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***EU-South Korea:
Current Trends of Cultural Exchange
and Future Perspectives***

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This document has been prepared by Marie Le Sourd assisted by Elena Di Federico (staff at on-the-move.org) and Dr Sung-Won Yoon, Research Professor, Global Research Institute Graduate School of International Studies (GSIS), Korea University on behalf of the European Expert Network on Culture (EENC). Judith Staines, Editor of the website culture360.org and consultant for some South Korean organisations (such as KAMS) was the peer editor of this whole report, together with Jordi Baltà, researcher and programme coordinator at the Interarts Foundation and scientific coordinator of the EENC. The report was carried out between September and November 2012. Some tables in the main report and in the annexes were updated in September 2013, as duly noted throughout the document.

The EENC was set up in 2010 at the initiative of Directorate-General for Education and Culture of the European Commission (DG EAC), with the aim of contributing to the improvement of policy development in Europe. It provides advice and support to DG EAC in the analysis of cultural policies and their implications at national, regional and European levels. The EENC involves 17 independent experts and is coordinated by Interarts and Culture Action Europe. For additional information see www.eenc.eu.

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List of acronyms and abbreviations

3D	Three dimension
ABDI	Asian Development Bank Institute
APRO	Performing Arts Node Korea (internet platform)
ARTRO	Korean Contemporary arts' platform
ARKO	Arts Council Korea
ASEF	Asia-Europe Foundation
ASEM	Asia-Europe Meeting
ASEMUS	Asia-Europe Museum Network
BIEF	Bureau International de l'Édition Française
BIFF	Busan International Film Festival
CCC	Committee on Cultural Cooperation
CCC	Centre Culturel Coréen (appears only once as such)
CHA	Cultural Heritage Administration of Korea
CGV	Multiplex Korea (Cultural, Great and Vital)
CNC	Centre National de la Cinématographie
DI	Digital intermediate
DMB	Digital Multimedia Broadcasting
IPTV	Internet Protocol Television
EAVE	European Audio-visual Entrepreneurs
EFWMF	European Forum of Worldwide Music Festivals
ELIA	European League of Institutes of Arts
EU	European Union
EUNIC	EU National Institutes for Culture
FDI	Foreign Direct Investment
FIFA	International Federation of Football Association
FTA	Free Trade Agreement
GSIS	Global Research Institute Graduate School of International Studies (Korea University)
HDTV	High definition television
HFR	Korean company for mobile Internet
ICBS	International Conference of International Committee of the Blue Shield
ICCN	World Intangible Cultural Festival
ICCROM	International Centre for the Study of the Preservation and Restoration of Cultural Property
ICOM	International Council of Museums
ICOMOS	International Council on Museums and Sites
ICPT	International Coproduction Treaties
IETM	International network for contemporary performing arts
JDIFF	Jameson Dublin International Film Festival
JIFF	Jeonju International Film Festival

JIMFF	Jecheon International Music & Film Festival
K-Arts	Korea National University of Arts
K-Pop	Korean Pop
KAMS	Korea Arts Management Service
KMRB	Korea Media Rating Board
KNCU	Korean National Commission for UNESCO
KOCCA	Korea Creative Content Agency
KOFIC	Korea Film Council
KPA	Korean Publishers' Association
KPD	Korea Publication Distribution Company
KRW	Korean Won
KSIC	Korea Standard Industry Classification
LTI Korea	Literature Translate Institute of Korea
LWDigital	Language World Digital
MCST	Ministry of Culture, Sports and Tourism
MIPTV	World TV Market
MIPCOM	World Audiovisual Contents Market
MIPJUNIOR	International showcase for Children's and youth programme screening
MKE	Ministry of Knowledge Economy
MOFAC	Visual effects Korean company
MOFAT	Ministry of Foreign Affairs and Trade
NMK	National Museum of Korea
NRICH	National Research Institute of Cultural Heritage
OECD	Organisation for Economic and Co-operation Development
OTM	On the Move
PCC	Protocol on Cultural Cooperation
PACE	Performing Arts Central Europe
PAMS	Performing Arts Market Seoul
PiFan	Puchon International Fantastic Film Festival
SBPRA	Strategic Book Publishing and Rights Agency
SEMA	Seoul Museum of Art
SIDance	Seoul International Dance Festival
SIYFF	Seoul International Youth Film Festival
TRIPS	Trade-related aspects of Intellectual Property rights
TVSF	Télévision sans frontières (directive)
UN	United Nations
UNESCO	United Nations Educational, Scientific and Cultural Organisation
UNIDROIT	International Institute for the Unification of Private Law
USA	United States of America
VAT	Value added tax
WFFIS	Women's Film Festival
WOMEX	World Music Expo
WTO	World Trade Organisation

Executive Summary

This report on South Korea-EU Cultural exchange and its economic dimension was written by Marie Le Sourd and Elena Federico (staff at *On the Move*) and a South Korean associate researcher, Dr Sung-Won Yoon, on behalf of the European Expert Network on Culture (EENC). This report follows a request by the Directorate General for Education and Culture of the European Commission (DG EAC) in view of an upcoming meeting of the Committee on Cultural Cooperation (CCC) set up following the conclusion in 2009 of a Protocol on Cultural Cooperation (PCC) as part of the EU-Korea Free Trade Agreement, which is provisionally applied since 2011.

The **introduction** provides details about the methodology, which includes an Internet desk research and interviews with selected experts, and mentions some challenges faced by the research team with regards to time constraints and the limited access to/ availability of some data.

The report is articulated around three main sections. The **first section** provides readers with the overall context of the situation of EU-South Korea cultural exchanges with an emphasis on South Korea's cultural policy features and perceptions about Europe and its culture. The **second section** outlines the situation of EU-South Korea exchanges in four main cultural fields: publishing, performing arts, cultural heritage and the mobility of artists and cultural professionals. Information about the economic impact of these fields is provided where available. The **third section** focuses on the audio-visual sector (including TV, film and animation). After a general introduction of the general characteristics of the audio-visual policies in South Korea, the section explores the areas of cooperation between the EU and South Korea: presence in film festivals, audio-visual imports and exports, situation of co-productions and the opportunities potentially provided by the PCC in particular for the animation sector and the distribution market in third countries such as China. The three sections are thoroughly enriched with information and data in footnotes and annexes and are followed by a conclusions and a set of recommendations.

The **first section on the situation of the EU-South Korea cultural exchange** recalls how the past history of South Korea impacts on its current policies, including in the field of culture. South Korea's current delimitation is linked to the Japanese colonisation (1910-1945) and the Korean War (1950-1953), and the country has always had to struggle to preserve its own territory and culture, positioned between China and Japan. At the internal political level, more than 30 years of oppressive regime hindered South Korea's world recognition. However since 1987 and the election of President Dae-jung Kim, South Korea's rise has been remarkable, and this despite the 1997 Asian economic crisis and the current world crisis. This growth is not just economic, but also cultural, and South Korea counts nowadays with important arts- and culture-related events and is part of numerous international networks and culture events, including in Europe. In this regard, the recent

worldwide success of *Gangnam style* by DJ Psy illustrates, more than a trend, South Korea's increasingly strong cultural branding.

This international opening of South Korea was the start of the signature of **numerous culture-related bilateral agreements with EU countries** (a total of 16, mostly signed after the democratisation of the South-Korean regime). Europe is represented through four national cultural institutes in Seoul and five embassies with a cultural component, whereas South Korea has 6 of its 23 Korean Cultural Centres located in EU. Even if cultural exchange goes of course beyond these official centres, the **EU countries that are more represented in terms of culture-related projects are those having an official representation in South Korea**, such as the United Kingdom, France, Germany, Italy, Spain, the Netherlands, Czech Republic and Hungary.

No specific surveys or analysis on how South Koreans perceive European culture or cultures in Europe have been found. However the researches made by Dr Sung-Won Yoon highlight the fact that in general **South Koreans perceive the "EU" differently than "Europe", associating the former with trade and the latter with travelling and culture**. The United Kingdom, Germany and France would come as the "big 3" countries better known by South Koreans, who do not think of Europe as a cultural entity.

The section ends with an introduction to South Korea's cultural policies and trends on an international level. The development of cultural policies is linked to the opening of the regime at the end of the 1980s. However the 1997 Asian economic crisis had a considerable impact on South Korean cultural policy, establishing a **more commercial priority**: the focus moved to cultural and creative industries, the financial returns they offer, and the social impact of culture. South Korea's cultural policy is characterised by:

- 1) The **balance between commercial and public interests**: there is a strong political willingness to support the *hallyu* or South Korean wave (South Korean pop music and TV series in particular) as it can contribute to job creation and has a higher potential in exports. For export the emphasis is particularly placed on **East-Asia and in particular towards China and Japan**.
- 2) The **investment in the cultural welfare of citizens**: culture is understood in its social component and contribution to people's life. The Ministry of Culture, Sports and Tourism supports for instance cultural vouchers for under-privileged groups including children.
- 3) The **acknowledgement of multiculturalism**: the ratification of the UNESCO *Convention on the Diversity of Cultural Expressions* (2005) is an important step in a country which places great emphasis on **the promotion and preservation of Korean culture**.

These features of South Korea's cultural policy are also complemented by the attention paid to other issues, such as an involvement in projects related to culture and environment, and on alternative sources of funding for the arts and culture.

The **second section** of the report focuses on **four cultural industries or culture-related fields** in South Korea and reviews the potential for international investment and exchange:

- **Publishing sector:** Data for this section were particularly found with the Korean Publishers' Association (KPA) and the *Bureau International de l'Édition Française*. The estimated number of South Korean publishing houses is about 35,000, with only 150 publishing houses having published more than 50 books per year. The KPA estimates that the South Korean publishing market is worth around US\$ 4 billion (2009). **Children books** enjoy the largest share of the market at 16.4%. **Education books** come in third position after literature but this sector is very profitable since the average production run is 9,000 against an average print run of 2,600 for all categories combined. **China and Asia are the biggest foreign markets for South Korean books, still with a focus on children books:** over the last two years, China has accounted for 41% of the trade, followed by Thailand, Indonesia and Taiwan. This trend is reinforced by the *Hallyu*, Korean wave. South Korea is since the mid 2000s well represented at important European books fairs (such as Frankfurt, London or Bologna) and hosts the Seoul International Book Fair, attended among others by European representatives of international publishing houses.

The **e-book market is increasingly growing** thanks to support measures enacted since 2010 by the Korea Electronic Publishing Association and by the MCST. This may explain why Google has chosen South Korea as the first Asian country to launch its e-book business, as well as the agreement for over 700 e-book titles signed in May 2012 at the London Book Fair between the Strategic Book Publishing and Rights Agency (SBPRA) and Language World Digital (LWDigital), a South Korean-based distributor.

In terms of **translations, on average 80% of the translations come from Japan, the USA and the United Kingdom**. French, German and Italian books are also being translated but to a much lesser extent. The Literature Translate Institute of Korea – a public organisation - is particularly active in the field of translation (covering 30 languages including 14 European ones), as well as the private Daesan Foundation.

- **Performing arts sector:** the presentation of this sector shows a South Korean marketing approach to the support of performing arts and the challenges that co-productions or collaborative projects face as far as the EU-South Korea exchange is concerned. Most of the data to describe the performing arts sector were retrieved thanks to publications by the Korea Arts Management Service (KAMS), whose objective since 2006 is to make the **South Korean performing arts market more competitive** through research, support grants for the participation in key international performing arts events or collaboration projects.

In term of size of the performing arts market, there are 3,034 businesses that are run privately or through public funding. For the latter, in 2010, the Central government allocated

11.2% of the total arts and culture budget to the performing arts sectors, while local government authorities allocated 30.6% of their arts and culture budgets. **Western music companies and theatre/musical companies** are the top ranked in terms of business companies and total sales. Venues show attention to the market and profitability and design their programmes to fit the audience's demands.

In **term of out-bound programme**, mostly supported by the Korea Foundation, KAMS and the Arts Council Korea (ARKO), traditional art forms and music come first. **Europe** hosted in 2010 most of the activities of South Korean artists performing internationally (37.8% including 4.91% for Russia), followed by Asia (32.9%), North America (19.2%), South America (5.7%), Africa (3.1%), and Oceania (1.4%). **Germany, Spain, Russia and France** are among the most visited countries. This high representation of Europe is also visible for the incoming programme (mostly music – classical). Other fields are also covered in terms of exchange (even if at a lesser extent) such as dance, theatre and street arts.

Seoul has been hosting since 2004 **the Performing Arts Market Seoul (PAMS)** which has become a reference event and meeting place in Asia and worldwide. Within 8 years only, Europe has been twice the Region of Honour, in 2007 (in conjunction with an International Contemporary Performing Arts Network-IETM meeting) and in 2012 with a special focus on Eastern European countries (Visegrad and Balkan regions).

If some projects - as the KAMS Connection projects – show a tendency to move from a marketing approach towards exchange and collaboration with EU countries, it is often **difficult to think of such collaborations in the long term** because of cultural differences and due to the fact that South Korea's investment in cultural infrastructures has developed much faster than the adequate human resources; on the other hand there is a lack of support by European regional organisations which do not see yet the potential to develop partnerships with South Korea.

- **Cultural Heritage:** this sector is key for South Korea as the country has often struggled in the past to keep its culture and traditions alive despite the occupation of its territory. One of the key organisations to administer the rich South Korean cultural heritage (3,645 state designed cultural heritage items) is the **Cultural Heritage Administration of Korea (CHA)** whose budget has increased by 35% from 2006 to 2012 to reach the amount of KRW 614.8 billion in 2012.

Key topics for South Korea's cultural heritage policy are: Intangible cultural heritage; Cultural heritage property return; Museum education and use of new technologies and Protection of cultural heritage (also in relation to climate change).

There are **344 public museums** in South Korea, including 29 funded and operated by central government. The most important museums are the National Museum of Korea, the National Folk Museum of Korea and the National Contemporary Museum of Art. In addition

to the national and public museums, there are **91 museums funded and operated by colleges and universities and more than 336 private museums** established by private citizens, religious organisations and business enterprises.

Internationally, South Korea has been very active and successful in **submitting World Heritage, Intangible Cultural Heritage of Humanity and Memory of the World candidates from Korea to UNESCO for registration on the relevant UNESCO lists**. One of the key events for South Korea's positioning on the international scene was the first ICOM General Assembly held in Seoul in October 2004.

Only three agreements with European partners in these fields (museums, universities, research centres) have been signed with the United Kingdom, Hungary and France. A framework agreement in cultural affairs exists since 1965 with Italy as well. Considering Asia as a whole, South Korea is very active in Asia-Europe connections, and has taken up the presidency of the Asia-Europe Museum Network (ASEMUS).

- **Mobility of artists and cultural professionals**: as it is very challenging to provide data about cultural mobility between the EU and one third country, this section highlights South Korean funding organisations for mobility as well as some areas that could be worth examining for a potential future in-depth evaluation of the mobility of artists and cultural professionals between South Korea and the EU.

According to the information gathered through a recent mapping of mobility funding opportunities for Asian artists and cultural professionals, **South Korea** is after Australia and Japan one of the key countries to provide funds not only for **outgoing mobility** (mostly as part of a marketing strategy, as through the grants offered by the Korea Foundation, ARKO or KAMS) but also for incoming mobility, particularly in the fields of training and cultural exchange programme (with a focus on Asia).

Other sectors that are deemed to be necessary to cover for a complete study of mobility flows are **visual arts, design, new and mixed media, crafts also in relation with the economic dimension of cultural industries**. The several research institutes and organisations existing in South Korea - a rather unique case in Asia - could facilitate an in-depth analysis of the cultural mobility flows and active in the collection of such data. Finally such a survey could encompass data related to more independent or alternative forms of art, the social conditions of mobile artists and the role of the South Korean students currently studying arts and culture-related issues in Europe.

