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THE EFFECT OF SCREEN QUOTAS AND SUBSIDY REGIME ON CULTURAL INDUSTRY: A CASE STUDY OF FRENCH AND KOREAN FILM INDUSTRIES

ABSTRACT

There are voices in France advocating for a Korean-type screen quota system, seen as a key ingredient in Korean films' success, and voices in Korea advocating for a French-type subsidy regime in Korea, perceived as needed in order to achieve further take-off of the Korean movie industry. This paper shows that the Korean screen quota has been irrelevant to the Korean success and that the French skyrocketing and huge subsidies have done nothing for improving the attractiveness of French movies in France. The paper concludes by suggesting that in-depth analysis of the policies pursued by the two countries is a good way to avoid a too costly trial-and-error process when designing policies related to cultural industries and to culture.

Key Words: film industry, film industry policy, cultural industry, screen quotas, subsidy regime, France, Korea

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INTRODUCTION

During the golden era of French films in the early 1900s, France's filmmaking studios dominated the world and their own domestic markets against American without any state support. Yet, French films have steadily lost their market share to American over decades. In order to protect and promote French film industry, the French government has steeply increased the subsidies since 1980s (Dale, 1997). The Korean government has struggled to promote the film industry with various policies since the liberation from Japan; however, most of them did not bring significant changes. Since the late 1990s, Korean films have become internationally competitive and one of leading products of the Korean Wave, which has contributed to a newly hip identity, an emerging "Asia's cultural powerhouse" (Chua and Iwabuchi, 2008). One notable remark which seems to have an effect on boosting the film industry is the intensified screen quota system (Mesmer, 2013).

"The grass looks always greener on the other side of the fence:" this old saying looks tailor-made for the Korean and French film industries. There are, in the French film industry, supporters of a screen quota re-introduction because they see this instrument as decisive in the Korean movies' success. There are also voices in the Korean film sector that a French subsidy scheme is needed in order to achieve further take-off of Korean movie industry. In this context, a comparative study on the policies regarding the two countries is particularly interesting. The policies and history of the French and Korean film sectors have been surprisingly similar until the mid-1990s. Though, the two industries have gone on a very different path since the late 1990s—with a remarkable success in South Korea (hereafter Korea) and a depressing stagnation in France.

This paper provides two key results, based on robust evidence over long periods (decades). On one hand, the screen quota system is irrelevant for explaining the recent success of the Korean film industry. On the other hand, the French subsidy regime has been unable to achieve its primary goal, that is, to increase the "attractiveness" (*rayonnement*) of the French film industry in France *per se*. In short, the grass on the other side of the fence is not as green as it looks. This result has an important corollary. Deep mutual understanding of each other policies is a crucial way to widen perspectives and to reduce costly trials and errors when designing a country's policy without missing important factors. By showing how much the French and Korean policy-makers could learn from each other's past mistakes, this paper hopes to generate more academic interest in knowing better each other's film industry, and beyond that, to have a broader dialogue on all aspects of "culture."

This article consists of three parts. The first is for screen quota of Korea. This section reviews current events in France for supporting screen quota to protect the film industry and conducts an in-depth analysis on Korea's screen quota system. The second part is dedicated to analyzing French subsidies and their impact on French cinema in order to give important implications to the Korean film industry that has increasing voices for subsidies. This paper concludes that pro-competition measures are more important to enhance competitiveness of film industry than protective measures, and it suggests possible further studies.

THE REAL EFFECT OF THE SCREEN QUOTA: LESSONS FROM KOREA

The screen quota has a history in Korea long enough to get a good sense of its true impact on the Korean film industry. The screen quotas were introduced in 1966 in Korea, but their existence were rather nominal. Many argue that the screen quotas were truly implemented from 1993 (Lee and Bae, 2004; Pager, 2011; Parc, 2014a, 2014b). Superficially, it looks like the screen quota system and Korean film success are tightly linked. However, the following in-depth analysis on this issue indeed shows its irrelevance to the success of the Korean film industry, particularly, since the late 1990s. This instrument was also used in France in the 1950s, but it was quickly abandoned by the cinema industry, largely because a much more palatable instrument—subsidies—was granted to the “vested interests.” However, there are voices in the current French film industry asking for a screen quota system (Mesmer, 2013). Korea's experience offers, thus, a key lesson for those supporters.

