视剧在中国的进口，其规模小，播放时段差，流行时效短，出口当然也包括中国电视剧出口海外，显示出亚洲各国和地区的电视剧买卖，都属于小规模低水平，如果我们就此而沾沾自喜，那就应了中国有个古老的寓言“井蛙观天”，身在井下，不知天大。其实保守的形态是阻挡不了西方的跨国资本输入方式的，如果电视传媒和电视制作业不能共同认识到发展的机遇和保守的危机，还以此现状而自我陶醉的话，那就是可怕的疏忽了。就电视剧形态而言，亚洲地区各国实现跨国合作的可能性是完全存在的，就各国的历史题材而言，历史中有交融的人物与事件，可以合作，就武侠题材而言，更无障碍，特别应当注意到的是现实都市题材，由于自上世纪七十年代以来，东亚、东南亚各国的观念进步，经济起飞的结果，目前这些国家都市的经济和文化发展水平都很快，生活与情感的状态与矛盾基本处于同一程度，有强烈的共性，因此这类题材的故事和观众群完全可以泛国际化，这就是跨国合作的基础，各国观众有近似的消费观赏习惯和心理。这样的合作应当是国际化、市场化的，而不是简单的文化交流性的制作合作，是充分发挥各国电视传媒和制作商在各自市场上的优势进行的市场化合作，这样至少有几大益处：

- 1、在共同创作的前提下，必然导致文化的交流。

- 2、在共同投资的前提下，必然导致资本实力的增强和成本的降低。
- 3、在共同销售的前提下，必然导致市场收益的增长。
- 4、在共同制作的前提下，必然导致制作人员水平的提高。
- 5、在共同演出的前提下，必然导致演员、导演等主要艺术人材知名度的推广与能力的提高。

因此，这种合作应是在市场合作前提下的产业化推进。观念的解放是产业发展的前提，保守是不可能前途的，亚洲各国的电视产业成员应当以国际间跨国合作的姿态，开发规模化市场，尊重产业发展的基本规律，紧紧把握电视这个人类文化发展的新契机，电视传媒产业是内容产业，在内容制造上展开了合作，就抓住了电视产业发展的根本环节，同时这些内容也同样是网络产业的根本环节。

技术因素——类似语言交流，同期声的补配处理，制式等方面的问题，其实在现有技术手段的水平下，都是很容易解决的，即使是美国好莱坞的影片也同样有至少 30%的同期声补配处理，这些问题都不应成为跨国合作的障碍，除非是以此为保守作法的托辞而已。

我深深地呼吁亚洲各国的电视文化产业的同仁们紧紧抓住历史赐予我们的良机。

On Cooperations within the TV Culture Industry of Asia

Xiaogang Yiu

Today, I'm speaking here not from the perspective either of a production company's president or of an entertainment company's chairman, not even from the standpoint either of a director or a producer, but from a tentatively objective viewpoint required for the development of our TV culture industry. My main ideas are given for your reference.

From the second half of the 20th century, TV has become the most popular and widely accepted kind of mass media, with a vital position that nothing else can match it. Strongly characterized by national and regional colors, TV programs of one country differ from those of another in the composition of contents. Without doubt, however, these characteristics, though not global, have something in common within a region, due to a similar cultural of Asia and its speed of economic development. Now, in the first place, let's make a comparison between the situation of movie industry and that of TV culture industry.

1. Movie, beginning from its appearance in the 19th century, has undergone huge development from a variety show to drama, from themes of humanities to those of science fiction and has become an important part of human culture. We should realize, however, that as far as the movie industry is concerned, the Hollywood has worked on a market structure from the very beginning and a mature network of market, a principal channel of movie circulation, has been well established, after the continuous expanding and annexing. Therefore, no matter how a school of movie art explores and practices, it has to get into the mainstream of this industry as long as it wants to have its audience and consumers. It is a known fact that the movie production and promotion is somewhat internationalized and industrialized. The United States has thus grasped this opportunity of human culture development.