For the **four sectors covered**, one of the key characteristics of the South Korean government is its **“regular signing activity”** of international or regional agreements, partnerships and memberships since about a decade ago. All sectors are concerned but the cultural heritage field is particularly significant: 8 out of the 11 South Korean sites included in

the UNESCO international list of Intangible Cultural Heritage of Humanity were added since 2009.

Another trend, partly due to the willingness to decentralise the country (about half of the 49 million South Koreans live in Seoul and its suburb) is the “**city cultural branding**”: **Paju** is the book city, **Gwangju** is the Asian cultural hub for the performing arts, three cities are listed under the UNESCO creative cities’ network (**Seoul, Icheon** and **Jeju**), and finally **Busan** will soon be the core city for the cinema industry.

The **third section** of the report focuses on the **audio-visual sector in South Korea**, its current patterns in relation with exports and imports, co-production with EU countries and the potential for development in particular in view of the implementation of the PCC.

The audio-visual sector has particularly benefited from the turning point in 1997 and the commercial shift of the cultural industries. According to the World Trade Organisation (WTO) 2010 statistics, South Korea ranked eighth in the world in terms of the number of motion pictures produced in 2008. The South Korean government has been reinforcing its strategic support to **creative industries** in order to **improve the competitiveness of the South Korean content industry** and to make it one of the world’s top five content powerhouses, in particular by creating new markets and developing diverse contents using South Korea’s unique cultural resources that benefit the new environment of media convergence.

The audio-visual sector is organised around some key organisations. The film industry has the support of the **Korea Film Council** which together with the Korea Media Rating Board (KMRB) will move to Busan in 2013 (the city already hosts the most important film festival in South Korea and Asia). The Korean Broadcasting Committee - now part of the **Korea Communications Commission** - was established to oversee all broadcasting in the country. A more recent but pivotal structure is the **Korea Creative Content Agency (KOCCA)** established to provide efficient support for the growth of cultural industries.

The **film sector** is **relatively strong**, and often compared with the French one in terms of support bodies and schemes or level of public attendance for local productions. The system of film production is vertically integrated from production to distribution and is well supported by organisations such as KOFIC through its film development fund. The cinema audience has increased dramatically thanks to the important investment in multiplexes in recent years: **the number of screens** has been multiplied by 2.5 within one decade and reached in 2010 a total of **2,003** (non-multiplex cinema represents only 7% of the total seats). Creativity was enhanced at the end of the 1980s due to the elimination of government censorship and the entry of major conglomerates (*chaebol*) into the film industry in the 1990s, but another element was **crucial to boost the film industry: the prizes awarded at prestigious European film festivals in Venice, Berlin and Cannes**. One of the first to pave the way to this international recognition was the award as best film director to Kwon-taek Im’s for his

film *Chihwaseon at the Cannes Film Festival* in 2002. However such “arthouse” films register a low success in South Korean box offices, despite the aura gained on the international level.

Apart from these prestigious film festivals, South Korean films are often part of Asian film festivals in Europe (like Deauville, Udine etc.) or international festivals with film markets or workshops for professionals such as the Rotterdam International Film Festival. South Korean films are also often presented as part of animation film festivals in London, Norwich, Prague or Annecy. Finally in terms of market place in Europe, South Koreans regularly attend the MIPTV and MIPCOM&MIPJUNIOR in Cannes.

European film professionals and films regularly take part in important film festivals in South Korea, like the Busan International Film Festival, the Puchon International Fantastic Festival or the Seoul International Cartoon and Animation Festival.

Despite this overall good situation, and the fact that in South Korea the market share per admissions for South Korean films is very good in 2012 (53.90% against 40.30% for Hollywood films and 3.7% for European films), there is a relative crisis of the system because of a **saturation of the national market and a relative decrease of film exports** (in particular to Japan). This situation explains why the sector recommends more incentives for foreign film producers working with South Korea, which would allow South Korean films to gain a foothold in foreign markets.

As regards **foreign investment** in the broadcasting and culture field, **Asia plays a prominent role**, followed by the USA and Europe. There is a hint that this low level of investment into South Korean broadcasting may be due to the South Korean government's rules related to broadcasting quotas, regulations on ownership, nationality requirements, which do not nurture a favourable context for investment. More open regulations would allow the market not to be focused only or primarily on Asia and on Korean TV series (dramas). In terms of **exports of films**, **Asia still comes first as a destination, with 56.94% of the total exports**. Europe comes second before the USA but has lost some share with 22.23% of the total export in 2011 compared with 33.26% in 2010.

The **animation films** export shows positive figures, all the more since the sector started to organise itself to help the development of co-production projects. This is in particular the case with the European Film Animation Association - Cartoon which organised for the third time in March 2012 in Busan, with the Korean company Kotra, the event “Cartoon Connection Korea”, with more than 100 European, Korean and Asian companies. 11 co-production projects are being negotiated at present, and South Korean producers are interested in the possibilities opened by the PCC for a more important distribution in the European market.

For the **export of TV series, Asia ranks first** much ahead of USA and Europe even if recently, benefiting of the internationalisation of the South Korean wave, *hallyu*, the rights of South Korean TV series have been acquired by European TV networks or channels (France, Hungary, Romania, Bulgaria, Belgium and Spain). In this regard, there is a strong incentive from KOCCA to export formats more than contents in particular as far as TV series are concerned (the storylines fitting better for Asian than for European audiences).

Film co-productions with EU member countries are still very limited: out of 60 total co-productions, only a few involve EU-based partners, of which one with the Netherlands in 2006 and four since 2006 with France (two as part of the France-South Korea film co-production agreement and two outside of it).

The co-production agreement with France is analysed in the report as a relevant example. Four films are into negotiation as part of the agreement and after a workshop of presentations facilitated in November 2011 by Centre National de la Cinématographie (CNC) and KOFIC. Three others are being developed beyond the co-production agreement. The **advantages** deriving from the agreement concern **the tax incentives, the funding mechanisms and the opportunities offered for distribution in Europe and third countries** like China. One of the **challenges** faced by the French side is the question of the **artistic** quality and contents of the films: contents can be understood differently by the two parties, and South Koreans consider it mainly as part of a “cultural branding” and **commercial** strategy, for instance in line with the success of the *hallyu* wave. A challenge for co-productions is thus to find a common understanding on the contents - and the challenge is relevant, if for instance South Korean films awarded in international film festivals are very rarely a success at the South Korean box offices.

Workshops, meetings and professional encounters can help to find a common line of understanding; good examples are those organised by KOFIC and CNC. One key point also to help for the distribution of films is the **constant nourishing of the audience with films coming from Europe**. French films for example are well received because there have been over the years numerous films screened in South Korea during French, European or South Korean film-related events.

Finally film co-production agreements can have a positive impact on distribution also by facilitating the **opportunity to work with a third party**. For example South Korean film professionals have developed strong links during the past years with their Chinese colleagues, in particular thanks to their expertise in the digital cinematography processing and distribution, and this opens up opportunities for European producers engaging with South Koreans.

The **conclusion** of the report recalls the main ideas of each section with an emphasis on South Korean cultural policy's main points: **marketing and commercial approach** of cultural and creative industries, **preservation of the national cultural heritage and traditions**, **focus on the Asian region** (through a triangular relation with Japan and China), investment in **international and multi-lateral agreements**, **national cultural branding** and focus on **youth and education**. For all the sectors covered but the performing arts, Europe appears not to be a priority for exports or imports despite some important niche areas to exploit.

The report ends with a set of **7 recommendations**:

- **Policy-level strategic meetings**, to share experiences related to the contribution of culture and creative industries to economic growth and to gain from the South Korean experience in this respect;
- **People-to-people professional encounters**, building on, and further developing, existing initiatives, to respond to the crucial need to set up long-term and focused platforms of exchange in all cultural and audio-visual sectors;
- **Focus on diversity** - geographical diversity, with more European countries involved in exchanges with South Korea, and artistic diversity, exploiting the potential of exchange in the contemporary performing and visual arts fields (including the more alternative and experimental ones);
- **Focus on youth and education** as a transversal topic, cutting across all the previous ones, and paying particular attention to the growing number of South Koreans undertaking arts and culture studies in Europe;
- **Audio-visual sector**: the animation sector shall be encouraged in its endeavours. A partnership with the European Animation Film Association could support the development of on-going projects. Existing good practices like the experience of the French-South Korean film co-production agreement shall be taken into account, and encounters between South Korean and European film professionals organised on a regular basis (also with invitation to third parties, e.g. Chinese representatives). For TV series, emphasis could be put on the export of formats rather than contents.
- **Cities and regions' cultural branding**: meetings at the city level shall be encouraged based on the South Korean experience and the European Capitals of Culture.
- **Cultural mobility statistics**: considering South Korea's great number of research institutes in the field of arts and culture, a survey on mobility flows between South Korea and EU could be encouraged as the first initiative of this kind between EU and a third country.

Introduction

Background of this report

On 3 September 2012, the Directorate General for Education and Culture of the European Commission (DG EAC) submitted a request for an expert contribution on behalf of the European Expert Network on Culture (EENC) mapping the current cultural exchange between the European Union (EU) and the Republic of Korea (referred by the researchers in this report as “South Korea”) and their economic dimension. The request arose in the context of the forthcoming first meeting of the Committee on Cultural Cooperation (CCC) set up following the conclusion in 2009 of a Protocol on Cultural Cooperation (PCC) as part of the EU-Korea Free Trade Agreement, which is provisionally applied since 2011. The CCC’s first meeting is due to take place by the end of 2012.

In this context, the EENC - via the team introduced below - produced this present report mapping the current reality of cultural exchange between the EU and South Korea in several specific fields, including publishing, performing arts, cultural heritage, the mobility of artists and culture professionals, cultural industries and audio-visual (with a particular focus on co-production), as well as the policies and cooperation frameworks existing in these fields.

Methodology

The information contained in this report was retrieved mainly through:

- An **Internet-based** desk research. Attention was paid to gather knowledge, data and information about South Korea from several international resources – a task made easier by the availability of much good-quality and relatively updated information in English for most sectors. Four sources were particularly used at the beginning of the research: the Korean section of the cultural website culture360.org by the Asia-Europe Foundation (ASEF)¹, the websites linked to the Korea Arts Management Service (KAMS)², the Korean Film Council’s website³ and the *Guide to funding opportunities for international cultural exchange in Asia* by Korea Arts Management Service and ASEF⁴.
- **Interviews with selected South Korean and European cultural professionals/artists and officials**⁵. Where possible, these allowed the researchers to get more detail on particular cultural issues and/or provided some inputs and expectations related to the PCC.

¹ <http://culture360.org/country/korea/>

² <http://gokams.or.kr>

³ <http://www.koreanfilm.or.kr>

⁴ <http://culture360.org/asef-news/funding-opportunities-for-international-cultural-exchange-in-asia/>

⁵ Annex 1: List of interviews (emails or direct meetings)

- **Participation in the 1st World Biennale Forum in Gwangju on 28-30 October 2012:** Marie Le Sourd, part of the research team, was invited to participate just before this report was commissioned. Attending such an event allowed a better understanding of the context for South Korean cultural professionals.

Most of the report was written by Marie Le Sourd and Elena Di Federico, staff of the cultural mobility information network *On the Move*⁶, except for the chapter about the audio-visual sector, where most of the data were collected by a South Korean associate researcher, Dr Sung-Won Yoon⁷, who had access to the most updated information. She also contributed with her expertise to the section on the perception of Europe and European culture by South Koreans. Finally Judith Staines, Editor of the website culture360.org and consultant for some South Korean organisations (such as KAMS) was the peer editor of this whole report, together with Jordi Baltà, researcher and programme coordinator at the Interarts Foundation and scientific coordinator of the EENC.

Challenges

The timeframe of the research was extremely challenging, both in terms of limited time available for the report and the overlap with related international events. Most of the information had to be collected in a relatively tight timeframe (mid-September to early November 2012), thus limiting the quantity of data retrieved.⁸ This also had an impact on securing the collaboration of a South Korean researcher (only confirmed at the end of September). In addition, important international cultural events take place in September and October in South Korea (Busan International Film Festival, Performing Arts Market in Seoul, SIDance Festival, Gwangju Biennale etc.) and this hindered the access to direct sources of information (in particular through interviews). However efforts were made to collect a wide range of data and the most updated available, especially as far as statistics are concerned and in particular for the audio-visual sector.

Although a large amount of information and data can be found online in English, data for independent cultural and audio-visual production were more difficult to identify and not complete enough to allow an in-depth analysis.

Some quantitative data listed in the initial request from DG EAC are currently unavailable, namely those related to the mobility of artists and cultural professionals between South Korea and the EU - such data are currently not available for the EU either. This report however does contain partial information about the international circulation of artists, as well as other cultural fields that the authors deem necessary to take into account for an understanding of the overall mobility flow and enhanced cultural cooperation between South Korea and the European Union.

⁶ <http://on-the-move.org>

⁷ Following her advice, Korean names follow the western order with the family name in second position.

⁸ Some tables have been updated in September 2013.

Presentation of the outcomes of this report

Following the request by the DG EAC, the study presents:

- An overview of the major trends concerning the current situation of South Korea-EU cultural exchange, including a general introduction to the cultural policies and sector in South Korea and some information about South Koreans' perceptions about Europe;
- A presentation of key cultural sectors in South Korea with, where possible, quantitative data, including for the economic dimension of individual sectors and for international investment and exchange;
- A focus on the audio-visual sector addressing both the domestic reality of the audio-visual sector (TV and film) in South Korea and international co-production in this field (including animation film);
- Conclusions and key recommendations based on the analysis of the abovementioned sectors, highlighting niche areas of cooperation with a high potential to strengthen the implementation of the Protocol on Cultural Cooperation.

In order to facilitate the reading of the document and further documentation on the approached topics, section 3 includes an introductory table of key organisations and weblinks, enriched by information included in the annexes⁹.

Final notes from the authors of this study: considering the tight timeframe to complete this report, but also the important contacts developed with the South Korean cultural sector, the researchers are available to answer any queries or request of clarification at mobility@on-the-move.org.

⁹ In particular the Annex 2 includes a selected list of culture- and art-related organisations in South Korea.

1. Situation of EU-South Korea Cultural Exchange

This section includes a brief introduction to South Korea, a general depiction of trends, major initiatives, privileged partners in the EU as well as broader contextual information on the cultural reality in South Korea, its cultural cooperation priorities and the general perception of European culture – or at least Europe – in that country.

1.1. South Korea: a brief introduction¹⁰

Since the democratisation process which started in 1987, the rise of South Korea has been remarkable, in spite of the financial crisis of 1997: today it counts among the top 15 world economies and is the 4th largest economy in Asia. South Korea has also started to assert itself on the international arts and cultural scene through recent flagship events in South Korea and an active participation in key international arts and cultural networks, organisations and projects, including in Europe. The recent worldwide Internet success of *Gangnam Style* by South-Korean rapper DJ Psy, culminating in its recognition by United Nations (UN) Secretary General Ki-moon Ban as “a force for world peace”¹¹, is far from anecdotal and illustrates South Korea’s increasingly strong cultural branding.

The history of Korea has for centuries been a struggle to preserve its own territory and culture, positioned between China and Japan. The current division of Korea is linked to the Japanese occupation that lasted from 1910 until the end of the Second World War. The South part of the peninsula then under the American influence and the North under the Soviet domination entered a three-year war that came to a *status quo* with the armistice of Panmunjeon in 1953 and resulted in the division of Korea around the 38th parallel. South Korea was subsequently under the authoritarian and dictatorial controls of Syngnam Rhee and Chung-hee Park before its first presidential election in 1987. Dae-jung Kim was the first legitimately elected South Korean president. Dae-jung Kim’s image remains very strong among South Koreans, and despite the fact that the whole country is still divided, he also remains renowned on the international political scene for having started a dialogue process with North Korea in June 2000 with the first meeting with the North Korean Dictator Jong-il Kim.

South Korea is composed of one Metropolitan Government (Seoul), six Metropolitan Cities (Busan, Gwangju, Daejeon, Daeju, Incheon, Ulsan), eight Provinces (Gyeonggi, Gangwon, South/North Choongcheong, South/North Gyeongsang, South/North Jeolla), one Special Self-governing City (Sejong) and one Special Self-governing Province (Jeju)¹². Out of the 49-million population that South Korea counts, 22 millions live in Seoul and its surroundings.