A demand for screen quota in France

During the two decades preceding the First World War, the French cinema industry enjoyed a very strong position in the world movie markets, as strong as today's Hollywood, with 70 percent of the films exported world-wide coming from Parisian studios (Hayward, 2005). This situation deteriorated quickly and sharply in the 1920s due to the combined outcome of wrong and/or too small investments and distrust in new technologies. Particularly, the emergence of a much larger US film market backed up with economies of scale—hence lower fixed costs, and cultural diversity aggravated hugely the weakening position of the French film industry. This fall led the French government to impose a quantity-based import

quota on foreign films in 1928: a maximum of seven foreign films could be imported for one French film produced.

The early 1930s witnessed a bright spell, but only because of two short-lived circumstances. On the supply side, the rapid emergence of sound movies created a language barrier for the few years before dubbing techniques became industrial routine. On the demand side, the Great Depression forced French theaters to cut seat prices by two-fold. Yet, this pause did not last long, and the late 1930s, additional protection was granted under the form of a quota to restrict the number of foreign films which could be dubbed; 150 foreign movies among roughly 450 films exhibited per year.

In 1946, France needed US aid badly in order to rebuild its economy destroyed by the Second World War. The condition set by the US was the elimination of the import quota on foreign films, and its replacement by a screen quota system—four weeks reserved to French movies out of every quarter—was introduced. Nobody objected strongly then. Yet, in 1948, the vested interests of the French film industry, manipulated by the Communist Party just ejected from the government, engineered well publicized demonstrations that lead to the re-introduction of an import quota on dubbed US films: 120 films per year, and a strengthening of the screen quotas: five weeks were reserved to French movies for every quarter.

However, the film industry quickly lost interest in the screen quotas for three reasons. First, the French film industry was in such a poor state that it could not produce enough movies to meet the theaters' demand if the screen quota regime were strictly enforced. Second, US movies distributed by the French subsidiaries of US studios were considered as French. Last but not least, protection came under the much more palatable form of subsidies: vested interests quickly realized that such an instrument was much easier to manipulate, to expand, and to capture in a discriminatory way (see the subsidy section).

Yet, ghosts of the screen quotas are still haunting the French cinema. First, there still is a screen quota system in the broadcasting sector. Under the pressures of French government, the 1986 "Television without borders," EU Directive (EU law) imposed that 40 percent of movies and TV-series broadcasted by TV-channels should originate locally. This provision is not well enforced in most EU Member States, but it is in France. However, it is becoming almost entirely obsolete due to the Internet technologies of the 2000s which give the freedom to every French to make their own mix of French and non-French movies and TV dramas at home.

Second, in August 2013, one of the main French daily newspapers claimed that as soon as the Korean screen quota cut went on effect in 2006, the domestic films' market share dropped significantly afterwards and concluded—too hastily as shown later—that this decrease was due to the cut of the screen quotas (Mesmer, 2013) echoing an old view in the French cinema industry (Korman, 2007). Third, in September 2014, a report on “Francophonie,” the international organization of French speaking countries, recommended to introduce screen quotas for French-speaking movies in the allegedly 37 French-speaking countries (Attali, 2014).¹

The screen quota in Korea: the Maginot Line²

Korea adopted the screen quota system in 1966. However, some observers argue that it was not seriously implemented before 1993 (Coalition for Diversity in Moving Images, 2000; Lee and Bae, 2004; Pager, 2011). Before 1986, the Korean government relied more on import quotas in order to protect and promote the Korean film industry. The screen quotas became the only protective measure for the Korean film industry when the import quota regime was abolished after the 1986 Korea-US Film Agreement. This agreement allowed Hollywood studios to distribute directly their films in Korea, injecting more competition in the Korean film markets, deteriorating the profits of Korean importers and distributors of foreign films, and depressing—but by not so much—the domestic market share of Korean films (see Figure 1).