2. TV, a great development of the media and a favorite of the new century, has carried so many contents and spread at such a speed that nothing else can match it so far. In the Eastern countries, especially in the eastern Asia and the southeastern Asia, TV drama is most popular and has the largest percentage of consumers. Although wet industry develops very fast, it cannot, for the sake of intellectual property issues, possibly replace TV which still plays the dominant role of broadcasting TV programs. As far as the quantity and quality of TV programs are concerned, they are now greatly improved and this is the same case with the specialists of TV culture industry, due to the participation of movie experts and stars. In China, South Korea, Japan and other countries of southeastern Asia, there is an incredible demand for TV series. TV series have become the main means by which TV media get benefits from advertisements. This is the good opportunity for TV culture industry of Asian countries and regions who share an oriental cultural background as well as a long history. The fundamental part of oriental culture is story-culture and the audience's concern lies in the stories of people. The Asian people put much stress on domestic entertainment and they never get bored with TV series, which is the basic condition of TV consuming market. If we cannot take this advantage and broaden our mind to initiate the international cooperation within the Asian TV culture industry and to establish the market together, it'd be too late for us to regret when other capital investors take the opportunity.

As far as Asia is concerned, despite the same demand for TV series, the TV media, with closed and conventional concepts, has always attempted to stop at a confined form of

transmission. Consequently, the businesses of transmission and circulation of TV programs have always been restricted to the limited imports and exports of a small scale and low industrial level. For example, China's early imports of TV drama from Japan and Hong Kong as well as the present imports of TV series about family and love from South Korea are not at all satisfying because of the small scale, non-prime time of broadcasting and short-lived popularity. Generally speaking, the TV drama exports of Asian countries including those of China are all small scaled and not qualified enough. If self-conceited with what we have achieved, we'll turn out the ridiculous frog in an old Chinese allegory, who sits at the bottom of the well, ignorant of a boundless sky. In fact, conservative minds never can prevent the western capital expansion. If the circles of TV media and production fail to realize the opportunities of development as well as the crisis of remaining conservative and self-conceited, there will be a terrible neglect. Referring to TV drama itself, there are much possibility for international cooperation within Asian countries and regions. For example, there's no problem with the joint-drama of a historical subject, which deals with events and people, not to mention the gongfu drama. Special attention should be, however, given to the subjects of urban life. Since the 1970's, concepts and economy of East Asia and Southeast Asia have developed rapidly. Nowadays, economy and culture in the urban cities of these two areas are all developing dramatically. Life and emotional state, problems and contradictions are basically at a same degree, which constitutes something in common. Therefore, it is safe to say that stories of these subjects and the audience can well be internationalized. Audiences in these areas have similar preference and psychology of consumption and appreciation, which is the very base for our cooperation. This cooperation should be international and based on the market. It is far beyond the joint-production as simple exchange of culture; it is the cooperation in market by fully developing advantages of TV media and producers of each country in their own market. The advantages of such cooperation are as follows:

- (1) With the joint-creation, it will promote exchange of culture.
- (2) With the joint-investment, it will reinforce the capital strength and reduce the cost.
- (3) With the joint-sale, it will increase the profits of market.
- (4) With the joint-production, it will raise the level of producing staff.
- (5) With the joint-performing, it will help stars, directors and other professionals of concern with their art and meanwhile increase their popularity.

Cooperation of this kind, therefore, will be a great leap of TV culture industry under the condition of a joint-market, which will merely be achieved on the basis of the liberation of our concept, for conservativeness has no future. Members of TV culture industry throughout Asia must take the posture of international cooperation, open up the standardized market, follow the fundamental rules of industrial development, and, take the opportunity of TV media as a means of developing human culture. TV media industry is an industry of contents. To cooperate on contents production is a way to grasp the basic point of TV industrial development and even of web industry.

As for the technical problems concerning different languages, simultaneous sound processing, recording systems and etc, it is very easy to solve with the help of the advanced technology available nowadays. Even the American Hollywood movies will also have no less than 30% of simultaneous sound processing. The technical problems cannot be the obstacles of international cooperation unless conservatives would like to use them as excuses.

Now, I would like very much to call on members of TV culture industry of Asia to take the good opportunity granted by our history and never let it slip.

아시아지역 TV 문화산업협력에 대한 기본 관점

저는 오늘 한 제작회사의 이사장이나 연예회사의 이사장 혹은 감독이나 제작자의 관점이 아닌 단지 이 산업의 발전을 위해 최대한 객관적인 관점에서 몇 가지 저의 관점을 발표하고자 하오니, 내빈 분들과 동료 분들은 참고해 주시기 바랍니다.