¹⁰ This general brief introduction will be enriched throughout this report with the contextualisation of each main section. Two maps of South Korea are included in Annex 3.

¹¹ <http://www.bbc.co.uk/news/world-20053091>

¹² See Annex 4 for a general map of Seoul and its suburb (with satellite cities).

The urbanisation process of South Korea has been extremely fast: in 1961, 28% of the population lived in cities against 83% today. This urbanisation is very geographically localised in the North-West and South-East of the country.

South Korea is also one of the most homogeneous countries in the world - ethnically and linguistically speaking - with only a small Chinese community and in spite of recent higher migration of foreign workers (from South Asia and South East Asia). Partly due to the abovementioned political turmoil, the Korean diaspora is, however, quite significant across the world. Estimated at 7 million people, Koreans are found particularly in Japan, the United States of America (USA) and China, with increasing numbers in Canada and Australia. Finally the birth rate is one of the lowest in the world (1.3), a fact that will impact on the population renewal and dynamism in the 21st century.

Despite the current economic downturn due to the world economic crisis¹³, South Korea is still among the ten largest export countries in the world through investing in innovative technology industries (displays and memory semiconductors, ship building, mobile phones, automobiles, steel etc.).

Beyond the fact that among the general public, some people may still misunderstand or confuse the political realities of North and South Korea, a number of significant events have brought positive international attention to South Korea in recent years:

- 1988: Summer Olympic Games in Seoul¹⁴
- 2002: FIFA World Cup (international football event co-hosted by Japan)
- 2007: Nomination of Ki-moon Ban as the Secretary General of the United Nations (First Asian representative for this high level posting)

Finally the “hallyu” or the Korean wave¹⁵ which, after first being an Asian phenomenon, has more recently touched some European capitals such as Paris and London through the success of Korean pop concerts (*K-Pop*) attracting thousands of European teenagers.

¹³ The news reported on 29 October 2012 a 1.6% growth for the year to come.

¹⁴ South Korea will host the 2018 Winter Olympics.

¹⁵ The history of *Hallyu* can be divided in three periods and genres: The first one is from the end of the 1990s till the beginning of 2000 when the first *dramas (TV series)* were mostly distributed in China, Taiwan and Vietnam (with mostly a female audience between 40 and 50 years old). The second phase, between 2000 and 2005, corresponds to the top success of these dramas while reaching Japan and South East-Asia. The last phase attracts more the younger generation, beyond Asia, in particular through the K-pop, i.e. **South Korean pop music**. This Korean wave also encompasses fashion and food and has an impact on cultural tourism in South Korea with Asian tours visiting the sets of Korean TV dramas. <http://temi.repubblica.it/limes-heartland/the-korean-wave/1779>

1.2. South Korea and the EU, the official cultural presence

South Korea has signed bilateral cultural agreements with 16 EU countries¹⁶, namely Bulgaria, Czech Republic, Estonia, Finland, France, Germany, Greece, Hungary, Italy, Poland, Portugal, Romania, Slovakia, Slovenia, Spain and United Kingdom. Except for France (1965), Germany and Greece (1970) and United Kingdom (1982 and 1983), all the bilateral agreements date from the 1990s. All include cultural activities, and in some cases also education, social issues and tourism. France is the only EU country to have signed a specific film co-production agreement with South Korea, in 2006.

European culture is represented in South Korea¹⁷ by four national cultural institutes - the British Council, the Institut Français, the Goethe Institut and the Italian Cultural Institute - as well as by embassies with a cultural section or influence (Czech Republic, Greece, the Netherlands, Sweden and Ireland). The British Council is the coordinator of the EU National Institutes for Culture (EUNIC) cluster in South Korea. To date one event is mentioned on EUNIC's website, "One week to meet them all", to meet Europe in Seoul in May 2010. According to Dr Volker Reimar, Director of Programmes for the East-Asian region at the Goethe Institut¹⁸, there are interesting cultural dynamics supported by some national cultural institutes and embassies in terms of cultural exchange such as the Goethe Institut, Institut Français and the Czech Republic embassy. For the latter, the "Czech Points in Seoul" festival was held in October 2011 not only with the promotion of Czech arts and culture but also the organisation of a seminar on green technologies. This "Czech Points in Seoul" Festival was introduced as an important element of soft power diplomacy¹⁹. Other events related to the celebration of diplomatic ties between EU countries and South Korea can be also highlighted such as in 2010, the exhibition "The shadow of speech" from the collection of the Barcelona Museum of Contemporary Art at the National Museum of Contemporary Art in Seoul to celebrate the 60th anniversary of the Spain-Korea diplomatic relations²⁰.

In terms of South Korean cultural presence in EU countries²¹, **there are 23 Korean cultural centres in the world including 6 in EU countries**: France (Paris), United Kingdom (London), Germany (Berlin), Spain (Madrid), Poland (Warsaw) and Hungary (Budapest). The budgets of these Centres come from the Korean Ministry of Culture, Sports and Tourism (MSCT) but their directors are appointed by the Korean Ministry of Foreign Affairs and Trade (MOFAT), for which "*culture has risen as an indispensable element of a nation's competitiveness and economic resource that produces added value*"²². Their missions are to

¹⁶ Mapping Asia-Europe Cultural Cooperation (Judith Staines, July 2010), <http://on-the-move.org/news/article/15021/mapping-asia-europe-cultural-cooperation/>

¹⁷ <http://www.eunic-online.eu/korea>

¹⁸ Meeting at the Gwangju World Biennale Forum on 29 October 2012

¹⁹ http://www.mzv.cz/seoul/en/news_and_activities/seoul_czech_culture_festival_to_be_held.html

²⁰ <http://www.macba.cat/en/the-shadow-of-speech-macba-collection>

²¹ Overseas Korean cultural centres:

http://www.mcst.go.kr/usr/culture/index_en.jsp and Overseas cultural attachés:

<http://www.korea.net/AboutUs/Overseas-Korea-Centers/Culture-and-Information-Officers>

²² http://www.mofat.go.kr/ENG/policy/culture/overview/index.jsp?menu=m_20_150_10

make Korean language better known and to disseminate Korean culture. The most ancient and still most important of these centres is the *Centre Culturel Coréen* located in Paris (created in 1980 with a current budget of €1.61 million) and the most recent is the Korean Cultural Centre of Budapest, officially opened in February 2012. There are also three cultural attachés in Brussels, Rome and Stockholm. Two Korean Cultural Centres are located in Turkey and Russia (the latter country often considered by South Korean organisations as part of Europe, for instance for cultural statistics).

According to Mr Jong-Soo Lee, Director of the *Centre Culturel Coréen* in Paris, the number of Korean cultural centres is increasing without any corresponding increase in the overall budget, resulting in reduced budgets for existing centres (new centres are planned in Brussels and Rome, as far as the EU is concerned). The South Korean government expects to have 36 cultural centres worldwide by the end of 2014. Plans are also in place for a massive increase in the number of Korean language centres worldwide, called *King Sejong Institutes*, from the current 60 to some 200 by 2016. In spite of the reductions in the centres' budgets, the cultural and linguistic offers seem to remain highly subsidised, as shown by the low subscription costs. In the Paris Centre, the inscription for a semester to learn Korean language is only 30€ and the number of subscriptions is significant this year – possibly an effect of the Korean wave.

In general there is no real coordination between Korean cultural centres in Europe, except for some tours of South Korean artists/performing art companies that require maximising the sponsors' investment. The Centres run their own events such as exhibitions, concerts, Korean film festivals etc. Special events can be held at particular occasions, such as during the Olympic Games in London when the Korean Cultural Centre organised the 100 days' events "All eyes on Korea"²³.

Finally it is worth to notice that relevant collaborations have been carried out by some EU countries with North Korea, like a classical music concert in Paris in March 2012 with musicians from North Korea directed by a South Korean director²⁴ or the project of a German classical music concert in North Korea (project still in process according to the Goethe Institut's information).

1.3. Cultural exchange beyond the official channels

Cultural cooperation between EU countries and South Korea goes beyond these official national cultural institutes. Interestingly, however, the EU countries that are most involved in exchange and cooperation with South Korea in the audio-visual, performing arts, publishing and cultural heritage fields are France, Germany, United Kingdom, Italy and Spain – i.e.

²³

<http://www.kccuk.org.uk/navigator.do?menuCode=200903170055&action=VIEW&seq=41610&promImg=&sublm>

²⁴

http://www.huffingtonpost.fr/olivier-bellamy/un-concert-a-paris-pour-r_b_1341104.html

countries that host Korean Cultural Centres. Some Eastern European countries are also well represented, such as Czech Republic and Hungary.

The only online reference listing events with an Asia-Europe component taking place in Asia and Europe is the ASEF cultural website <http://culture360.org>. Out of the 59 events listed from 13 April 2010 till 18 October 2012 under South Korea (outside the KAMS supported events listed in the performing arts sections), 11 events with a European component have taken place in South Korea, particularly in the fields of performing arts, cultural exchange, cultural heritage and visual arts; 13 events with a stronger South Korean dimension have taken place in EU countries, in the fields of dance, visual arts, new media and films. Beyond the countries mentioned above, Belgium, Hungary, Greece, Czech Republic, Slovenia, and Bulgaria were involved²⁵.

The section related to the mobility of artists and culture professionals²⁶ also provides information on the level of cultural exchange beyond official channels.

1.4. South Korean perceptions about Europe and European culture

No specific study or research has been found on how South Koreans see European culture. However an email interview and a short meeting²⁷ with Dr Sung-Won Yoon, researcher for South Korea for the ASEF publication *Asia in the Eyes of Europe, Images of a rising giant*²⁸ is in many regards very insightful on the sectorial views of South Koreans about the EU in general. According to Dr Sung-Won Yoon's researches, **South Koreans consider the EU an important economic player in the world market**. This is partly due to the fact that most South Korean news about the EU concerns economic and trade issues: in the case of the negotiations and implementations of the Free Trade Agreement (FTA) between the EU and South Korea (negotiations since 2006, implementation in July 2011), the news mainly related to the negotiation process and the impact assessment on South Korean economy.

On the other hand, South Koreans consider the EU politically weak on the international scene. Nothing seems to be known about the EU's global influence regarding issues such as human rights, environment, and development. South Korean media rarely cover them. South Koreans' perception has not changed much over the time, as proved by the findings of four different perception studies carried out in the 2000s²⁹.

²⁵ <http://culture360.org/category/events/?cntry=korea>

²⁶ See below, section 2.4.

²⁷ In Seoul Art Museum on 30 October 2012.

²⁸ http://www.asef.org/images/docs/PR20120618009_Perceiving-Asia-and-Europe.pdf: *Asia in the Eyes of Europe, Images of a rising giant* (ASEF, 2012) Dr Sung also collaborated to the chapter about the audio-visual sector included in this report (see Chapter 3 below).

²⁹ "Four studies" means four rounds of perception researches in South Korea. There is no link for individual studies, which were published either as a journal article or a book chapter. However, there is a website on EU external perceptions: <http://www.euperceptions.canterbury.ac.nz/index.shtml>

In terms of image, some South Koreans still confuse the EU and single European countries. When they are asked about the image of the EU, they tend to say that it is a desirable travelling destination. However, because of the geographical distance Europe is an expensive place to visit and thus has an exotic and luxurious image for the average South Korean.

When it comes to culture, South Koreans admire the long and rich cultural traditions of Europe, as they have a very good impression of Europe's cultural dimension. They know that Europe is the origin of traditions in various cultural fields – music, painting, cinema – and sports, especially football. However, particularly since the FTA negotiations started, more and more people consider the EU and Europe differently. For them, **the EU is usually associated with trade, whereas Europe is associated with travelling and culture.** This important distinction is one of Yoon's observations based on her recent perception study. In the cultural field, the EU is not particularly understood as an entity. However some European countries are particularly involved in cooperation with South Korea, either within or beyond the official channels. The Protocol on Cultural Cooperation is usually not very well known by the **people interviewed for this mapping**³⁰. However, as reported from the survey on South Koreans' perceptions about the EU, the FTA is having an impact on the view of Europe as a cultural entity.

When thinking about Europe, South Korean people will generally name the United Kingdom, France, and Germany – the “big 3” in Yoon's words. However, the 2012 study results showed some changes in their perception. South Koreans think of Germany, Greece, Spain, Ireland as well as the UK and France. Instead of the usual “big 3”, they seem to think more about the Member States that are most suffering from the financial crisis, probably because South Korean media often report about them. South Koreans tend to have a good image of the “big 3”, especially Germany, considered as a key player in resolving the financial crisis. Eastern European countries are normally perceived as economically less dynamic, and Southern countries as a good place to travel, but domestically complicated because of political lack of transparency.

According to the abovementioned report, South Korea is in 4th place among the Asian countries most often covered by the European press, and in 6th position as an Asian country important for the future (after China, India, Japan, Australia and Singapore).

Dr Yoon finally stresses the fact that the **teaching of European languages in schools and universities** – apart from English – is **not a priority**³¹. Japanese and Chinese languages³²

³⁰ Annex 1: List of interviews (emails or direct exchange)

³¹ For instance, as far as the French language is concerned, its teaching has not been compulsory since 2001 in the South Korean school system. This has led to a tremendous decrease of learning of French (350,000 in early 2000 and ten times less ten years later).

Information obtained from an internal report on the publishing sector in Korea, by the Bureau International de l'Édition Française, April 2010. <http://www.bief.org/Pays-502-Asie---Oceanie/Coreee-Du-Sud.html>

³² For historical reasons, the teaching of Japanese, Chinese and Russian was forbidden until 1995.

are among the top studied foreign languages after English and “*there are only a few universities which offer European Language Department (such as the Hankuk University of Foreign Studies in Seoul). Students are not given many chances to learn European languages until they enter university. Such limited availability restricts any potential chances to foster language experts in various European languages*”. This lack of language learning opportunities may also affect the deeper interest of South Korean in European culture and its diversity.

1.5. South Korea’s cultural policy and cultural diplomacy: priorities and trends

A general introduction³³

An interesting and clear resource to understand South Korea’s current cultural policy strategy is the introduction by Ms Kiwon Hong on Korea’s cultural policy, written for the South Korea entry in the World CP-International Database of Cultural Policies³⁴.

The Japanese colonial period followed by the Second World War and the Korean War had a direct impact on the development of cultural policy in Korea. **National cultural infrastructures flourished in the 1940-50s** (the National Library, the National Museum, the National Theater and the National Korean Traditional Music Institute), **however the first Law to promote Culture and the Arts was only enacted in 1972**. This period was characterised by a centrally-planned building of important infrastructures at a national and local level but with no contents associated to it and no attention to the audience in general. **The 1980s, despite the economic growth, did not impact on artistic and cultural expressions due to the failure of democratisation of the country**. This situation also affected the promotion of Korean culture overseas: the technical counsellor to the *Centre Culturel Coréen* in Paris, Mr Georges Arsenijevic, recalls that at that time, almost no cultural venue in Paris - except for the *Maison des Cultures du Monde* - was willing to cooperate with the Korean cultural centre because of the oppressive South Korean regime.

The 1990s were a turning point for public cultural policies, in particular since the appointment of the writer Uh-Ryungin Rhee as minister of culture in 1994³⁵. As Ms Kiwon Hong highlights: “*The year 1994 marked the nominal beginning of democratic government that drew a line away from the authoritative military government in the past. Policy focus moved from regulation to autonomy, from central to local, from producer to consumer, and from division to unification*”.

³³ Annex 2 includes a list of selected culture and arts related organisations in South Korea.

³⁴ <http://culture360.org/magazine/korea-an-introduction-to-cultural-policy-part-i> and <http://culture360.org/magazine/korea-an-introduction-to-cultural-policy-part-ii/>

Kiwon Hong is Associate Professor at the Graduate School of Public Policy and Industry, Sookmyung Women’s University, South Korea. She also serves as Director of the Cultural Policy and Administration Programme at the School.