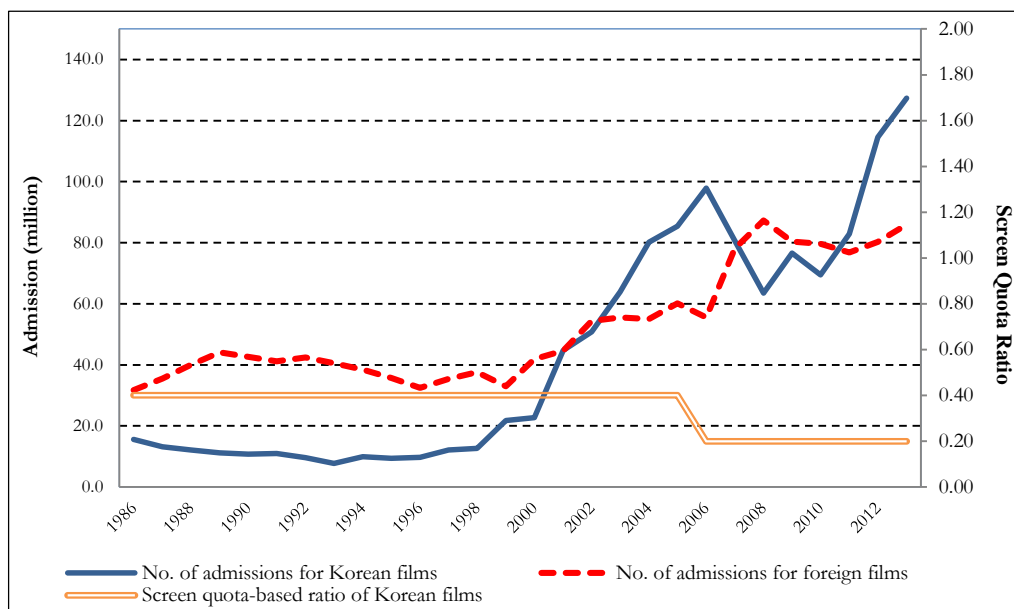
While preparing this agreement, the Korean government set the mandatory number of days for screening Korean films to 146 days.³ Then, when the market share of Korean films reached the very bottom in 1993 (15.9 percent) through the whole Korean film history, the government decided to enforce the screen quota system more strictly. However, the Korean films' market share did not improve very much until the late 1990s. It is only during 1998-2000 that the Korean film industry started to blossom, showing an impressive success in the domestic market since then. Korean films have enjoyed an average market share of 54 percent over the last decade, with record peaks of 60-65 percent.

¹ In Korea, the nationality of films depends generally on that of director. In France, it depends on a complicated set of criteria (nationality of and language used by the producer, studio, director, actors, technical staff, and location). The figure of 37 “francophone” countries is highly debatable (Messerlin, 2014b).

² This section is based on Parc (2014b) which provides all the detailed explanations.

³ The screen quotas set the mandatory screening days for Korean films as 121 days in 1973. During the years 1981-1985, the mandatory days became 165 days per year. However, the admission number of Korean film decreased despite these efforts. For further details see Parc (2014a, 2014b).

Figure 1. The screen quota: irrelevant, 1986 to 2013



Note: based on authors' calculations.