TV 는 지난 세기 하반부부터 현세기까지 전파성이 가장 광범위한 매스컴입니다. 여러 매체들 중에 비교할 수 없는 위치에 섰다고 해도 과언이 아닙니다. 하지만 각 국가의 TV 프로그램내용구성은 조금씩 다릅니다. 말하자면 더욱 짙은 민족적 지역적 특색을 가지고 있기 때문이라고 말할 수 있을 것입니다. 이러한 특색은 비록 글로벌 한 것은 아니지만 동방문화라는 문화적 배경과 경제발전속도라는 기초 위에서 아시아 지역의 공통성을 가지고 있다는 것에 대해서는 의심할 여지는 없을 것입니다. 이제 전 먼저 영화와 텔레비전의 산업현황에 대해 비교를 해 보고자 합니다.

1. 영화- 19 세기 영화가 출현한 이래, 잡기부터 코미디까지, 인문에서 SF까지의 발전을 거쳐 영화는 인류문화의 중요한 구성부분이 되었습니다. 그러나 하나의 산업을 놓고 말할 때 미국 할리우드는 시작단계부터 시장구조를 만드는 데에 주력하였고 또한 부단한 확장과 합병을 통하여 이미 성숙된 영화시장구조를 형성하였으며 영화제작의 “주류”로 부상했다는 점을 명확히 알아두어야 합니다. 때문에 영화예술의 각 파가 어떠한 노력을 하든지 간에 진정 관중의 영화에 대한 소비를 이끌어내고자 한다면 반드시 이 산업의 주류와 융합되어야 하는 사실만큼은 의심할 여지가 없을 것입니다. 영화의 제작과 보급은 이미 글로벌화와 산업화가 되었습니다. 인류문화발전의 이러한 기회는 산업화와 글로벌화를 통하여 이미 미국이 거머쥔 것입니다.

2. TV- TV 는 매스컴의 중대한 발전이자 현재 새로운 세기의 사랑을 듬뿍 받고 있습니다. 그 담고 있는 내용이나 광범위한 전파범위에서 볼 때 적어도 현재까지 비교될 수 있는 매체는 없을 것입니다. 비록 인터넷이 빠른 속도로 발전하고 있다고는 하지만 이는 지적재산권에 연관이 됩니다. 동방국가, 특히 아시아대륙의 동아시아와 동남아시아 같은 경우, 가장 인기가 좋고 가장 큰 소비자 군을 가지고 있는 TV 드라마는 인터넷에서는 주류가 될 수는 없지만 TV 에서는 바꿀 수 없는 패자의 지위를 가지고 있습니다. 또 그 생산량과 생산 수준에 있어서도 영화인들의 개입으로 인해 종사자들의 수준과 수량은 최근 장족의 향상과 발전을 이루었습니다. 중국, 한국, 일본, 동남아각국에서 TV 연속극의 수요량은 매우 크고, 이는 TV 매스컴이 광고수익을 얻는 주요 수단이 됩니다. 이것은 아시아문화산업의 기회라고 할 수 있습니다. 왜냐하면 이런 국가와 지역이 보유하고 있는 동방문화라는 배경, 유구한 역사, 그리고 이야기문화는 기본적으로 비슷한 문화 형태를 보유하고 있으며, 인정(人精)을 다룬 이야기는 모든 사람이 관심을 갖는 화제이기 때문입니다. 이것이 바로 우리가 흔히 말하는 <극을 보는> 습관이며 서방의 문화배경과는 사뭇 다르다고 할 수 있습니다. 가족오락형식을 중시하는 동방 인으로써 드라마에 대한 애착은 끝이 없습니다. 이것이 바로 시장소비의 기본조건이기도 합니다. 만약 우리가 이런 기회를 붙잡지 못하고 우리가 열린 생각을 갖지 않고, 아시아 TV 문화산업의 다국적 협력을 전개하여 공동으로 시장을 개발하지 않는다면 다른 자본에 의해서 이런 기회를 빼앗길 수도 있을 것입니다. 아마 그때의 후회는 이미 늦은 것일 겁니다.

아시아를 놓고 말할 때 비록 공동의 수요가 있긴 하지만 TV 매스컴의 붕쇄와 낙후된 보수적인 관념들로 인해 폐쇄적 매스컴환경을 형성하고 있습니다. 그래서 비록 드라마의 제작과 거래는 존재하긴 하지만 선택적 수,출입의 소규모 거래 형태에 머물고 있습니다. 규모와 산업수준 역시 여전히 낮습니다. 예를 들면 초기의 일본이나 홍콩, 타이완지역의 드라마수입이나, 현재의 한국드라마 수입 역시 모두 규모가 작고 방송 시간대 역시 좋지 않으며 유행기간 역시 짧은 편입니다. 중국드라마의 해외수출도 마찬가지로 규모가 작고 수준 역시 비교적 낮습니다.