WorldCP-International Database of Cultural Policies: <http://worldcp.org>

³⁵ <http://www.mcst.go.kr/english/aboutus/history.jsp>: Chronology of the Ministry of Culture, Sport and Tourism (established under this denomination on 29 February 2008)

However the **1997 financial crisis** had a considerable impact on South Korean cultural policy, establishing a **more commercial priority**: the focus moved to cultural and creative industries, the financial returns they offer, and the social impact of culture. In spite of the financial crisis and the recurrent changes of ministers of culture, which may affect the long-term vision of South Korean cultural policies³⁶, relatively consistent efforts have been made to keep the cultural budget at around 1% of the total State budget³⁷.

Key characteristics of South Korea's cultural policy

Hong highlights three main characteristics of the South Korean cultural policy:

- 1) The **balance between commercial and public interests**,
- 2) The **investment in the cultural welfare of citizens** and
- 3) The **acknowledgement of multiculturalism**.

These features - related in particular to the economic dimension of culture and access to culture for all - were particularly highlighted in the *Study on Analysis and Prospects of Arts and Culture Trends 2012*³⁸ produced by the Korean Culture & Tourism Institute.

*“Culture Minister Kwang-shik Choe emphasised the **industrial and economic values of the Korean wave in its contribution to job creation as a rising export component**. To make the Korean Wave led by K-pop become a long-lasting cultural phenomenon beyond a momentary syndrome, the ministry will strive to diversify the sources of the Korean Wave potentially to traditional Korean culture, tourism, and sports among others, added Choe. Moreover, with the five-day school-week becoming effective in 2012, a plan to run Saturday schools was also announced that day. The Saturday schools will offer opportunities for students to attend various cultural programs. In this effort to realise the **full potential of the cultural enjoyment of the people**, the Culture Ministry decided to increase the budget allocated to cultural vouchers - from KRW 53.8 billion³⁹ (for 1,26 million people) in 2011 to KRW 73.7 billion (for 1,71 million) in 2012 – “ultimately to benefit children and under-privileged groups”⁴⁰.*

As far as the Korean Wave *hallyu* is concerned, *“the Ministry of Culture, Sports and Tourism will form a KRW 12 billion fund to support original South Korean musicals and establish a K-Arts Academy to help create new sources of cultural products. The Culture Ministry announced plans at the end of February at Culture Station Seoul 284 to further expand*

³⁶ Annex 5: List of ministers of culture since 1945

³⁷ Annex 6: Percentage of South Korea's yearly budget for culture

³⁸ http://www.kcti.re.kr/eng_05_1.dmw?method=view&reportId=1&isSearch=true&reportCategory=-1&reportTitle=false&userName=false&reportSeq=535&pageNum=1&groupNum=1

³⁹ KRW: Korean Won. For currency exchange rate: <http://ec.europa.eu/budget/inforeuro>

⁴⁰ This plan is in line with the "Art New deal Project" approved in the context of global economic crisis in 2008: <http://www.korea.net/NewsFocus/Policies/view?articleId=90614>

*hallyu, the Korean Wave, through Korean arts. It will spend KRW 54.4 billion this year toward the project and increase the budget in the following year in cooperation with the Ministry of Strategy and Finance. The latest plan is the second such announced by the ministry aimed at boosting hallyu. The first plan announced in January emphasizes traditional culture*⁴¹.

If the **hallyu phenomenon** was limited to the Asian countries for the first few years, it has nowadays evolved into an **international** phenomenon, recently reinforced by the worldwide success of *Gangnam Style* by DJ Psy. This K-pop invasion is particularly reaching out to young people – including in Europe – through social networks. The Ministry of Culture, Sport and Tourism is for instance supporting the K-Pop World Festival that gathers teams of participants from all over the world including Europe (in 2011 Czech Republic, Spain and United Kingdom⁴²). Korean cultural centres in Europe seem to perceive the support to *hallyu* and the K-Pop in different ways. Mr Lee, Director of the *Centre Culturel Coréen* (CCC) in Paris sees the Center as a facilitator in terms of communication about K-Pop (for instance for the concert of *Super Junior* on 6 April 2012 at the Paris Zenith concert hall for which the CCC organised a press conference). For the Korean Cultural Centre in London, K-Pop is part of its overall strategy, which translated into the implementation of the K-Pop Academy⁴³.

Positioning at a multilateral and regional level

The ratification of the UNESCO *Convention on the Diversity of Cultural Expressions* (2005) can be considered as an important step in a country which places great emphasis on **the promotion and preservation of Korean culture**⁴⁴, promotion of active art creation and development of various genres, provision of support for traditional art creation, and the use of culture and tourism resources. This ratification is linked to different reasons and in particular the pressure from South Korean cultural stakeholders (including cinema professionals) to protect national cultural industries, the care taken by the South Korean government in promoting cultural export to avoid being accused of cultural invasion (a sensitive issue considering its past history), changes in South Korea's economy and the recent migration of foreign workers which has an impact on the homogeneity of the South Korean population.

South Korea is finally working to **position itself as a cultural focal point in the East-Asian region**: “*To prevent anti-hallyu sentiments in Japan and China*⁴⁵, the Culture Ministry plans to select an “**East Asia culture and arts creative city**” in 2014 and encourage cultural

⁴¹ <http://nwww.koreaherald.com/view.php?ud=20120228001107>

⁴² <http://www.mcst.go.kr/english/issue/issueView.jsp?pSeq=2476>

⁴³ <http://www.kccuk.org.uk/navigator.do?menuCode=200901120051&action=VIEW&seq=39996&promImg&subIm>

⁴⁴ Also included in the nation branding strategy of South Korea:
<http://www.koreabrand.net/gokr/en/cms/selectKbrdCmsPageTbl.do?cd=0120&m1=1&m2=5>

⁴⁵ There were demonstrations in both countries (but also in Vietnam and other Asian countries) to protest against the South Korean *Hallyu* considered as a cultural and commercial flooding of contents, with no reciprocity rules.

exchanges among the three countries. It will also spend KRW 600 million this year to make cultural contents relating to a common theme among the three neighbouring Asian countries - paper road and silk road⁴⁶. Considering the relatively low level of exchange and mobility of artists and cultural professionals in the East-Asian region, or at least the limited existing support mechanisms for mobility, South Korea's engagement in this field is quite noticeable⁴⁷.

Balance of public and commercial values in the field of culture, access to culture for all, recognition of multiculturalism and East-Asian positioning are some of the key driving forces of Korea's cultural policy and cultural diplomacy. In addition, and despite the fact that they are not yet fully developed or just emerging, two other aspects related to cultural policy in South Korea are very similar to EU concerns for culture and sustainability: **the interest in environmental issues and the research for alternative sources of funding.**

In 2008, the Ministry of Foreign Affairs and Trade (MOFAT) launched "**Global Issue-based Cultural Events**" as a means of advancing cultural diplomacy, in order to raise the awareness of the international community and the South Korean people about global issues. Following the first year on "poverty" (2008) and the second year on "climate change" (2009), in 2010 the Ministry held cultural events on "Green-Growth"⁴⁸, which included two performances and an exhibition⁴⁹. For the year 2012, the Ministry of Culture, Sports and Tourism urged the need to set up a favourable environment for a sound cultural ecosystem that integrates social cohesion, cultural donation, and fair trade, while also bringing up convergence and communication as key words in its objective-sharing⁵⁰. In this context, the Korea Culture & Tourism Institute has undertaken research related to the environmental impact of culture (summaries are available in English): *Agendas and Directions of Cultural Policies Responding to Future Environmental Changes*⁵¹, *A Plan to Estimate Carbon Emission and Manage the Goal to Reduce Carbon Emission on Culture Infrastructure*⁵² and *Cultural policy in the era of "Green growth"*⁵³.

Another interesting policy initiative by the Arts Council Korea (ARKO), a key funder of South Korean cultural infrastructures and projects, is the new fundraising campaign "**Crowd-**

⁴⁶ <http://www.koreaherald.com/view.php?ud=20120228001107>

⁴⁷ Please refer to section 2.4.

⁴⁸ On his congratulatory speech in August 2008, the current South Korean President Myeong Bak Lee emphasised three core values for his country: a law-abiding spirit, green growth and the importance of nation branding. <http://www.koreabrand.net/gokr/en/cms/selectKbrdCmsPageTbl.do?cd=0118&m1=1&m2=3>

⁴⁹ http://www.mofat.go.kr/ENG/policy/culture/overview/index.jsp?menu=m_20_150_10

⁵⁰ <http://www.korea.net/NewsFocus/Policies/view?articleId=90614>

⁵¹ http://www.kcti.re.kr/eng_05_1.dmw?method=view&reportId=1&isSearch=true&reportCategory=-1&reportTitle=false&userName=false&reportSeq=530&pageNum=1&groupNum=1

⁵² http://www.kcti.re.kr/eng_05_1.dmw?method=view&reportId=1&isSearch=true&reportCategory=-1&reportTitle=false&userName=false&reportSeq=465&pageNum=4&groupNum=1

⁵³ http://www.kcti.re.kr/eng_05_1.dmw?method=view&reportId=1&isSearch=true&reportCategory=-1&reportTitle=false&userName=false&reportSeq=433&pageNum=5&groupNum=1

Funding” launched in March 2011. The Council collects funds from an online collective of patrons according to the requests of artists/ arts organisations. However, if the target amount is not reached, the funds will be returned to the donors. Crowd-funding is not yet widespread in Asia (and is not as developed in Europe as it is in the US) but this initiative may be interesting to follow for many reasons, firstly as an attempt to find alternative ways to fund culture and arts and also because of the direct involvement of an institution like the Arts Council (normally crowd-funding is directly managed by grant seekers through online platforms)⁵⁴.

⁵⁴ <http://fund.arko.or.kr>

2. Focus on Specific Cultural Sectors

This section focuses on the main trends of four sectors: **publishing, performing arts, cultural heritage and the mobility of artists and cultural professionals**. It includes, where possible, quantitative data and reviews the potential for international investment and exchange.

2.1. The publishing sector: towards the digital area

Key organisations and events

Korean Publishers Association: <http://eng.kpa21.or.kr/main/index.htm>

Literature Translation Institute of Korea: <http://eng.klti.or.kr/>

Seoul International Book fair: <http://www.sibf.or.kr/en/product/index.htm#>

Seoul International Writers' Festival: <http://siwf.klti.or.kr>

Paju Book City: http://www.pajubookcity.org/english/sub_03_01.asp

Some key events in Europe have strengthened the South Korean publishing sector in Europe. South Korea was Guest of honour at the **Frankfurt Book Fair in 2005** and at the **Children's Book Fair in Bologna in 2009**. In 2011, a South Korean author won for the first time the Ragazzi Award in the non-fiction category with *The House of The Mind: Maum* (Changbi Publishers) by author Hee-kyung Kim and Polish illustrator Iwona Chmielewska⁵⁵.

For the first time, an Asian woman won the **Man Asian Literary Prize in 2012**: Kyung-sook Shin with the title *Please look after Mum*⁵⁶.

Important market for children's and education books.

Considerable investment in the e-book business.

European languages most translated into Korean: English, French, German, Italian and Spanish (but also more recent development of Czech)

⁵⁵ http://www.koreatimes.co.kr/www/news/art/2011/04/142_82083.html

⁵⁶ The success of the South Korean winning novel in translation was highlighted by the international press on the recent announcement that the Man Group were withdrawing their sponsorship of the prize.
<http://www.guardian.co.uk/books/2012/oct/18/man-asian-literary-prize-loses-sponsorship>

Public policies in the South Korean publishing sector and general characteristics of the sector⁵⁷

1987 saw the liberalisation of the establishment of publishing companies, and February 2003 marked the enactment of the Publishing and Printing Industry Promotion Act. The South Korean publishing industry operates in due recognition of and respect for the international copyright laws including International Conventions (Paris, Berne, Geneva), the World Copyright Agreement and the TRIPs (WTO). South Korea is the only country among the Organisation for Economic and Co-operation Development (OECD) member countries to have implemented comprehensive publishing industry promotion policies, including among others: exemption of Value Added Tax (VAT) on publications and e-books, enforcement of the authentication system and support for the modernisation of the distribution system.

To reinforce the foundations for a knowledge-based society in the 21st century, South Korea has formulated eight specific policies that are:

- 1) Establishment of an infrastructure for the publishing industry;
- 2) Laying the foundation for the publication of worthy books and support for a professional workforce;
- 3) Acquisition of status as the world's leading country in the electronic publishing market;
- 4) Promotion of printing industry culture;
- 5) Laying the foundation for modernised and systematic book distribution⁵⁸;
- 6) Reinforcement of the international competitiveness of the Korean publishing industry;
- 7) Promotion of domestic publishing; and
- 8) Promotion of South-North exchange in publishing.

Copyright protection extension following the Korea-US FTA: the Korea-US Free Trade Agreement, signed in June 2007, extends the copyright protection period by twenty years, thus protecting the author's copyright for up to 70 years after death. The domestic Copyright Act was also amended accordingly, leading to extended protection for authors from South Korea, Europe and most other countries in the world. The extension was widely felt to be a blow to the Korean publishing industry (organised within the Korean Publishers' Association), which already works under an imbalance in the copyright trade.

⁵⁷Most of the information is extracted from the KPA's website http://eng.kpa21.or.kr/bbs/board.php?bo_table=policy (information dated 2008), the online article by Tracy Manning <http://southkorea20309.wordpress.com/2011/07/09/textbooks/> and from an internal report on the publishing sector in South Korea, by the Bureau International de l'Édition Française, April 2010. <http://www.bief.org/Pays-502-Asie---Oceanie/Coree-Du-Sud.html>

⁵⁸ One can note a decrease of the number of bookshops between 2003 and 2010. See Annex 7 for the most important bookshops in South Korea.

General characteristics of the book market

According to the Korean Publishers Association (KPA), in 2010 there were about 35,000 South Korean registered publishing houses. However only **2,623 publishing houses**⁵⁹ are considered **active** with at least one title published in the previous year. 150 publishing houses of the 2,623 have published more than 50 titles per year. The KPA estimates that the South Korean publishing market is worth around US\$ 4 billion (2009).

Children's books enjoy the largest market share at 16.4%. However, if multi-volume sets are included, the children's book market share would account for an impressive 30% of the total market⁶⁰. The second largest share is for literature. Books in foreign languages get 10% of total market share, the same as **education books**. This sector (i.e. education) is very profitable since the average production run is 9,000 against an average print run of 2,600 for all categories combined. The profitability of the education book sector, combined with that of children's books, illustrates the enormous investment by families in their children's education, a result of the very demanding requirements of the whole educational system⁶¹.

South Korea's book exports continue to rise due to the spread of the **South Korean Wave hallyu**. According to the Korean Publishers Association, 1,477 South Korean books were published overseas in 2010 and 1,427 in 2009. This marks a dramatic increase compared to 2001, when only 20 South Korean books were published outside South Korea.

China and other Asian countries are the biggest markets for South Korean books abroad: over the last two years, China has accounted for 41% of the trade, followed by Thailand, Indonesia and Taiwan.

Children's books are the most popular genre, accounting for 62% of the total, followed by literature, comics, language books, social science books and books on technology. According to the Korean Publishers Association, America and **the United Kingdom** have also seen increases in the publication of South Korean-authored books, boding well for the future of South Korean works in the international market⁶².

The e-book business

As regards the e-book market, in 2010 the Korea Electronic Publishing Association unveiled measures to boost the e-book business. The association announced that it would hold education programmes to teach writers and publishers how to produce and distribute e-

⁵⁹ A selection of publishing houses is included in Annex 8. The Annex 2 also includes publishing houses specialised in the fields of youth and education.