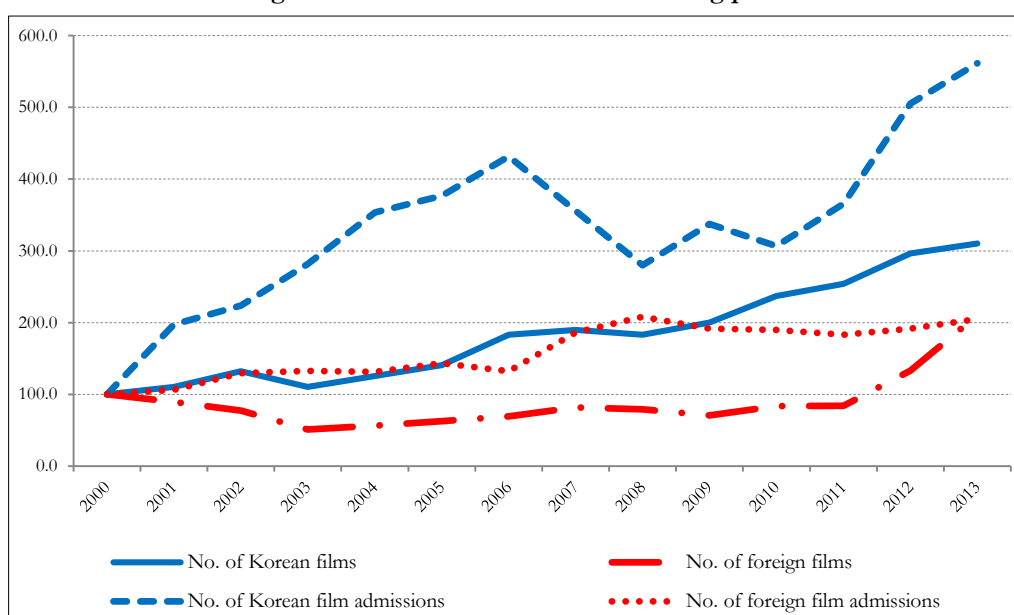
Data sources: Koreanfilm.org, <http://www.koreanfilm.org> (for 1986-2002), Korean Film Commission (various issues) (for 1999-2002), and Korea Film Council (various issues) (for 1998-2013).

In fact, looking at the Korean film industry's trend from 1986 to 2013 does not suggest any noticeable impact of the screen quota implementation on the Korean film industry. First, although the screen quotas were set as 146 days in July 1985, the next decade witnessed very low number of admissions for Korean films (see Figure 1). If the screen quotas had a protective and promoting impact on Korean films, the number of Korean film admissions should have increased under such a quota system. Second, some attributed the surprising increase of Korean film admissions in 1999 and early 2000s to the screen quotas. Actually, during these years, the admissions of foreign films increased also tremendously; in fact, the total Korean film market size increased as a whole (for more details see Parc [2014a, 2014b]). If the screen quotas were the key factor for the Korean films increase, nothing should have happened for the foreign movies.

These facts leave the screen quota cut in 2006—from 146 days to 73 days—as the last possible case of impact to analyze. Figure 2 shows the situation before and after 2006, both in terms of produced film numbers and admission numbers for Korean and foreign films in Korea. The number of admissions for Korean movies declined in 2007-2010 before

catching up strongly after 2010, and this evolution was interpreted as the proof of the impact of the screen quota on the Korean film industry. However, this interpretation is too hasty for two reasons (see Figure 2). First, if perceived as a threat by the Korean film producers, the screen quota cut should have triggered a decrease of the number of released Korean films after 2006. Rather, the number of Korean movies continues on its previous growing trend: in other words, it is “business as usual” from the supply side (Parc, 2014b).

Figure 2. A closer look at the 2006: turning point



Source: Parc (2014b).

Second, if the screen quota cut would have been clearly detrimental to the Korean film industry, the admissions of foreign movies would have increased. However, the foreign film admissions follow an almost modest trend from 2000 till today, despite the amazing increase of the number of foreign movies since 2011. In short, the few years after the screen quota cut did not witness either a decrease of Korean films produced or released or Korean audience rushing to foreign movies. These two observations do not support the argument that the 2006 screen quota cut was a noticeable and decisive cause of the decline in admissions of Korean movies (Parc, 2014b).

