

International Conference

Global Cultural Industry at the Crossroads: Europe and Asia

recherche



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Samedi 7 décembre
2019
8h30-19h00
Amphi 2

Inalco
65 rue des Grands
moulins
75013 Paris

Organisateurs :
Stéphane Thévenet, Jimmyn Parc

Program

December 7, 2019, Institut National des Langues et Civilisations
Orientales (Inalco)
Amphi 2, 65, rue des Grands Moulins, 75013 Paris

8:30 AM – 9:00 AM

Registration

9:00 AM – 9:30 AM

Opening ceremony

Opening remarks 1: Peter Stockinger (Inalco)

Opening remarks 2: Patrick Messerlin (Sciences Po Paris)

Keynote speech: Nissim Otmazgin (The Hebrew University of
Jerusalem)

9:30 AM – 11:00 AM

1st Session-Asian-Pacific Film Industries 1

1. Sean O'Reilly-The Resurgent Right: The Secret of Japan's
Twenty-first Century Cinematic Success
2. Takashi Uchiyama-"Laissez-Faire" Market: Japanese Film
Industry and Government Policies
3. Jimmyn Parc: The Transformation of the New Zealand Film
Industry Facing the Dominance of US Films and its Implications
for the World

11:00 AM – 11:15 AM: Coffee and Tea Break

11:15 AM – 12:45 PM

2nd Session-Asian-Pacific Film Industries 2

1. Kyuchan Kim: Asia On-Demand: Policy and Business Implications
from Singapore and South Korea
2. Jooyoung Kwak: Industry Transformation after Market Opening:
Korea and China in the Film Sector
3. Hwy-Chang Moon: Revitalizing Chinese Film Industry through
Internationalization Policy

12:45 PM – 1:30 PM: Lunch

1:30 PM – 3:00 PM

3rd Session: European Cultural Industries 1

1. Victoria Barker-Enhancing the Cultural Industries of Europe through an Ecosystem Approach
2. Jimmyn Parc-How Has Co-Production Been Exploited by State: The European Experience
3. Ivana Kostovska-The rise of the 'Netflix tax' and what it means for sustaining European audiovisual markets

3:00 PM – 3:15 PM: Coffee and Tea Break

3:15 PM – 4:45 PM

4th Session: European Cultural Industries 2

1. Brian Yecies-The Challenge of Korean Webtoons for Europe's Creative Industries: Digital Innovations and the "Infinite Canvas"
2. Stephen Ranger-Declining Competitiveness in the Film Industry: The British Experience in Japan, 1910-1923
3. Jens Ulff-Møller-France and the U.S.: American and European Policies toward the Motion Picture Industry 1945-1971
4. Patrick Messerlin-The Myth of Subsidies in the Film Industry: A Comparative Analysis of European and US Approaches

4:45 PM – 5:00 PM

Closing Ceremonies

Hwy-Chang Moon (Seoul National University and Seoul Business School, aSSIST)

5:00 PM – 5:30 PM: Refreshments and Networking

7:00 PM: Congressional Dinner (invitees only)

Abstracts

1st Session-Asian-Pacific Film Industries 1

The Resurgent Right: The Secret of Japan's Twenty-first Century Cinematic Success

Sean O'Reilly, PhD (Akita International University)

In the last half-century, virtually all the world's national cinemas lost majority box office share to Hollywood. In the late twentieth century, Japan's film industry also wilted before Hollywood's onslaught, yet rebounded, beating American films' box office earnings every year since 2006. What factors can explain Japan's cinematic renaissance? The usual answer is "anime" (animated films/live-action remakes), but there is another pillar propping up the film industry: revisionist, right-wing history films, often made with powerful ultra-right backers.

The centrist, optimistic future-oriented ethos has receded (in cinema and throughout the entire culture-industrial complex), replaced with a re-energized reactionary worldview, which looks to Japan's warlike past with affirmation and longing. Therefore, a new extremist 'mainstream' has emerged, one in which Japan's future looks increasingly bleak, and her past ever more appealing. Drawing on filmic as well as related Japanese-language sources, this article examines several twenty-first century Japanese blockbusters and the industrial conditions of production. Its conclusion is that if audiences continue to endorse this extremist right-wing vision of the once and future Japan, Hollywood is unlikely to reclaim its crown there.