⁶⁰ <http://southkorea20309.wordpress.com/2011/07/09/textbooks/>

⁶¹ http://www.economist.com/blogs/banyan/2011/05/depressed_students_south_korea

⁶² <http://www.korea.net/NewsFocus/Culture/view?articleId=85581>

books. The association's goal is to help publishers create 100,000 e-books every year since an increasing number of South Korean publishers have not been able to publish physical books because of the shrinking book market. The Ministry of Culture announced its own measures to support e-books in 2011, which include the revision of a law to protect the copyright of e-books, the introduction of a standard pricing system for digital books, the development and implementation of a sharable e-book production facility for small publishers and the distribution of a standard Korean calligraphic style for e-books.

According to a recent survey by Kyobo Book Centre of one thousand South Korean workers⁶³, **Korea's e-book market grew more than five times in 2011, in parallel to an increase in the use of tablets and smartphones**. This may explain why Google has chosen South Korea as the first Asian country to launch its e-book business: "*According to the Korea Electric Publishing Association, the Korean e-book market was about KRW 289.1 billion last year. The association also predicted that the market would double in size in 2013 and make up 20% of the total publishing market at that point*"⁶⁴.

One can also highlight the creation in May 2009 of the **Seoul National Digital Library** under the National Library of Korea, a fully digital library⁶⁵. Finally the most successful **bookshops** are those providing an **online selling system** such as the chains Kyobo, Interpark and Aladin⁶⁶.

Book fairs in South Korea and Europe

In South Korea, the first **Seoul International Book Fair** was launched in 1995, to mark the 50th anniversary of Korean Independence Day. It is held annually by the Korea Publishers Association in order to promote South Korean publications abroad, to strengthen the competitiveness of the publishing industry, to promote reading among the public, and to allow the public to enjoy diverse cultures through literature. This fair continues to be a good platform for foreign book publishers, particularly in the fields of children's books, education and literature. In 2012, 580 publishing companies exhibited from 20 countries including Europe (France was the Country of Honour in 2010⁶⁷). The Czech Republic was also represented during the 2012 edition of the Seoul International Book Fair, in particular with recent translations of two Czech writers: Karel Čapek and Jan Neruda, with two book publishing houses invited - Open Books and Happy Reading Books⁶⁸.

⁶³ <http://southkorea20309.wordpress.com/2011/07/09/textbooks/>

⁶⁴ <http://www.hancinema.net/korea-turns-a-page-with-e-books-47564.html>

⁶⁵ http://www.dlibrary.go.kr/NEL_ENG/organization/Organization_01.jsp

This digital library allows the users to access data from 1,200 South Korean and international institutions: close to 380,000 titles were reachable in 2010. Related to the more traditional types of libraries, their number has increased over the years in South Korea: 12,709 in 2010 against 10,542 in 2002 (source: <http://www.libsta.go.kr>)

⁶⁶ <http://www.bief.org/Pays-502-Asie--Oceanie/Coree-Du-Sud.html>. See document "organigramme".

⁶⁷ <http://www.bief.org/Operation-3618-Foires-et-expositions/18e-Foire-internationale-du-livre-et-de-Seoul.html>

⁶⁸ http://www.mzv.cz/seoul/en/news_and_activities/seoul_czech_literature_at_seoul.html

Two key events in Europe opened up the path for the South Korean publishing sector: the **Frankfurt Book Fair in 2005** which had South Korea as Guest of Honour and the **Children's Book Fair in Bologna in 2009** where South Korea was also Country of Honour. In 2011, South Korea won for the first time the Ragazzi Award (literature for children and teenagers) in the non-fiction category with *The House of The Mind: Maum* (Changbi Publishers) by author Hee-kyung Kim and Polish illustrator Iwona Chmielewska⁶⁹. Since then, both events have seen a very good representation of South Korean book publishers.

With regards to the considerable investment in **e-book business**, one can highlight the key agreement⁷⁰ signed during the **London Book Fair in May 2012** between the Strategic Book Publishing and Rights Agency (SBPRA) and the Language World Digital (LWDigital). **SBPRA has contracted with Language World Digital (LWDigital), a South Korean-based distributor, for over 700 e-book titles.** Through the contractual agreement, *“LWDigital will sell, distribute and market our e-Books through LWD’s extensive online retailers and libraries in Korea. Included titles will be sold through online e-Book shops, mobile carrier’s online market place for e-Books, and libraries of corporate, institutes, schools and colleges”.*

Translations: general trends and South Korean initiatives

In 2008 43,099 titles were published in South Korea, representing a 4.9% increase from the previous year, and **translations** of works originally written in a foreign language account for **31% of the total number of published titles.**

About 80% of the translations come from Japan (including 2,404 out of 4,592 comic book titles), followed by the U.S. (3,992) and **the United Kingdom (1,129)**. The rest is shared by countries such as **France (820), Germany (599)**, China (507), **Italy (171)** and Russia (146). The largest number of translated titles was in the **children's book category** (3,586), followed by literature (2,478) and comics (2,472) (KPA, 2009).

Again it is worth mentioning the collaboration in the literary field between the Czech Republic and South Korea: the May 2012 Prague International book fair hosted the presentation of the first Korean children book translated into Czech language and published by the Czech “Ideal Publishing House”⁷¹.

The Literature Translate Institute of Korea (LTIK), created in 1996, lists in its website the various titles translated⁷². The LTIK, which works toward a more prominent presence of

⁶⁹ http://www.koreatimes.co.kr/www/news/art/2011/04/142_82083.html

⁷⁰ <http://bookforeignrights.com/london-book-fair-2012-show-report/>. The digital platform is not yet online (initially planned for July 2012)

⁷¹ <http://www.koreatimes.co.kr/www/news/include/print.asp?newsIdx=111243>

⁷² http://www.mzv.cz/seoul/en/news_and_activities/seoul_czech_literature_at_seoul.html. “Almost 150 books written by Koreans have been already published in the Czech language, among them both classics by Kim Man-jung and poetry by Ko Un, and also more than 20 volumes of Korean comic books. (...) Some 50 Czech

South Korean literature in the world, also provides funds through grants awarded to European translators⁷³:

- **LTI translation grants:** to make South Korean literature accessible to foreign readers, LTI Korea has published South Korean literature translated into over thirty languages⁷⁴.
- **LTI publication grants:** to contribute to the increase of foreign readership, LTI Korea provides grants to foreign publishers seeking to publish South Korean books in the areas of literature, humanities, arts, and children's literature; and organises a number of events aiming at facilitating the translations of works:
- **International exchange programmes,** including the Seoul International Writers' Festival (which started in 2006 and always includes European writers) and residencies for South Korean translators in the world (including for 2012 in France, Spain and Germany) and for foreign writers in South Korea;
- **Education and information programmes** including the Annual International Workshop for Translation and Publication of Korean Literature and the LTI Translation Academy with intensive courses on translation in Russian, German, English, French and Spanish.

Also a private foundation plays an important role for translation. **The Daesan Foundation** (under Kyobo Life Insurance Company) is engaged in **projects of public interest**, including *Grants for the Translation of Korean Literature and World Classics* (into English, French, Spanish and German)⁷⁵ and international literary exchanges with France, Germany and other countries⁷⁶.

Paju Book City

Finally it is worth mentioning that close to Seoul, **Paju Book City**⁷⁷ has been created. This is a unique project of an entire city dedicated to the publishing industry, housing more than 200 publishers, printers, literary agents, design firms, bookbinders, and distribution facilities in its 160 buildings spread over 385 acres. The building of the complex began in 1989 with private funds from various publishers. It also benefited from both government support and cheap land, located three miles from the demilitarised zone separating North and South Korea. The location was indeed the main selling point for many of the publishers now housed in the complex. In the past the publishing industry suffered from an inefficient distribution centre; the Korea Publication Distribution Company (KPD) has now built a state-of-the-art

children's books saw Korean editions, as well as at least 10 titles of Czech modern and contemporary literature that were translated into Korean in this and last year alone".

⁷³ http://eng.klti.or.kr/e_main.do (for the different types of supports, please refer to the programmes section)

⁷⁴ Including the following European languages: English, French, German, Dutch, Danish, Rumanian, Lithuanian, Bulgarian, Estonian, Italian, Czech, Portuguese, Polish and Hungarian.

⁷⁵ http://daesan.or.kr/form.html?d_code=9870

⁷⁶ http://daesan.or.kr/eng/business.html?d_code=6534

⁷⁷ Sources: <http://southkorea20309.wordpress.com/2011/07/09/textbooks/> and <http://www.pajubookcity.org>

automated distribution centre. The KPD is a collective owned by over 400 Korean publishers and booksellers, providing central distribution services that take advantage of Paju's efficient and modern rail, road and waterway links. Its activities tend to **focus on Asia**, as shown by the Paju Book City forum, the yearly Exchange Symposium of East Asian books and the building of a guesthouse for the Asia Publication Culture and Information Centre, with its facility management and its operation section.

2.2. Performing Arts and Music: a marketing approach to cultural exchange

Key organisations

Korea Arts Management Service (KAMS): <http://eng.gokams.or.kr>
and the APRO online system providing information and statistics about the Performing Arts Sector in Korea: http://eng.theapro.kr/?sub_num=31⁷⁸
Arts Council Korea (ARKO): <http://www.arko.or.kr>

Key events and venues in South Korea

Performing Arts Market in Seoul (PAMS): <http://en.pams.or.kr/>
Seoul International Dance Festival: <http://www.sidance.org>
Hi Seoul Festival: <http://english.hiseoulfest.org>
Seoul Performing Arts Festival: <http://www.spaf.or.kr/2012english/>
Seoul Spring Festival of Chamber Music: <http://www.seoulspring.org>
Chuncheon International Mime Festival: <http://www.mimefestival.com/>
Great Mountains International Music Festival: <http://www.gmmfs.com/main.html>
Gwangju–Hub City of Asian Culture Project:
<http://www.cct.go.kr/AAT2012/eng/main/main.html>

Key events that open the path to a better recognition of the South Korean performing arts scene in Europe

- **Festival d'Avignon, France, 1998**, with the first Korean performance "Les coréennes" (production Festival d'Avignon and artistic direction by Joon-hyuk Kang⁷⁹).
- Herald Angel Award and Theatre Award at the **2007 Edinburgh Fringe Festival** to Do-Wan Im and the Sadari Movement Laboratory⁸⁰
- Touring of **South Korean productions related to Shakespeare's adaptations**⁸¹

⁷⁸ TheApro also provides news, opportunities, in depth interviews, international touring listings etc. Judith Staines has been since 2011 a member of the International Editorial Committee for KAMS and provides information from Europe on a monthly basis, alongside colleagues covering Asia and North America.

⁷⁹ http://www.coree-culture.org/-novembre-1998_129-.html (in French)

⁸⁰ http://asianow.kr/menu02/m02_sub01.html

⁸¹ As introduced in the KAMS publication *An overview of Korean Performing Arts: Theatre in Korea* (December 2010), page 24. "In the last decade or so, Korean theater also witnessed sudden popularity for its Shakespearean adaptations, most of which were characterized with a young, free and experimental style. Shakespeare is now revisited and refurbished as a global cultural icon in Korea as he is around the world. Since its premier in Korea (1995) *Romeo and Juliet* of OH Tae-suk 's *Mokhwa* Repertory Company has toured in Europe and Asia for more than 10 years".

- Opening concert for Womex 2010 in Copenhagen under the title “The Chaosmos of Korean Music”⁸²

General characteristics: A field funded by the central and local governments, as well as by private organisations. A market approach to performing arts (with a more recent opening up to international exchange and networking). A focus on music and traditional arts (exports) and on music, classical in particular (imports).

A relative good representation of EU countries in terms of incoming and outgoing activities but lack of diversity of forms presented. Challenges of co-productions.

General characteristics of the Performing Arts Sector⁸³

The following data were gathered by KAMS, established in 2006 as a public and not-for-profit foundation “*to boost the industrial competitiveness of the Korean arts*” with the support of the Ministry of Culture, Sports and Tourism. The objective of KAMS is to make the **South Korean performing arts market more competitive** through research, support grants for the participation in key international performing arts events or collaboration projects (in particular through the scheme KAMS Connection).

In terms of **size of the performing arts market**, there are **3,034 businesses**, 56,798 employees and sales of KRW 549.3 billion. While the number of performing arts facilities increased to 820 in 2010 (from 662 in 2007), the number of performing art companies decreased by 230 units in 2010 (total of 2,214), and the number of employees nearly halved (47,175 in 2010 against 80,517 in 2008). According to KAMS researchers, this is partly explained by the substantial drop in the part-time performing members of these companies. **Among the performance venues surveyed, 39.6% are privately-run facilities, 23.4% are public arts and culture centres and 22.6% run by public organisations.** One can note that the private facilities are better ranked in terms of sales (45.5% against 32%) but employ fewer people (27.5% against 39.4%).

Western music companies and theatre/musical companies are the top ranked in terms of business companies and total sales. Theatre companies amount to 56.8% of the total sales. The share for dance, Korean traditional music and multidisciplinary genre groups remain small (15% in total). The strategy of many performing arts venues is to programme types of performances that are popular with the public in order to attract large audiences.

In terms of **public funding** for the performing arts sector, the budget comes both from **central government** (KRW 147.7 billion in 2010 for national performing arts facilities,

⁸² http://eng.theapro.kr/main.asp?sub_num=62&pageNo=4&state=view&idx=5741

⁸³ General introduction about KAMS at: http://eng.gokams.or.kr/06_about/greeting.aspx

Data from KAMS' 2011 survey on the performing arts (as of 2010): http://eng.theapro.kr/html/2011_0703.pdf

activities of national performing arts companies, establishment of national/public performing arts facilities and subsidies for performing arts activities and festivals) and from **local government** (KRW 776.7 billion for the same budget lines but more focused on facilities and activities/festivals). **Central government** allocated **11.2%** of the total arts and culture budget to the performing arts sectors, **while local government authorities allocated 30.6% of their arts and culture budgets to these fields.**

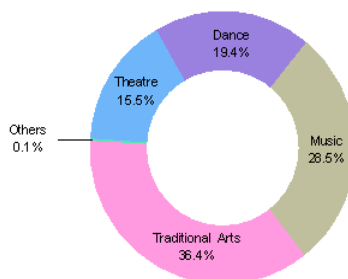
Focus on South Korea's out-bound programmes: genres and geographical destinations

KAMS also surveys and reports every year since 2007 on the status of **international exchange of South Korea with foreign countries**, covering in particular theatre, dance, music, and South Korean traditional arts⁸⁴.

Approximately KRW 4.9 billion was allocated from national treasury funds, for the promotion of international exchange of performing arts in 2010. A number of agencies and organisations sponsored the exchange activity, including the **Arts Council Korea (ARKO)**, **the Korea Foundation**, **KAMS** as well as other local arts and culture foundations.

Reviewing the activities for international exchange over a three-year period from 2008 to 2010, an increasing number of South Korean performers (274 in 2010, i.e. an increase of 23.6% compared with 2008) performed ever more shows internationally (715 shows, i.e. an increase of 43% compared with 2008).

With regards to genre, since 2008, **music stood out** in terms of the number of performers and that of shows despite the fact that **traditional arts** are still dominant in terms of outbound programmes. On the contrary, theatre witnessed a steady decline over the same period.



http://eng.theapro.kr/?sub_num=31

Report on International Exchange 2010, page 6

Europe hosted most of the activities of South Korean artists performing internationally (37.8% including 4.91% for Russia), followed by Asia (32.9%), North America (19.2%),

⁸⁴ http://eng.theapro.kr/?sub_num=31

South America (5.7%), Africa (3.1%), and Oceania (1.4%). **Germany, Spain, Russia and France** are among the top countries visited.

Again in 2010, 166 South Korean organisations participated in 124 overseas festivals, and performed 190 times. Europe attracted the largest number of performers including Russia, with 59 festivals, followed by Asia (41) and North America with 14 festivals. Europe and Asia hosted almost 80% of the entire body of shows (47.9% for Europe and 31.6% for Asia)⁸⁵.

Considering South Korean performers by discipline, **music organisations** topped the list with 619 performers travelling overseas and performing (74.1% of all the South Korean shows performed overseas). Music was the discipline marking the highest average of shows per company, at 1.92.