Then, how can it be explained that the surprising emergence of Korean films in the very late 1990s, the fluctuations between 2006 and 2010, and the renewed growth since then? Attention should turn to pro-competition changes in the Korean film market after 1986 (Parc, 2014b). The 1990s and early 2000s have witnessed a profound restructuring of the Korean film industry. To overcome the losses caused by the direct distribution of Hollywood companies in the late 1980s, Korean firms had reformed their structures and diversified asset portfolios. They had acquired individual theaters, formed “theater franchises” to have bargain power against Hollywood distributors. In the 1990s, a number of large companies redirected their investment toward domestic film production due to high failure rate on Hollywood film project and, more importantly, transformed the structure of the business, introducing a vertically integrated system—financing, production, exhibition, distribution, and so on (Lee, 2005; Shim, 2006).

Furthermore, Korea’s open-door approach towards Japanese culture, in the late 1990s and early 2000s, enhanced diversity and originality of Korean film industry (Pager, 2011). Above all, Korean firms had massively invested—all that with considerable success until the mid-2000s. However, the screen quota cut in 2006 revealed a uncertain and unpredictable business environment, possibly quality issues of Korean blockbusters caused by less investment of the firms and more sophisticated tastes of the Korean audience required alternative or new business strategies that needed 3-4 years before bearing fruits (Parc, 2014b).

THE REAL EFFECTS OF SUBSIDIES: LESSONS FROM FRANCE

The subsidies to the French cinema have a history long enough—at least 40 years—to get a good sense of its impact on its official goal, the attractiveness of French culture. Although the subsidies were skyrocketing during the 2000s, they could not prevent a stagnant attractiveness of French movies in France. In 2007, a seat tax was introduced in Korea for funding subsidies to be granted to the Korea film industry, and it was supposed to be abolished at the end of 2014, but it has been recently prolonged until 2021—a scenario very similar to what happened in France in 1948. France’s experience offers a strong warning signal to those who would advocate for its further continuation in Korea.

A demand for subsidies in Korea

Initially, subsidies have been seen in Korea as a way to promote film quality and to improve the “cultural” content of the Korean film industry (Kim, 2000). However, recently, support to subsidies has shifted to more economic reasons—namely, the potential of cultural sectors as promising industries. The current subsidy schemes in Korea can be decomposed into three different groups: government subsidies, public subsidies, and tax exemptions.

As documented by Kim (2013), “government” subsidies have increased considerably at the end of 1990s. However, there are two major differences with the French case: first, most of Korean government subsidies have been utilized to enhance infrastructure or distribution channels (Pager, 2011); second, the amount of these Korean subsidies is still extremely low compared to the level in France. It is roughly four percent of the total French subsidies (Messerlin, 2014a; Parc, 2014b).

“Public” subsidies are those funded mostly from the seat tax, three percent per admission ticket. This seat tax was introduced in 2007. Initially, it should have ended by December 2014, but in November 2014, the National Assembly decided to continue it until 2021—a remake of what happened in France in 1954. This seat tax system has many loopholes; For instance, the seat tax is not charged on theaters that show animation, short films, and artistic films, recognized by KOFIC, more than 60% of the 365 days. Its amount is also much lower than the French subsidies: it is roughly eight percent of the total French subsidies.

Currently, Korean tax exemptions are only eligible for small and medium sized enterprises (SMEs). Conditions for eligibility are very strict that only 15.9 percent of SMEs can actually benefit from this scheme (Ministry of Culture, Sports and Tourism, 2010). In short, the current tax deduction regime is incapable to change substantially the global amount of Korean subsidies (Parc, 2014b).