"Laissez-Faire" Market: Japanese Film Industry and Government Policies

Takashi Uchiyama (Aoyama Gakuin University)

Since the end of World War II, there were no regulations or promotional policies in Japan toward its film industry like in

Europe. No import, screen and production (independent) quota rules, no obligations for TV networks and stations to invest films, no special tax benefits and subsidies on film and TV industry, loose content-regulations on TV programs and advertising. Simply, a “laissez-faire” market existed. Throughout the twentieth century, the Japanese government, film, and TV industry were not concerned about “the invasion of Hollywood.” But we should take into account the difference in the environment, particularly between Hollywood and Japan which is so vast (the theory of cultural discount). The Japanese market is protected by unique language and culture which has led to strong concerns about export promotion and the need for new competitive industries in long term. Since 2012, a number of political resources have been invested in this sector, although the amount has been limited.

The Transformation of the New Zealand Film Industry Facing the Dominance of US Films and its Implications for the World

Jimmy Parc, PhD (Sciences Po Paris and Seoul National University)

This paper analyzes how the New Zealand film industry has evolved from a “hermit kingdom” to a “filmmaking kingdom” in the face of dominance from Hollywood films in its domestic market. This success is due to new business strategies: internationalization of production and consumption, fostering created resources for filmmaking business, and business and economic approach instead of focusing on solely cultural approaches. Behind this, was a paradigm shift in perceptions of the film industry: from producing “end product” to participating in “product making” and collaboration with the Hollywood film industry instead of engaging in competition. All of these endeavors helped New Zealand to foster a business-friendly ecosystem for the film industry. However, its government’s incentive regime may in the future limit the further take-off of the New Zealand film industry. This regime should be redesigned to enhance its international competitiveness and to take the industry to the next level.

2nd Session-Asian-Pacific Film Industries 2

Asia On-Demand: Policy and Business Implications from Singapore and South Korea

Yeon W. Lee (Seoul School of Integrated Science and Technology) and Kyuchan Kim, PhD (Korea Culture and Tourism Institute)

The film and contents industries are being reshaped, not only by their producers but by US on-demand platforms such as Netflix and Amazon Prime, which is transforming the media industries throughout the world. This paper delves into the recent dynamics in the film industry by comparing the brief history and current business developments in Singapore and South Korea's film industry. Singapore and South Korea are two leading countries in Asia in terms of economic power while also being the top two markets with the highest film attendance rates. Despite the similarities, however, the two countries have different degrees and trajectories of development in film and content production and distribution. For instance, Korea has a relatively strong competency in film and contents production in Asia while Singapore has built its own distribution platform that is expanding throughout Asia and the world. The two different cases offer meaningful strategic options to the current situation where if the industry activities are broken down into different types of functions, then there is more flexibility for cooperation and complementarity. As testbeds to global contents, Singapore and South Korea are important markets that function as gateways, and this research will show how Asia is on-demand for more diverse contents, both domestic and global, and thus that businesses and policies should be constructed accordingly in directions to enhance value to consumers and businesses.

Industry Transformation after Market Opening: Korea and China in the Film Sector

Byung-il Choi, PhD (Ewha Womans University) and Jooyoung Kwak, PhD (Yonsei University)

The film industry, as a core part of the creative industries, has faced strong pressure from globalization and subsequently market opening. Domestic concerns were raised for fear that this would weaken local production and decrease cultural diversity. Since market opening was demanded mainly by Hollywood - the powerhouse of the global film industry, Asian countries resisted to protect the local film sector and national culture. Our study investigates what has followed in the domestic film industry after market opening. Specifically, we compare China and Korea because they are known for their creative industries in Asia, particularly film production. The two countries have promoted local film production by setting an import quota (for China) and the mandatory screening duration (for Korea and China), respectively. The analysis here is based on archive data including statistics, policy documents, newspapers and magazines, and the industry reports. Using the descriptive analysis, we examine the industrial transformation that happened in each domestic market as a response to the opening. In particular, the focus is broadly threefold: changes in the dimension of cultural diversity, challenges for local film production, and the policy dilemma. In this respect, we present cross-country comparisons between China and Korea and discuss the effects of market opening in the film industry on the competitiveness and cultural diversity. Our preliminary findings are that, while opening of the domestic film market brought different effects, two countries commonly experienced strengthened commercialization rather than weakened cultural diversity, and polarized local film production in terms of resource allocation.