Such an international presence is linked to the **pro-active initiatives of KAMS**: since its inception in 2006, KAMS has been very active, both as a member of international networks and federations and by signing agreements and partnership contracts with foreign organisations, including European ones, as shown below.

Focus on membership of European organisations 2006-2010⁸⁶: IETM

Focus on contacts 2006-2010 (selection): Edinburgh Fringe Festival (UK), BPAM (Greece), Tanzmesse (Germany), Babel Med Music (France) and agreements: Visiting Arts (UK), Dance Info Finland (Finland), European Forum of Worldwide Music Festival (EFWFM), RASA Center for World Cultures (Netherlands) and Catalan Performing Arts & Fira Tarrega (Spain).

These agreements or memoranda of understanding set a framework for collaboration and presentation of Korean works or co-productions in European venues.

Some of the key events taking place through KAMS support were the KAMS-EFWMF in 2010 in seven European festivals/venues⁸⁷ and the KAMS-UK and KAMS-Finland Connection collaboration projects (see further below).

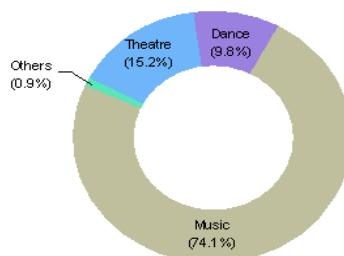
Focus on South Korea's inbound programmes: genres and geographical origins

Concerning **inbound activities, European performers were the most active: 52.4% of the total**, followed by Asian artists (21.9%) and North American artists (15.5%). Europe also topped the average number of shows per performer category with 1.95. **Music** is the largest cultural form presented (in particular classical music and choirs).

⁸⁵ However no information is given on the Festivals attended.

⁸⁶ http://eng.gokams.or.kr/06_about/history.aspx

⁸⁷ <http://culture360.org/news/korea-europe-music-festival-collaboration/>



http://eng.theapro.kr/?sub_num=31

page 6, Report on International Exchange 2010

Concerning the places where performances by overseas performers took place, **Seoul was the most attractive destination, hosting 577 performers and 801 shows**. Gyeonggi Province came next, hosting 165 performers and 209 shows, followed by Gangwon Province with 54 performers and 105 shows. Seoul took 49.8% of the shows, while Chungbuk, Chungnam and Jeonam provinces collectively constituted less than 1%.

Most important festivals in terms of inbound activities⁸⁸

- 1 Seoul Spring Festival of Chamber Music
- 2 Music Isle Festival in Jeju
- 3 Great Mountains Music Festival & School
- 4 Chuncheon International Mime Festival Hotel
- 5 Jeju International Wind Ensemble Festival
- 6 Hi Seoul Festival
- 7 Seoul International Music Festival
- 8 International Children's Choir Festival
- 9 Busan Choral Festival & Competition World Vision
and Seoul International Dance Festival
- 10 Jarasum International Jazz Festival

Seoul as an important performing arts marketplace

Created in 2004, Performing Arts Market Seoul (PAMS) has served not only as a promotion vehicle for completed works, but also as a platform for communication, sharing and collaboration. In 2012 it aimed to consolidate its role as **a premier Asian platform** through strategic collaboration with performing arts networks around the world and implemented the LIP programme (Looking for International Partners). The programme introduces ideas and production plans for each stage of "creation", "production" and "distribution" phases, and aims to find domestic and overseas collaboration partners (e.g. actors/actresses, choreographers, co-producers and presenters, etc.).

European performing arts companies and managers attend this annual international meeting

⁸⁸ http://eng.theapro.kr/?sub_num=31: page 12, Report on International Exchange 2010 (extract)

place for performing arts professionals. **Europe has twice been the highlight region for PAMS: firstly in 2007** (coordinated with a International Network for Contemporary Performing Arts- IETM meeting⁸⁹) and recently **in 2012 with a focus on Central European countries** (Visegrad countries-Czech Republic, Hungary, Poland, Slovakia - and Balkan countries).

As regards relations with Europe, the *International Co-production manual. The journey which is full of surprises*, published in English and Korean, co-commissioned by KAMS and IETM, is one of the main concrete outputs and a useful toolkit for European and South Korean performing arts companies, and others, engaging in international co-productions⁹⁰. IETM notes a clear engagement of organisations from South Korea (in particular KAMS) as active IETM members, which makes South Korea, together with Japan, among the most dynamic Asian countries, whereas some larger countries such as China or India are not yet well represented. The last PAMS in October 2012, allowed the Performing Arts Central Europe (PACE) group coordinated by the Czech Institute of Arts and Theatre and funded by the Visegrad Regional Fund to be presented to an international audience and particularly to South Koreans⁹¹.

PAMS' strategy is also to connect to other events in South Korea to maximise the visits of international guests. In 2012 PAMS was linked to the Seoul Performing Arts Festival, Seoul International Dance Festival and Jarasum International Jazz Festival.

Another performing arts form showing good potential for exchange is **street arts**⁹². One of the key people to have promoted these practices since the late 1990s is Dong-Hi Cho, Director of Gwacheon Hanmadang Festival (2006-2009) and then of Hi Seoul Festival since 2010⁹³. This non-verbal arts festival is supported by the Seoul Foundation for Arts and Culture. Such festivals frequently invite troupes and companies from France (where Mr Cho studied arts and management) and also Spain, the Netherlands and United Kingdom. The members of Gwacheon Festival have also set up the Korea Street Arts Centre which focuses on supporting productions and creations, undertaking research and seminars (including one related to street arts in South Korea and Europe⁹⁴) as well as publicity and communication.

⁸⁹ http://eng.theapro.kr/?sub_num=32&state=view&idx=2

⁹⁰ *International Co-production manual, The journey which is full of surprises* (IETM/KAMS). Written and researched by Judith Staines, Sophie Travers and MJ Chung.

<http://eng.theapro.kr/DATA/BBS1/co-production.pdf>

⁹¹ <http://www.idu.cz/en/as-part-of-performing-arts-central-europe-visegrad>

⁹² There was a form of Korean traditional street performance (Madangguk), but it was forbidden during the Japanese occupation.

⁹³ Interview of Mr Cho Dong-Hi, Mook THEAPRO, 2011 (pages 83-88):

http://eng.theapro.kr/?sub_num=32&state=view&idx=20

⁹⁴ *Street Arts Festivals & Companies in Korea*, Korea Street Arts Centre, 2011

http://eng.theapro.kr/?sub_num=32&state=view&idx=18-tab02

The focus of Korean performing arts in terms of international exchange is to a certain extent shifting from outward bound (performing abroad) to exchanging, which raises issues and challenges for co-productions and long-term collaborations between Europe and South Korea.

The challenges of co-productions and collaboration projects

Contemporary forms of South Korean dance and theatre are not yet widely known and understood in Europe. In the field of **dance**, the Korea Foundation has only recently begun to support contemporary forms. The SIDance Festival has played an important role in this area. SIDance was launched in October 1998 when the CID-UNESCO Korean branch sponsored the 13th CID International Conference in Seoul. The purpose of SIDance was to introduce new trends in the international dance community in South Korea, and to introduce South Korean dance to the international community, while increasing public awareness and support of dance. For this festival - which is recognised as South Korea's most important dance festival in terms of size and quality - international exchange plays a prominent role. So far it has led to over 20 international exchanges (co-production, co-sponsorship, exchange of human resources).

Because of this relatively low level of knowledge of each other, a long-term process is needed to allow the collaboration between Europe and Korea, as highlighted by Ms Pirjetta Mulari from Dance Info Finland, the main partner with KAMS for the Korea-Finland Connection project in 2010-2011: *"Two actual co-productions have been realised. A lot of other activities are happening between Korea-Finland Connection participants, developing possibilities from both sides. We are now planning the development of the connection project, the next step. The long lasting aspect is very important, and I feel that we are just now starting to grasp the possibilities between Korean and Finnish dance professionals. It takes time to get to know the contexts at both ends"*⁹⁵.

In terms of venues and international opening, the cultural sector has been evolving faster than the skills and assets of Korean cultural professionals, as noted by Kyu Choi, Executive Producer, AsiaNow (South Korea): *"The idea of commissioning or co-producing is not very well known in Korea. In Korea, many commissioners (...) often get the credit as co-producers but their actual roles are closer to that of supporters or presenters (...) Usually commissioners expect creation of a new show in two months. (...) In terms of international co-production, as a practitioner, I can see a certain change in practice. Co-productions were led mostly by festivals until the end of 1990's and then accelerated by various art markets from 2000s. It seems to go through another change now"*⁹⁶.

⁹⁵ <http://www.danceinfo.fi/activities-and-publications/promotional-activities-and-co-operation-projects/korea-finland-connection-developing-the-co-operation-between-korean-and-finnish-performing-art-fields/>

The quote is from an email interview dated 12 October 2012.

⁹⁶ Pages 126 and 127, <http://eng.theapro.kr/DATA/BBS1/co-production.pdf>

Michele Panella, artistic director of the Intercity Festival in Sesto Fiorentino (Italy), confirms the market-oriented aspect of the South Korean performing arts sector. Each year the Intercity Festival focuses on a different city in the world and in 2013 it will bring the Seoul contemporary theatre scene to Tuscany. Good collaborations have been established with the performing arts scene and institutions in Seoul, overcoming the initial surprise of South Korean organisations, which expected to be approached by a national cultural institution and not by an individual festival (though supported by regional and local government). He also noted that the directors of important South Korean cultural centres are marketing experts, working with a team of people with artistic expertise: this shows a clearly market-orientated approach which is quite different from the most common models of EU cultural organisations⁹⁷.

Long-term processes and the mutual understanding of each other's context is all the more important since performing arts from South Korea, in spite of the abovementioned events and support organisations, are not so well known to professionals and the general public in Europe. Regarding theatre, *"the lack of discourse about Korean theatre in the international theatre community is attributable to several socio-historical reasons: the history of Korean modern theatre is relatively short. Further, it was initiated by Japanese colonialists and interrupted by the Korean War in the early 1950's. In addition, the government's strict censorship was enforced until 1987; it was only the latter part of the 1990s when Korean artists made their way into the international theatre community"*⁹⁸. The public support to touring still however goes more to South Korean music and traditional arts than to theatre.

Finally agreements and memoranda of understanding may be required to underpin co-productions and collaborations, particularly on the South Korean side, but the lack of knowledge of the South Korean performing arts sectors by European institutions can delay the process. Mike Ribalta, Head of the Department of Professionals, Catalan Performing Arts & Fira Tàrrrega signed an agreement with PAMS in 2010 but now lacks the support of the cultural bodies of the Catalan region. For Ribalta, there is the need to disseminate *"the PCC to the Arts Councils Officers of the (European) states and regions with request and advice to implement similar actions (as in article 8) at a national and regional level for active organisations interested in cooperating with the Asian region. (...) This would facilitate the mobility of creators, creations and cultural promoters to the Korean market"*⁹⁹.

⁹⁷ Interview on 12 October 2012

⁹⁸ KAMS, *An overview of Korean Performing Arts: Theatre in Korea* (December 2010), page 24 : http://eng.gokams.or.kr/05_know/publication_view.aspx?idx=115

⁹⁹ Email interview dated 31 October 2012

The Arts and culture city: Gwangju

Gwangju, the “Hub City of Asian Culture Project”¹⁰⁰ is administered by the national government of South Korea. This is the single largest cultural project in the history of the nation. The project aims to forge cultural ties and establish a forum of exchange with the various countries of Asia, and enhance the overall quality of life of the Asian community by transforming Gwangju, one of the six largest cities in South Korea, “into a culture city of novel concepts”. Gwangju has a particular place in the history of South Korea since one of the most important pro democracy demonstrations came to a bloody end on 18 May 1980 there due to the repression of the military government in rule at that time. Gwangju is often introduced as the city for democracy and human rights, besides its current title of “arts and cultural city”- a designation apparently inspired by the example of the European capitals of culture¹⁰¹.

The **Asian Culture Complex** will be the main facility of the hub along with the **Asian Culture Information Agency** and the **Asian Arts Theatre**¹⁰², expected to open in 2014. Calls for applications for the latter and pre-projects have already been implemented¹⁰³. In the field of dance, an Asian Dance Committee was established upon an agreement of 16 Asian Countries in 2011, with the secretariat located in Korea. This committee aims to preserve and cultivate dance resources in Asia and to foster cultural exchanges among Asian dancers and choreographers. The committee aims to launch an Asian Dance Company by 2014 when the Asian Culture Complex in Korea will open¹⁰⁴. This cultural complex reinforces the cultural attractiveness of the city of Gwangju that since 1995 has hosted one of the leading Art Biennales in East Asia. It is among the world’s “most visited” Biennales¹⁰⁵ and welcomed the 1st World Biennale Forum in October 2012¹⁰⁶. Another Biennale with an international dimension is the **Seoul International Media Art Biennale** at the Seoul Museum of Art (SEMA) and the Busan Biennale¹⁰⁷, both scheduled in periods close to the Gwangju Biennale to maximise the attractiveness of the whole series of events, and as part of an intensive cultural branding.

¹⁰⁰ <http://www.cct.go.kr/english/index.do>

¹⁰¹ Information shared by the curator of the Gwangju Media Biennale, Mr Hyungmin Pai.

¹⁰² The famous Belgian theatre artistic director and festival organiser Frie Leysen was appointed director of the Asian Arts Theatre in March 2012. <http://nwww.koreaherald.com/view.php?ud=20120312000898> However this appointment came to an end as reported by email by the Arts Council Korea on 7 November (no explanation provided).

¹⁰³ <http://www.cct.go.kr/AAT2012/eng/main/main.html>

¹⁰⁴ Brunei, Singapore, Indonesia, Thailand, Vietnam, Cambodia, Myanmar, Laos, Philippines, India, Bhutan, Bangladesh, Pakistan, Sri Lanka, Korea and Malaysia. The website was not functioning at the time of the research but email communication was possible via asiandancecommittee@gmail.com

¹⁰⁵ Lee Yongwoo, the current President and founder of the Gwangju Biennale mentioned an attendance of close to 1.6 million people in 1995 but estimates the average bi-annual number of visitors at 400,000 to 500,000 visitors.

¹⁰⁶ <http://www.worldbiennialforum.org/>

¹⁰⁷ <http://www.mediacityseoul.kr/> and <http://culture360.org/magazine/busan-biennale-work-in-process/>

2.3. Cultural heritage: a national and international investment

Key organisations

Cultural Heritage Administration (CHA):

http://jikimi.cha.go.kr/english/about_new/mission.jsp?mc=EN_02_02

National Museum of Korea: <http://www.museum.go.kr>

Korea National Commission for UNESCO: <http://www.unesco.or.kr/eng>

Korea Foundation (quarterly journal on cultural heritage):

<http://www.koreana.or.kr/index.asp?lang=en>

Three bilateral agreements with organisations in France, Hungary and United Kingdom and a framework agreement with Italy exist.

An intensive investment in UNESCO, ICOM and other related international organisations:

- The first General Conference of ICOM to be held in Asia was in Seoul in October 2004¹⁰⁸
- The National Museum of Korea is the Chair of the Asia-Europe Museum Network¹⁰⁹

Key topics for cultural heritage in South Korea

- Intangible cultural heritage
- Cultural heritage property return
- Museum education and use of new technologies
- Protection of cultural heritage (also in relation to climate change)

As previously mentioned and because of Korea's past, South Korea's cultural policy has a great emphasis on Korean traditions and cultural heritage, which is the responsibility of the Cultural Heritage Administration of Korea (CHA).

South Korea's cultural heritage policies: a national and an international engagement

CHA started out as the Former Royal Household Affair Office. It carried out its activities of managing cultural heritage as an agency successively under the aegis of the Ministry of Culture and Information, Ministry of Culture, Ministry of Culture and Sports and the Ministry of Culture and Tourism, until 1998. In May 1999, it was granted the status of an independent government agency of rank 1, and later in March 2004, the status of an agency of a sub-ministerial rank.