Altogether, Korean film (“government” and “public”) subsidies are estimated to amount to USD106 million (roughly €82 million) in 2011 whereas the French subsidies to the cinema sector alone amounts to €676 million for the same year. Since several Korean organizations and scholars have encouraged to increase the tax exemption regime for film industry (Kim, 2000; Do, Park, and Kim, 2005; Ministry of Culture, Sports and Tourism, 2010), it is particularly interesting to assess the impact—if any—of these massive French subsidies on the attractiveness of the French films in France.

The French cinema subsidies: « A bout de souffle »⁴

The French cinema policy relies on two pillars. First is a tight net of regulations which have established a set of rigidly inter-dependent “feudal monopolies.” For instance, theaters have a transitory collective monopoly since movies can be exhibited only in theaters during the first four months after their release. After this deadline, there are no less than six additional mandatory schedules, depending on the type of media, e.g., DVDs, videos on a film basis, pay channels, videos on a subscription basis, etc., that will be used for showing the movies. Turning to TV-channels, some of them enjoy certain monopoly rights: for instance, Canal+, a French premium cable television channel, can broadcast more foreign films than any other TV-channel. However, these TV-channels “pay” these monopolistic privileges by having the legal obligation of funding films.

The second pillar is subsidies. This oldest pillar dates back from 1948, as said in the previous section. The birth of the French subsidy system has striking similarities with its birth in Korea: subsidies were based on a specially created tax on theaters seats, and the system was initially granted for a limited time (1948-1954). However, over the years, this vested interests have been able to gather increasingly massive subsidies. As a result of this 40 years-long process, in 2011, the French film industry has received a staggering €476 million of public subsidies. Among them, at least €200 million was related to the special unemployment regime for part-time workers in the audiovisual sector (Cour des Comptes, 2012, 2014; Inspections Générales des Finances et de la Culture, 2013).

Another way to express this situation is that the “subsidy rate” (total subsidies divided by the value created by the French film industry) amounts to a staggering 32 percent, at least, of the value added generated by the French cinema sector—roughly 10 times the subsidy rate in Korea.⁵ Such a staggering figure raises a crucial question: has such a huge financial support improved the “attractiveness” of the French films in France, as claimed by the vested interests, or not? During the last couple of years, an increased number of insiders, such as active and well known French film producers, has stated that it is not the case (Maraval, 2011). Answering this question in a rigorous manner requires two sets of data.

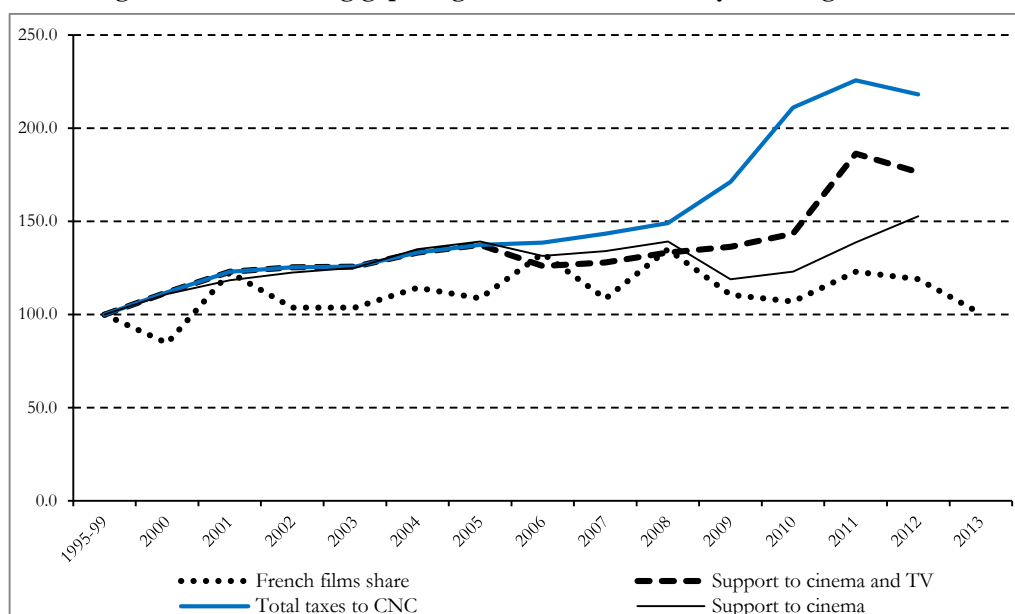
The first is an indicator measuring the “attractiveness” of French movies. The simplest indicator is the admission numbers of French and foreign films (Centre National