Revitalizing the Chinese Film Industry through Internationalization and Interplay with Hollywood Films

Hwy-Chang Moon, PhD (Seoul School of Integrated Sciences and Technologies and Seoul National University) and Wenyan Yin, PhD (Seoul School of Integrated Sciences and Technologies)

The Chinese government's internationalization policies, particularly its engagement strategy with Hollywood, have made significant contributions to the development of the Chinese film industry. Despite the growing trend of collaborations with Hollywood studios, preceding studies mainly stress the competitive relationship, and the government's resistance to the expansion of foreign firms' involvement in the film industry through protectionist policies. By contrast, this paper conducts a competitiveness approach to analyzing the drivers behind this relationship with Hollywood filmmakers. This paper argues that the collaboration with Hollywood has been crucial for enhancing the competitiveness of the Chinese film industry. The strengthened Chinese competitiveness has also affected the strategy of Hollywood to access the Chinese market. Based on the analysis of the Chinese government's policy toward foreign firms, this paper further provides useful implications for other developing countries in improving their cultural industry.

3rd Session: European Cultural Industries 1

Enhancing the Cultural Industries of Europe through an Ecosystem Approach

Victoria Barker, PhD (University of Derby)

This paper asks whether a 'creative and cultural ecosystem' approach can offer a clearer understanding of business in the cultural industries, drawing from developing literatures and frameworks on cultural and entrepreneurial ecosystems, and using illustrations from UK creative industry micro-enterprises. European cultural policy takes into account both the economic and the soft power of culture. In the UK, cultural policies over the

past twenty years has tended toward the 'creative industries,' firmly positioning the sector within the economic agenda and developing a discrete and contested view of the 'business of culture'. The focus on economic growth is increasingly seen as problematic in a sector that necessarily depends on intangible and symbolic approaches to value. Despite the 'ecosystem' term gaining traction in cultural policy discourse, there has yet been no tested framework in the creative and cultural context. This paper asks whether the emerging concept of the ecosystem can capture a broader range of driving values for business, and thus enhance a policy understanding of the sector. It does so by drawing from a study in which an ecosystem model was developed from business and entrepreneurial literatures and applied to UK creative industries data and case studies to investigate its potential. In this regard, the paper suggests that an ecosystem approach is useful in seeking to better understand the rich web of connections between audiences, content creators, business and policy.

How Has Co-Production Been Exploited by State: The European Experience

Jimmy Parc, PhD (Sciences Po Paris and Seoul National University)

In the era of globalization, goods and services have become 'made-in-international' and co-production in the film industry is part of this trend. As a way to revive their film industries, several European countries have developed projects for co-production. This approach has been perceived positively, spreading across Europe and beyond. In contrast to this conventional view, this paper argues that co-production may not actually be beneficial for the European film industry. Specifically, this paper distinguishes 'international co-production,' as 'corporation-led' and 'state-led' co-production. Corporation-led coproduction is based on business activities to achieve the best outcome whereas state-led co-production has been used to boost the national image and input nationalism into films. In addition, governments believe that such an approach is justified if the number of films

produced increases. In reality though, state-led co-production hinders the development of the domestic film industry. It has induced foreign companies to abuse this regime as a way to avoid various protectionist measures while benefitting from local subsidies for coproduction. All of these aspects can be found throughout the history of Europe's co-production efforts. In the future, such an instrument should be carefully designed in order to promote the film industry more effectively.

The rise of the 'Netflix tax' and what it means for sustaining European audiovisual markets

Ivana Kostovska, PhD candidate (Vrije Universiteit Brussel), Tim Raats, PhD (Vrije Universiteit Brussel), Karen Donders, PhD (Vrije Universiteit Brussel)

This paper provides new and more holistic perspective on observing the 'Netflix taxes' in Europe, as part of audiovisual policy toolkits. It builds on a comparative case study research of four EU countries which have imposed "Netflix taxes" – France, Germany, Belgium and Italy. In this respect, it examines to what extent the introduced investment obligations are actually futureproof as part of developing long-term sustainable policy toolkits. We argue that the introduction of 'Netflix taxes' can be observed in the context of restructured schemes in the national audiovisual policy toolkits as an endeavor to find sustainable audiovisual funding strategy. Our findings suggest that 'Netflix taxes' are designed to compensate for the decreasing volumes of revenue, integrate new players and to reduce the regulatory burden on traditional players. Secondly, the research findings indicate that 'Netflix taxes' are introduced as trials and are yet in an experimental phase. Finally, we identify motives for introducing the 'Netflix taxes' which we categorize as: economic (supporting industries, sustaining content); cultural (protecting national cultural output); legal (levelling the playing field, reducing legal differences between players); technological reasons (adapt to new technological developments); and reasons related to internationalisation/cooperation (improve the

international orientation of local filmmaking).