CHA is affiliated with eight research institutes, the National Palace Museum of Korea and the National University of Cultural Heritage. Besides CHA, the National Museum of Korea (NMK) and several national museums outside Seoul operate under the Ministry of Culture, Sports and Tourism, and each province runs public museums of their own. The budget has

¹⁰⁸ <http://icom.museum/the-governance/general-assembly/resolutions-adopted-by-icoms-general-assemblies-1946-to-date/seoul-2004/>

¹⁰⁹ <http://asemus.museum/about-us/presidency/>

continuously increased over the last seven years. In 2006, the total budget was KRW 399.5 billion and it was up to **KRW 614.8** billion in 2012.

CHA's missions¹¹⁰ are to design and register cultural heritage, to be responsible for alteration or excavation, provide financial support for conservation and management of cultural heritage and manage Royal Palaces, Tombs and Historic Sites of the Joseon Dynasty. CHA is also in charge of research and training of specialists particularly through the Korean National University of Cultural Heritage.

CHA defines cultural heritage as “*national, ethnic, or global legacies of great historical, artistic, academic, or scenic value, which have been formed either artificially or naturally, and classifies them for management as tangible/intangible cultural heritage, monuments (historic/natural) and folklore property*”. Based on the concept above, those that need special protection are designated as state- or province-designated cultural heritage, and their management is the responsibility of the Administrator of the Cultural Heritage Administration or provincial governors. In addition, properties created in modern times are registered on a separate list for their protection as preliminary cultural heritage¹¹¹.

Important domestic resources: South Korea's heritage is classified under five categories:

- State designated heritage (national treasures, treasures, historic sites, scenic sites, natural monuments, important intangible cultural heritage and important folklore materials);
- City/province designated heritage (tangible and intangible cultural heritage, monuments and folklore materials):
- Cultural heritage materials;
- Registered cultural heritage (the Registered Cultural Heritage refers to architectural structures or monumental facilities of early modern or modern times, that have significant values and thus need to be preserved);
- Undesignated cultural heritage (the Undesignated Cultural Heritage refers to the cultural heritage that needs to be preserved even though it is not designated as State-, City- or Province-designated Heritage).

The **number of state-designated cultural heritage items is 3,645**, classified as follows: National Treasure (317), Treasure (1,780), Historic Site (524), Scenic Site (89), Natural Monument (539), Important Intangible Cultural Heritage (123) and Important Folklore Property (273). There are 5,000 items of designated heritage at local level, and over 520

¹¹⁰ http://jikimi.cha.go.kr/english/about_new/mission.jsp?mc=EN_02_02.

Beyond the CHA's provided information, the Korea Foundation has been publishing since 1987 *Koreana*, a quarterly magazine dedicated to increasing awareness about Korea's cultural heritage overseas as well as providing information about current artistic and cultural activities: <http://www.koreana.or.kr/index.asp?lang=en>

¹¹¹ Information based on an interview with Minok Kim from the Cultural Heritage Administration on 2 November 2012.

items registered as preliminary cultural property. All information about each site and item is available online¹¹².

There are **344 public museums** in South Korea, including 29 funded and operated by central government. The most important museums are the National Museum of Korea, the National Folk Museum of Korea and the National Contemporary Museum of Art. In addition to the national and public museums, there are **91 museums funded and operated by colleges and universities and more than 336 private museums** established by private citizens, religious organisations and business enterprises¹¹³. However even if some private museums are very impressive such as the Leeum Samsung Museum of Art, Mrs Kim Hong-hee, Director of the Seoul Museum of Art¹¹⁴ notes that they can be very small and lack professionalism in running their programmes. A large number of museums are not necessarily accompanied by a high-quality cultural offer.

On an **international level**, CHA has been very active in submitting World Heritage, Intangible Cultural Heritage of Humanity and Memory of the World candidates from South Korea to UNESCO for registration on the relevant UNESCO lists, and this has been facilitated by the active engagement of the Korean National Commission for UNESCO (KNCU)¹¹⁵. Among the most recent sites added to the **UNESCO World Cultural Heritage list** in August 2010 are the historical villages of Hahoe and Yangdong, seen as the two most representatives historic clan villages in South Korea.

South Korea's engagement in the protection and **listing of intangible cultural heritage** has been considerable in the past few years: 8 out of the 11 listed were added to the UNESCO international list of Intangible Cultural Heritage of Humanity since 2009. In October 2012 the city of Gangneung held the ICCN Festival with representatives from foreign countries, including from Spain, France, Czech Republic, Hungary and Greece. ICCN is an international organisation consisting of regional governments in all over the world, intending to globalise the city of Gangneung via registration of the Gangneung Danoje to UNESCO, and establishing the secretariat in the city of Gangneung¹¹⁶.

International cooperation agreements: a low number of bilateral agreements with EU

As far as formalised **bilateral exchange** is concerned, EU countries are under-represented with only three bilateral arrangements, agreements and MOU, respectively signed with

¹¹² http://jikimi.cha.go.kr/english/search_plaza_new/Expert_Search.jsp?mc=EN_03_03

¹¹³ Tax deduction for the arts follows the universal tax deduction system of "donating for charitable and non-profit organisation". However, one meaningful revision has been made in 2007 to encourage corporate firms to spend more on the arts through raising the cap for specific business expenses (a discretionary expense for purchasing cultural goods/activities and entertainment goods). This is named 'culture and entertainment expense'. Tax exemption schemes for art products, arts events, publications, and importing goods by cultural organisations related to education, culture, and science activity apply.

¹¹⁴ Met during the World Biennale Forum on 30 October 2012.

¹¹⁵ Refer to the full list at: http://www.unesco.or.kr/eng/front/unesco_kr/unesco_kr_02.asp

¹¹⁶ <http://www.iccnfestival.com/eng/>

organisations based in **France** - Research Centre for the Conservation of Collections (2008), the **United Kingdom** - University of York, Department of Archaeology (2009) and **Hungary** - Hungarian National Museum (2011). A framework agreement for cultural affairs was signed with Italy in 1965 (enacted since 1970) and foresees executive protocols to be signed every two years (the last one was signed in 2007), with no direct impact on everyday cultural activities but ensuring a certain collaboration framework easing cultural cooperation activities¹¹⁷.

A large majority of South Korea's bilateral agreements are with China and Japan, linked by common historical heritage¹¹⁸. CHA highlights the differences between agreements and arrangements: *"The purpose of the arrangements between CHA and foreign agencies is to promote cooperation in the cultural heritage area in general or to facilitate the implementation of a particular program. When the need arises on our side or a foreign partner approaches us for a particular program, we proceed with the signing of an arrangement after analyzing the necessity and effect"*¹¹⁹.

Regarding the agreement with France¹²⁰, a first project is already running following the signature of the arrangement on the preservation of Asian papers. The online database should be enriched with contributions from other Asian countries, depending however on securing funding¹²¹. According to the Director Prof. Bertrand Lavédrine, no new project has been finalised with the National Research Institute of Cultural Heritage (NRICH) but discussions are on-going about collaborations related to conservation science of cultural heritage and sustainable development. Interestingly, except for this partnership, the NRICH has no other EU-related project of exchange (other collaboration projects being with China, Japan and Russia)¹²².

For the National Museum of Korea, one of the turning points for the development of museum at an **international level** in South Korea was the 21st General Assembly of ICOM held in Seoul in October 2004¹²³. It was the first General Conference and Assembly to be held in an Asian country since the foundation of ICOM in 1946. As mentioned on CHA's website, **South Korea has to date signed 12 international conventions, charters and recommendations with UNESCO, ICCROM, ICOMOS and UNIDROIT**¹²⁴.

¹¹⁷ E-mail interview with Mr. Di Vito, cultural attaché at the Istituto Italiano di Cultura in Seoul

¹¹⁸ http://jikimi.cha.go.kr/english/restoration_programs_new/bilateral_cooperation.jsp?mc=EN_06_01

¹¹⁹ Information based on an interview with Minok Kim from the Cultural Heritage Administration on 2 November 2012.

¹²⁰ No information could be obtained by emails for the other organisations in United Kingdom and Hungary.

¹²¹ <http://khartasia-crcc.mnhn.fr/>

¹²² Website on Asian papers: <http://khartasia-crcc.mnhn.fr/>.

Website of the NRICH: <http://www.nricp.go.kr/eng/index.jsp>

¹²³ Email interview with Na-hyun Rim, International department, The National Museum of Korea (29 October 2012)

¹²⁴ http://jikimi.cha.go.kr/english/restoration_programs_new/multilateral_cooperation.jsp?mc=EN_06_02

One of the latest UNESCO nominations for South Korea (under the Creative Cities Network) is **Jeonju** as “City of Gastronomy”, which joins **Icheon** listed as the City of Craft and Folk Arts and **Seoul** as the City of Design¹²⁵.

Beyond the focus on intangible cultural heritage, two topics seem to be important for the South Korean cultural heritage policy:

- The interest and investment in **museum education**. The most recent official document signed in this field (May 2012) is a Framework Arrangement between the CHA and ICCROM regarding Cooperation on the Conservation Education, Training and Research of Cultural Heritage in the Asia-Pacific Region. This education focus is also an important point for the Korea National Commission for UNESCO.
- The **return of cultural heritage and cultural property**. There was in this regard an important return of looted historical royal texts to South Korea by France in May 2011¹²⁶. There are in total an estimated 100,000 Korean cultural properties in the US, Canada and other countries which were looted during the Japanese colonisation and the Korean war. On 16-18 October 2012, the KNCU organised the International Conference of Experts on the Return of Cultural Property, in cooperation with MOFAT, and the CHA. This event ended with an important recommendation on the return of cultural properties not covered by international legal instruments¹²⁷.

At the **Asia-European level**, South Korea has always been a very active member of the **Asia-Europe Museum Network (ASEMUS)**, which now includes museums from 20 European countries and from 19 Asian countries. This network was created in 2000 with the support of the Asia-Europe Foundation¹²⁸ with the first objective to stimulate and facilitate the sharing and use of museum collections. The National Museum of Korea (NMK) has been very active in the field of digitalisation of cultural heritage and presented a case study at the last Asia-Europe Meeting (ASEM) of Culture Ministers in Yogyakarta, Indonesia, in September 2012¹²⁹. It has also taken the lead in Asia for the project of the ASEMUS Virtual Collection of Masterpieces and held the last ASEMUS General Conference on “New and Sustainable Museum Education” in September 2012¹³⁰.

Concerning the PCC and its article 10, the National Museum of Korea (NMK) confirmed its interest in the protection of cultural heritage and the need for peer-to-peer exchange and transfer of know-how. In this respect, NMK was also the host of the First International Conference of International Committee of the Blue Shield (ICBS) where professionals came together to share thoughts on protecting cultural heritage. The presentation by Eladio

¹²⁵ <http://www.unesco.org/new/en/culture/themes/creativity/creative-industries/creative-cities-network/who-are-the-members/>

¹²⁶ http://www.koreatimes.co.kr/www/news/opinion/2011/04/137_85200.html

¹²⁷ http://www.koreatimes.co.kr/www/news/nation/2012/10/117_122550.html

¹²⁸ <http://asemus.museum>

¹²⁹ <http://asemus.museum/news/asem-cmm-cases-studies-for-sustainable-management-of-heritage-cities/>

¹³⁰ <http://asemus.museum/meeting/asemus-executive-meeting-2012/>

Fernández-Galiano, Executive Secretary of EUROPA Major Hazards Agreement, Council of Europe, on “the Impact of Climate Change on Disasters and Built Cultural Heritage: Some European Experiences and Action” gained a lot of attention¹³¹.

2.4. Mobility of artists and cultural professionals: funding organisations and hints for future analysis

Key documents or references (selection)

- **Guide to Funding Opportunities for International Cultural Exchange in Asia - Korea:** <http://culture360.org/asef-news/funding-opportunities-for-international-cultural-exchange-in-asia/>
(see files under Korea, Focus on Asia, and Open to any nationality)
- **The ARTRO:** <http://eng.theartro.kr/>
- **Artists’ residencies in South Korea:** <http://www.transartists.org/map?country=kr&tid=All>
- **Residencies for South Korean artists worldwide:** see above mapping and <http://test.arko.or.kr/english/programs/activ01.jsp>
- **Crafts related events:** Cheongju Craft Biennale: <http://eng.okcj.org>
- **New Media artist related events and venues:**
Seoul Media City Biennale: <http://www.mediacityseoul.kr/>
Nam June Paik Library: <http://www.nhdm.net/nam-june-paik-library2/>
- **Design events:**
Gwangju Design Biennale: <http://www.gwangjubiennale.org/>
Seoul UNESCO City of Design (since 2010):
<http://www.unesco.org/new/en/culture/themes/creativity/creative-industries/creative-cities-network/design/seoul/>

Challenges of mobility statistics

Quantitative data about the mobility of artists and cultural professionals is currently not available within the EU, neither globally nor nationally¹³². In some cases, regional or national cultural observatories make available statistics about performing arts companies subsidised by national or regional funding, however the data are still partial as they only concern publicly-funded organisations.

Given this lack of data from the European side, to date it is definitely very challenging to provide data about cultural mobility between the EU and a third country. Regarding South Korea, as previously seen in particular for the field of the performing arts, KAMS provides some data (at least for the year 2010) but they are specific to one sector and do not fully cover the independent performing arts field. Artist-in-residence programmes and venues in

¹³¹ <http://icom.museum/news/news/article/first-international-conference-of-the-international-committee-of-the-blue-shield-icbs/>

¹³² Except through specific and time-framed EU supported projects such as Travelogue: <http://on-the-move.org/mobilityprojects/article/14403/travelogue-mapping-performing-arts-mobility-in/>

South Korea were contacted in the frame of this study to ask for quantitative information about artists' exchange, but despite some preliminary positive feedback, the data provided are not enough to define mobility flows.

Although, concretely, data about mobility flows are lacking to date, it seems nevertheless pertinent to highlight the key South Korean organisations funding cultural mobility as well as some areas that could be worth examining in a future in-depth study on the mobility of artists and cultural professionals between South Korea and the EU.

Funding organisations for incoming and outgoing mobility

A relevant document for understanding mobility trends between South Korea and the EU is the *Guide to Funding Opportunities for International Cultural Exchange in Asia*, commissioned by the Asia-Europe Foundation and online since September 2012, which provides an exhaustive list of the diverse funding organisations supporting incoming and outgoing mobility to and from South Korea¹³³.

For this Guide, South Korea was the only Asian country to appoint a researcher – through KAMS – to carry out the mapping of funding opportunities in the country. A total of 39 organisations were identified by KAMS¹³⁴, of which 13 support outgoing mobility of South Korean artists (and therefore included in the South Korea funding guide) and 13 supporting the mobility of artists of any nationality, including South Koreans and other Asian countries. **South Korea is among the countries most actively involved in international mobility** (and providing clear information online, in particular for incoming mobility), after Australia and Japan. Performing arts (traditional) and music are the most supported art forms, followed by visual arts. Similarly to Australia, **market development grants and touring incentives for groups** enjoy particular support, but exchange, networking and collaboration are increasingly funded as well.

In terms of **outgoing mobility** (from South Korea to the EU in particular), a leading role is played by governmental funding granted through **KAMS, Arts Council of Korea** and to a lesser extent the National Academy of Arts¹³⁵.

The **Korea Foundation**, under the Ministry of Foreign Affairs of Korea, is also a key player, funding much international cultural exchange. It also hosts a cultural centre in Seoul and provides information about arts and culture in Korea¹³⁶.

¹³³ <http://culture360.org/asef-news/funding-opportunities-for-international-cultural-exchange-in-asia/> (including the file for Korea, Focus on Asia and Open to any nationality)

¹³⁴ Included among other organisations in the Annex 2.