만일 우리가 이런 현실에 만족을 한다면 바로 “우물 안의 개구리”와 같게 될 것입니다. 하늘이 얼마나 큰지를 모르겠지요. 실제로 보수적인 사고로는 서방

다국적 자본의 진입을 막을 수 없습니다. 만일 TV 매스컴과 TV 제작업이 공동으로 발전할 수 있는 기회와 보수적 사고가 가져다 주는 위기를 인식하지 못하고 현실에 만족한다면 필히 부정적 결과를 초래할 수 밖에 없습니다. 드라마로 놓고 볼 때 아시아 각국이 협력을 실현할 가능성은 충분히 존재합니다. 각국의 역사주제에 대해 말하면 역사 중 다른 국가와 교류를 진행한 인물과 사건에 대해 협력을 진행할 수 있고 액션드라마는 더욱이 아무런 어려움이 없을 것입니다. 특히 현실에 부합되는 도시문화를 중심으로 하는 소재에 대해 관심을 돌려야 한다고 생각합니다. 20 세기 70 년대 이후 동아시아와 동남아시아 각국의 관념은 경제발전의 영향하에 빠른 속도로 진보화 되었으며 현재 이러한 국가, 도시의 경제와 문화발전은 아주 빠르며 생활과 사고방식도 서로 많이 일치하는 부분이 있습니다. 때문에 이런 소재의 이야기 줄거리로써 시청자는 완전히 지역국제화를 실현 시킬 수 있습니다. 또한 이것이 바로 다국적 협력의 기본이기도 합니다. 각국 시청자들은 유사한 시각과 심리를 가지고 있습니다. 때문에 이러한 협력은 당연히 국제화 되고 시장화 되어야 하며 간단한 문화교류형식의 제작협력이어서는 안되며 충분히 각국 TV 매스컴과 제작상의 장점을 살리는 협력이어야 합니다.

만일 이렇게 된다면 아래와 같은 장점이 있습니다.

1. 공동으로 제작할 경우, 반드시 문화교류를 촉진 시킬 것입니다.
2. 공동으로 투자할 경우, 반드시 자본능력이 강화되어 원가가 낮아질 것입니다.
3. 공동으로 판매할 경우, 반드시 시장의 수익신장을 가져올 것입니다.
4. 공동으로 제작할 경우, 반드시 제작인원의 수준향상을 가져올 것입니다..
5. 공동으로 연출할 경우, 반드시 배우, 감독 등 많은 예술인들의 지명도와 능력을 높일 수 있을 것입니다.

이 때문에 이러한 협력은 반드시 시장협력의 전제하에서 산업화로 추진되어야 합니다. 개방적 사고는 산업발전의 전제요, 과거지향적 사고로는 앞날이 밝다고 말할 수 없습니다. 아시아 각국의 TV 산업 종사하는 동료 분들은 마땅히 국제간 다국적 협력형태로써 규모화된 시장을 개발하고, 시장발전의 기본규율을 존중하여, TV 라는 인류문화발전의 좋은 기회를 반드시 놓치지 말아야 할 것입니다. TV 대중매체산업은 바로 콘텐츠산업입니다. 이런 콘텐츠제작에서부터 협력을 시작한다면 TV 산업발전의

근본 틀을 잡은 것과 다름없습니다. 동시에 이런 내용은 인터넷산업의 근본 틀이기도 될 것입니다.

기술 요소- 언어교류, 동기음의 보충과 분배처리, 제작방식 등의 문제는 현재 보유기술상에서 아주 쉽게 해결할 수 있습니다. 미국 할리우드 영화도 마찬가지로 최소 30%는 동기음보충배분처리를 진행하여야 합니다. 이런 문제는 결코 다국적협력의 장애가 되진 않습니다.

끝으로 저는 매우 깊이 아시아 각국의 TV 문화산업의 동료 분들이 이 역사적 기회를 잘 살려 우리모두에게 좋은 기회가 되길 호소하는 바입니다.

감사합니다.

유샤오강

2004年11月14日

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in cooperation with Korea Independent Production Association, Music Industry Association of Korea, Korean Film Council, Korea Animation Producers Association, and CFORUM