4th Session: European Cultural Industries 2

The Challenge of Korean Webtoons for Europe's Creative Industries: Digital Innovations and the "Infinite Canvas"

Brian Yecies, PhD (University of Wollongong) and Ae-Gyung Shim, Ph.D. (University of Wollongong)

This study seeks to foster discussion about Europe's cultural industries by exploring the innovative approach to digital comics – production, distribution, transcreation and reception – that is transforming the webtoon industry. In order to introduce one of the fastest-growing sectors of the global cultural industries to European readers and stakeholders, the authors first sketch the rise of Korean webtoon platforms and then analyze their global expansion via a large cohort of fan-translators. They then show how the French webtoon platform Delitoon has been incorporated into these developments in previously unrecognized ways. Finally, an analysis of the romance webtoon, *Cheese in the Trap*, and its transmedia adaptations update existing approaches to "global media flows" (Black, Epstein and Tokita 2010), "soft power" (Chua 2012) and media convergence (Jenkins 2006). We invoke the concept of "infinite canvas" (McCloud 2000) by offering content creators ideas for approaching new digital readerships in this rapidly transforming sector and setting out some of the challenges that it poses for traditional screen media content and formats.

Declining Competitiveness in the Film Industry: The British Experience in Japan, 1910-1923

Stephen Ranger, PhD candidate (University of Turku and ECIPE)

Throughout the 1900s, Britain and Japan enjoyed a close diplomatic relationship that was best exemplified by their alliance of twenty years (1903-1923). Cultural ties during this period

though were more distant. The Japan-British Exhibition of 1910 produced mixed results toward enhancing cultural exchanges. Despite this complex situation, British film companies were active in Japan during the 1910s. However, their competitiveness would weaken to the extent that they were eventually displaced by the Hollywood studios by the 1920s. Against this backdrop, Anglo-Japanese relations also became more distant as their alliance faded away without further renewal in 1923. This paper examines the factors behind the British film industry's struggles in Japan that seem to correlate with the final chapter of the close political relationship. To what extent did the changing nature of the Anglo-Japanese alliance have an impact on cultural ties? Why did the Hollywood studios have more success than the British companies in the Japanese film market? Did growing nationalism in Japan distort the film market? And ultimately how did British film policies affect its presence in Japan? In addressing these questions, this paper will explore the impact of a changing political environment alongside the negative effects of British film policies.

France and the U.S.: American and European Policies toward the Motion Picture Industry 1945-1971

Jens Ulff-Møller, PhD (author and independent scholar)

Hollywood usually explains its success in exports as resulting from preference among consumers toward American films. Film historians, on the other hand, believe that Hollywood's success is due to the size of the American market, and the standardised mass production of the Hollywood studio system. In contrast to these views, my focus is on the importance of the diplomatic support from the US State Department and its embassies toward the Motion Picture Export Association of America (MPEA) that ensured its international dominance was maintained from World War I through trade negotiations with the governments of other countries – for instance with France - as well as with international organisations such as GATT and OECD. Two decrees enabled the US government to support Hollywood exports, the Webb-Pomerene

Export Trade Act and the Franco-American Trade Agreement of 1936, established under the Reciprocal Trade Agreements Program of 1934. Furthermore, the US government managed conflicts over the film industry in international organizations, such as the GATT, the EEC, the OECD, and UNESCO.

The Myth of Subsidies in the Film Industry: A Comparative Analysis of European and US Approaches

Patrick Messerlin, PhD (Sciences Po Paris)

The idea that subsidies help revive film industries has been prevailing. Yet, its effectiveness remains in question. In this regard, this paper addresses this issue by comparing and analyzing the policies in Europe and the United States, as well as their consequences. In general, Europe's subsidy policies were developed to increase the number of film productions. However, this subsidy regime failed to confer noticeable benefits to its film companies and was largely exploited by US companies as a way to avoid protectionist measures in the region. Furthermore, European subsidies *per se* have even functioned as a form of censorship and induced the production of films that are far from the audience's expectations. US subsidy policies, on the other hand, have been implemented by local state governments in order to enjoy the economic and cultural benefits from the filmmaking business. Regardless of these policies, the US film industry works in a market economy within a competition-driven international environment; this is one of the critical factors that has contributed to its global success. This is a point that the European film industry should not overlook. In short, subsidies are only a myth and ineffective for the development of film industries.

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