⁴ This section is based on Messerlin (2014a) which provides all the detailed explanations. An alternative estimate, which takes into account the complex links between the cinema and TV industries, suggests a subsidy rate of 58 percent.

⁵ It should be stressed that this is a serious underestimate since it relies on very conservative assumptions.

du Cinéma et de l'image animée [CNC], various issues).⁶ Figure 3 shows that the index (100 being the years 1995-1999) of the share of admissions for French movies in France trails close to 100 with four peaks (2001, 2006, 2008, and 2011) reflecting a handful of “hits.”⁷ The second indicator is the evolution of subsidy amount granted to the French film sector. As the subsidies scheme has become extremely complicated and opaque over these four decades (Cour des Comptes, 2012, 2014), three possible alternative estimates of the level of subsidies are provided as follows.

Figure 3. An increasing gap: Stagnant attractiveness, skyrocketing subsidies



Unit: Indexes (1995-1999=100).

Sources: Centre National de la Cinématographie (Various issues), Ministère de la Culture et de la Communication (2013), and Cour des Comptes (2012). Author's computations.

The lowest estimate is the support to cinema, *soutien au cinéma et vidéo* in French, of the “Fonds de soutien” (Ministère de la Culture et de la Communication, 2013), The medium estimate is the support to cinema and TV (the sum of soutien au cinéma et vidéo and *soutien à l'audiovisuel* of the Fonds de Soutien) (Ministère de la Culture et de la Communication,

⁶ In order to eliminate biases which could be generated by picking a good or a bad year as a reference point, the average of the years 1995-1999 has been used in order to get a relatively stable anchor for the calculations.

⁷ These hits are: *Taxi 2*: 10.24 million admissions in 2001, *Astérix et Obélix: Mission Cléopâtre* 14.56 million admissions in 2002, *Les Bronzés 3*: 10.22 million admissions in 2006, *Bienvenue chez les Ch'tis*: 20.36 million admissions in 2009, and *Intouchables* 16.58 million admissions in 2011. Only one of these hits (*Intouchables*) has received wide praises in the rest of the world.

2013), and the highest estimate is the total taxes to CNC, *principales taxes affectées au CNC* (Cour des Comptes, 2012: 25). Using estimates aggregating cinema and TV-channels makes sense in the French context since, as explained above, broadcasting firms are “cash-cows” of the film industry. The crucial point is that, though different, all the estimates, in current euros, of the subsidies provide the same key result: the level of subsidies has skyrocketed during the period by 50 to more than 100 percent; figures in constant euros do not change notably the picture.

Figure 3 gives, thus, a clear answer to the question raised by the insiders: since 2000, there has been an increasingly wide divergence between stagnant French attractiveness and skyrocketing subsidies—whatever their definition is. In short, there is little doubt that the French cinema policy has failed to have a positive impact on the attractiveness of French movies since the dawn of the 21st century. This conclusion is on a collision course with the French official statements that the French cinema policy is successful because it has allowed to increase the number of French movies produced (Cour des Comptes 2014, particularly in Chapter II). In fact, the number of movies produced is not an indicator of success which makes sense or is widely accepted. It is easy to see how weak this indicator can be: it would hold even if all the French movies would attract no audience at all.⁸

This conclusion deserves two final remarks. First, supporters of the French film policy argue that this policy may have had an indirect impact—favoring “cultural diversity,” or in less coded words, reducing the share of the US movies in France.⁹ Evidence shows that it is not the case: the erosion of US movies’ admission share in France since 2000 is observed not only in France, but also in other EU countries during the same period.

Second, supporters of the French film policy also argue that the French cinema policy has allowed the creation of a bigger film industry in France than in other countries of similar size. This assertion is far to be correct. The value of the film activities “made in France” amounts to roughly €2.7 billion. However, a substantial part of these activities is due to foreign operators, notably foreign investors contributing to French film production and foreign films; exhibiting foreign movies in France could hardly be considered as part and parcel of the French film industry. Eliminating these foreign-led activities, the value of

⁸ In fact, it is well known that a notable share of the French movies has never been exhibited in theaters (Cour des Comptes, 2012). This means that the increase in the number of films is to an unknown extent “virtual.”

⁹ The French “benevolence” to cultural diversity does not go very far. Non-US/non-French movies are subjected to the same seat tax without benefiting from French subsidies—as US movies. Their increasing market share means, thus, that they are increasingly contributing to the funding of the subsidies granted to French movies.

the “truly” French cinema industry amounts to roughly €1.7 billion. These two figures should be compared to the size of the Korean film industry which is estimated to be roughly US\$1.4 billion, that is, €1.1 billion (for more details see Parc [2014b]). In short, in 2011, the Korean film industry is already two third of the “truly” French film industry, and is growing since then at a much faster rate.

CONCLUSIONS

Many argue that movies are not like other commodity goods, such as smartphones or Television sets, and advocate that they are parts of culture and art. Thus, they should be treated differently in the world trade regime. In the reality, however, the general criteria for a measure of success in the film industry is market share which is often utilized for a measure of success of other commodity goods. Therefore, the film industry should be analyzed in a wide perspective, rather than merely with an artistic or cultural perspective.¹⁰

This paper focuses on Korea’s screen quota system and France’s subsidies with economic, business, and historical views. Such an approach is very meaningful, since the film sector is becoming a very complex industry which makes hard to conduct an in-depth analysis on film industry solely with one principle. France can learn from Korea and Korea from France. The Korean case tells that a screen quota does not work, and that other factors such as business activities of companies are more critical for a healthy growth of the film industry. Meanwhile, the French case tells that abundant subsidies are not able to contribute to the attractiveness of the national culture they are supposed to promote.

This is because government’s favorite policy does not offer both incentives and stimulation at the same time. Business agents such as firms, including filmmakers, actors and actresses, should contribute to produce quality products, i.e., good movies which should be better than that of competitors. Both incentives and stimulations are crucial. In the Korean case, Korean film producers did not have good incentives to produce good Korean films due to ineffective and superficial government policies which actually distorted the film industry but were abused by agents.

On the contrary, the French case demonstrates that too many incentives without stimulation can harm the industry as well. Agents prefer monopolistic situation to maximize their profits and become indifferent to the development of an industry, ending into a

¹⁰ This is hardly a specificity of the cinema sector. Since at least the 15th century, a host of European famous painters, musicians, and writers—from Rubens to Striggio to Goethe—have become rich and/or held key official positions (such as Ambassadors) in a very pro-competition environment.

complacent attitude. Too much protection—too abundant subsidies—fails to boost up the drive to be more competitive in the world market. Thus, these two cases of Korea and France highly support the importance of pro-competitive measures for enhancing competitiveness of industries.

Yet, the most important message comes from Korea: there is no reason to doubt that an energetic culture can be attractive and flourish in our modern world. Modern—Internet-based—technologies are much better suited to “medium-size” economic and cultural powers, such as Korea and France, than the past technologies—theaters-based, which were much biased in favor of the “large-size” economic powers, such as the US. Indeed, this dialogue between France and Korea should go beyond the specific case of cinema and encompass other aspects of “culture.” It will be all the more beneficial because France and Korea share many “culture-related” similarities in this new brave world—not least that they have the same size in terms of language, a critical ingredient of culture—and the same pride in their culture.

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