¹³⁵ KAMS has for artists, cultural professionals and companies, 8 types of funding schemes including the *KAMS Connections*, *Center Stage Korea* (both to invite foreign performing arts groups and to send South Koreans in foreign markets or festivals), *Resonance Korea* (for festivals, markets). ARKO has four types of grants, more orientated towards exchange than market development (for residencies, trainings for cultural professionals, etc.)

¹³⁶ <http://culture360.org/asef-news/funding-opportunities-for-international-cultural-exchange-in-asia/>.

Other more limited sources of funding (in terms of the number of supported artists) come from regional bodies (Busan Foundation and Incheon Foundation for Arts and Culture) and mostly private foundations (Korea Traditional Performing Arts Foundation, CJ Cultural Foundation etc.). The Samsung Foundation of Culture funds in particular a Residency programme at the Cité Internationale des Arts in Paris, France.

In terms of **incoming mobility** (from EU and other regions to South Korea), collaborations, projects and residencies are particularly supported. Among all the organisations listed in the *Guide to Funding Opportunities* that support the mobility of Asian nationals, one in five is from South Korea. Particular support is given to specific forms of mobility like **training/research and/or cultural exchange opportunities**, in particular by:

- Korea Foundation for Advanced Studies (International Scholar Exchange Fellowship);
- Korea National University of Arts (K-Arts) (Art Major Asian Scholarship Program);
- Busan International Film Festival (Asian Film Academy);
- Ministry of Culture, Sports and Tourism Korea (Cultural Partnership Initiative)¹³⁷;
- National Museum of Contemporary Art (International Fellowship in Cultural Studies of Contemporary Art).

Cultural mobility between EU and South Korea: art fields and relevant topics

Apart from the cultural sectors tackled by this report (publishing, performing arts, cultural heritage and audio-visual sectors), other cultural sectors could be analysed as they encompass – or potentially include – important mobility flows between South Korea and EU:

- **Visual arts:** South Korea is, together with Japan, the Asian country with the most important number of artist-in-residence programmes, as referenced in the specialised websites of Trans Artists and ResArtis¹³⁸. Contacts have already been established with some of these as part of the research for this paper, and the initial positive feedback is a good sign of the interest of the sector for a better definition of their exchange with Europe. The South Korean government is also investing in new types of cultural spaces built in former factories, which may pave the way to the opening of new artists in residency programme¹³⁹. Finally, projects involving the

The Korea Foundation was not listed under the Korea mobility funding guide because its schemes are usually not based on open calls for applications (one of the criteria to be listed in the mapping).

Korea Foundation: <http://www.kf.or.kr/eng/main/index.asp>

The Korea Foundation has also a Cultural centre:

<http://culture360.org/organisation/korea-foundation-cultural-center/>

¹³⁷ This initiative is to prepare the space for cultural interchange among Asia, Latin America and Africa. Through this initiative cultural fellows – in particular from Asian, Latin American and African countries - can stay in South Korea for a certain period of time to experience Korean culture while introducing their culture. The purpose is to connect the diversity of cultures and to build cultural networks between countries.

¹³⁸ <http://www.transartists.org/map?country=kr&tid=All> and <http://www.resartis.org>

¹³⁹ <http://www.korea.net/NewsFocus/Policies/view?articleId=90614>

mobility of cultural professionals – such as curators – could also be interesting to study, e.g. the international curators' course run by the Gwangju Biennale.

- **New media and mixed media:** Internationally recognised as the “Father of Video Art”, Nam June Paik (Korea, 1932-2006) created a large body of work including video sculptures, installations, performances, videotapes and television productions. An award by the Arts Foundation of North Rhine-Westphalia¹⁴⁰, Germany is named after him as well as a centre with a library in Seoul¹⁴¹. 2013 may be an important year of celebration since this will be the 50th anniversary of his legendary solo exhibition at the Galerie Parnass in Wuppertal, Germany, that featured his television set installations, which radically changed the look and content of television.

The new media art field is very dynamic in South Korea with the Seoul Media City Biennale involving international and European artists. Cutting edge forms by South Korean artists are finally getting a regular international recognition in particular in important European events such as Documenta¹⁴², Venice Biennale¹⁴³, Transmediale¹⁴⁴ and Ars Electronica¹⁴⁵.

- **Crafts:** the Cheongju Craft Biennale started in 1999, and has grown steadily to become an internationally well-known and diverse event. In 2009, 290,000 visitors saw the exhibition, which boasted 3,000 artists from 53 countries exhibiting their works. Earlier invited theme countries were Canada in 2009 and Italy in 2007.
- **Design:** Beyond the Gwangju Design Biennale, Seoul has been nominated UNESCO City of Design since 2010 and hosted in 2011 the International Conference 2011 on “Sustainable Development Based on Creativity” with the network of UNESCO Creative Cities.

There has been an interesting exchange of **data and information** with the Goethe Institut, Seoul on cooperation projects between Germany and South Korea 2005-2012, initiated by the Goethe-Institut. This could provide a model for data collection on cultural mobility by other **national cultural institutes and EU embassies** active in the field of arts and culture in Seoul and South Korea¹⁴⁶.

A future report on mobility flows between South Korea and EU and the creative process it implies could also help understand better the **current situation of alternative spaces** in South Korea and alternative artistic forms in general. For the alternative scene, in particular in the visual arts sector, such spaces were a model in the 1990s in Asia, but their lifetime

¹⁴⁰ <http://www.kunststiftungnrw.de/news.php?nid=291&lang=en>

¹⁴¹ <http://www.njpartcenter.kr/en/research/library.asp>

¹⁴² <http://www.hancinema.net/korea-makes-strong-showing-at-documenta-43823.html>

¹⁴³ http://www.dailymotion.com/video/xjq87o_lee-yong-baek-korean-pavilion-at-venice-biennale-2011_creation

¹⁴⁴ http://www.youtube.com/watch?v=rqX_9MZ09mg

¹⁴⁵ <http://www.aec.at/center/en/2012/08/01/typedrawing/>

¹⁴⁶ Annex 9: Cooperation Projects between Goethe-Institut Korea and South Korea (Visual and Performing Arts)

was particularly limited, as mentioned by the South Korean curator Hyunjin Shin: “*In the late 1990s artists in Korea and artists who studied abroad started to open up alternative art spaces. For the last 10 years, the alternative spaces were considered to be a critical component in the development of contemporary Korean art. (...) An exploding growth of the contemporary art market has been a major element of the changes to take place. (...) Thus the crisis of alternative art spaces can be called as that of alternativeness. This conclusion can be backed up by the changed funding policy of the government, which has been the only funding source to these early alternative spaces*”.¹⁴⁷

Another point to mention in relation with an in-depth analysis of South Korea-EU cultural mobility would be the **comparison between EU and South Korea’s social systems and rules applying to mobile artists and cultural professionals** (in terms of social security regulations, professional status, taxation etc.), which have a particular impact on touring and co-production projects.

Finally a study on mobility flows of artists and cultural professionals could encompass some interesting characteristics of **South Koreans students in arts-related disciplines in Europe**¹⁴⁸: South Korea is the third country worldwide to send students to study abroad (122,299 estimated in 2009 hence an increase of 26.5% compared with 2004, including 18% in the field of arts and humanities). Even if Japan, the USA, Australia and New Zealand remain their most favourite destination, United Kingdom, France, Germany and Austria are also selected venues for study. There seems to be a high potential, which may also explain the recent symposium held by the European League of Institutes of Arts (ELIA) in Seoul in October 2012¹⁴⁹.

¹⁴⁷ <http://www.transartists.org/article/investigating-korean-dutch-independent-art-scene>

¹⁴⁸ <http://www.promodoc.eu/institutions-market/south-korea/student-and-mobility-data>

¹⁴⁹ http://www.elia-artschools.org/Activities/elia-asia?lang_id=2&schools.org/Activities/elia-asia?lang_id=2

3. Special Focus: the Audio-visual Sector in South Korea

As stated above, the financial crisis of 1997 under the presidency of Dae-joong Kim had a great impact on the redefinition of South Korea's cultural policy. According to the cultural policy researcher Kiwon Hong, the adoption of neo-liberal economic reforms demanded by the International Monetary Fund contributed to the commercialisation of the South Korean cultural sector. *"Cultural industry gained a firm status in the cultural policy field (...) This was also a period when cultural products, especially Korean drama became popular throughout the Asian region. Growth of local movie industry market also spurred this atmosphere thereby producing various statistic data that measured the economic impact of cultural industries"*¹⁵⁰.

Before delving in the analysis of European investment in the South Korean audio-visual sector (including **TV, film and animation**) and the challenges and opportunities of co-productions, let us first introduce the main aspects of the audio-visual sector in South Korea both in terms of policies, organisations and audience.

3.1. Key audio-visual organisations and related general public policies

According to the World Trade Organisation (WTO) 2010 statistics¹⁵¹, South Korea ranked eighth in the world in terms of the number of motion pictures produced in 2008. As for the values of exports and imports in 2009, WTO data (2011) shows that the country ranked eighth in both exports (worth US\$ 198 million) and imports (US\$ 321 million). In terms of profit of the South Korean industry, the top three most profitable domains are the publishing, broadcasting and advertisement whereas the animation sector has one of the highest annual increase since 2007¹⁵².

The South Korean government has been reinforcing its strategic support to **creative industries** in order to **improve the competitiveness of the South Korean content industry** and to make it one of the world's top five content powerhouses through:

- Creating new markets;
- The development of diverse contents by utilising South Korea's unique cultural resources that benefit the new environment of media convergence;
- Nurturing core talents that can lead the cultural content industry, development of technologies and create new markets in the converged content field;
- The improvement of intellectual property rights to suit the digital technology advancement and creation of a favourable distribution environment;
- The provision of support for consulting and legal services to promote the export of cultural contents;

¹⁵⁰ Email interview dated 31 October 2012

¹⁵¹ As reported in http://www.adbi.org/files/2012_04_16.wp354.audiovisual.services.korea.pdf

¹⁵² Average annual increase of 15.4%. Annex 10: Status of Annual Profit in South Korea's Content Industry.

- The enhancement of media competitiveness and autonomy.

In the film sector, a key governmental organisation is the **Korean Film Council (KOFIC)**¹⁵³, established in 1973. Its headquarters will move to Busan in 2013¹⁵⁴. Since July 2007, KOFIC has set up and managed the Film Development Fund, approximately US\$ 430 million in total, to promote and support the Korean film industry. The fund is financed by the government with US\$ 172 million, and US\$ 172 million from the box office ticket sale allocation and finally US\$ 86 million from funds carried from previous years. The 3% allocation from ticket sales is temporarily applied between July 2007 until the end of 2014. The Fund's missions are articulated around supporting South Korean film production (including animation), supporting global business and investment in research and infrastructure (including the Korea Academy of Film Art and 3D cinema technology).

South Korea film structure includes as well 10 regional film commissions which assist productions in obtaining film permits, serve as a liaison between production companies and shooting locations, arrange traffic control, human resources hire and provide other miscellaneous assistance. Some film commissions operate equipment rentals, studios and post-production facilities as well¹⁵⁵.

Often compared with the French cinema support system (with in particular the screen quota system¹⁵⁶), KOFIC is regularly cited as a reference particularly in the Asian film industry for having been able to protect and nurture the South Korean film production.

The **broadcasting industry in South Korea**¹⁵⁷ consists of radio and television stations, cable TV stations, satellite TV, digital multimedia broadcasting (DMB), internet protocol TV (IPTV) and programme providers that create content or have acquired the right to broadcast tape-recorded television and radio programmes. After having being under strict governmental control in the 1970s, the repressive Basic Press Law was repealed in 1987, and, since 1990, the television market has expanded significantly. With the Broadcasting Law of 1987, the Korean Broadcasting Committee - now part of the Korea Communications

¹⁵³ <http://www.koreanfilm.or.kr>

¹⁵⁴ In April 2004, the preceding Roh Moo-hyun Government legislated the *Balanced Regional Development Act* in order to develop both capital and countryside together. This Act stipulated that public organisations be relocated in different regions by 2012. This Act has been slightly modified since then; however, it was confirmed that major government offices and organisations will move to the designated locations by 2012. A total of 157 government offices and agencies either have moved or will move to the countryside accordingly. Both Korean Film Council (KOFIC) and Korea Media Rating Board (KMRB) will move to Busan in 2013 (a city that already hosts the Busan International Film Festival and high-tech shooting facilities).

¹⁵⁵ <http://www.koreanfilm.or.kr/jsp/locKorea/filmOrg.jsp>

¹⁵⁶ By guaranteeing a minimum number of days of South Korean films screening, the screen quota system aims to protect South Korean films from the infiltration of foreign films into the South Korean market. South Korea adopted this system in 1967. This system has evolved through the years. The screen quota is stipulated in the 2006 "Ordinance of the Films and Video Contents Advancement Act". According to Article 19 of the ordinance, the executive of a film theatre must screen South Korean films for at least one-fifth of the annual screening days, from January 1 to December 31.

¹⁵⁷ <http://www.adbi.org/files/2012.04.16.wp354.audiovisual.services.korea.pdf>

Commission¹⁵⁸ was established to oversee all broadcasting in the country. The most important feature of this law was that it guaranteed freedom of broadcasting. However, it imposed a **strict quota system** in which television stations allocate at least 10% of their broadcasting hours to news programming, 40% to cultural/educational programming, and 20% to entertainment programming. **From 2013, South Korea will convert from analogue broadcasting to digital broadcasting.**

In May 2009 the **Korea Creative Content Agency (KOCCA)**¹⁵⁹ was established to provide efficient support for the growth of the cultural industries by combining the Korea Broadcasting Institute, the Korea Culture and Content Agency, the Korea Game Industry Agency, the Cultural Contents Center and the Digital Contents Business Group of Korea IT Industry Promotion Agency according to the article 31 of the Framework Act on Cultural Industry Promotion.

3.2. South Korean film distribution system

In terms of structure of film distribution in South Korea, there are three stakeholders involved in the screening process: Producer > Distributor > Cinema. On behalf of the producer, the distributor makes a contract with cinema concerning the terms and conditions of screening. At the end of the year, the distributor suggests “line-up” drafts of films to cinema and request for their “booking” (screening). The films with the best potential are given the first priority in the booking. The beginning of the year, summer holiday season, *Chuseok* holidays¹⁶⁰ and the year-end period are the most popular seasons for screening, and the potential blockbusters are allocated to these peak seasons for screening. In order to secure the screens, the distributor holds a preview for those in charge at the cinemas concerned. After watching the new films, the cinemas select the films for their screening. There are two types of booking – “block booking” and “free booking”. The “block booking” is to screen all the films produced by the contracted partner; the “free booking” consists in screening only the contracted film. While the former is “distributor-centred” type of contract, the latter is a “consumer-centred” type, and it is more common in South Korea.

The films are “one source, multi-use” products. After the cinema screening they are either released in video/DVD, broadcasted on TV, or through online sales. However, **the largest source of profit-making is the revenue from cinema screening, which normally accounts for 70-80% of the total revenue.** Video generates 12-14%, and DVD accounts for only 2-3%. The profit from selling to video is declining, because important conglomerates have closed in this sector. The profit from DVD is also unlikely to increase, since people do

¹⁵⁸ The KCC was created in 2008, combining the former Korean Broadcasting Commission and the Ministry of Information and Communication. It manages broadcasting and communications with full authority, promotes the convergence process between broadcasting and telecommunications, and mitigates government regulations.

¹⁵⁹ <http://eng.kcc.go.kr/user/ehpMain.do>

¹⁵⁹ <http://www.kocca.kr/eng/index.html>

¹⁶⁰ http://english.visitkorea.or.kr/enu/SI/SI_EN_3_6.jsp?cid=811650

not buy but rent DVDs, and even more, they tend to copy illegally. Online sales are likely to grow, however. **One important trend of film distribution in recent years is that producers establish their own distributors and they become vertically integrated.**

The three major companies in production and distribution are¹⁶¹:

Production**	CJ Entertainment & Movie	Lotte Entertainment	ShowBox
Distribution	CGV	Lotte Cinema	Megabox

** Each production and distribution process is vertically integrated.

There is a constant **increase of screens** in South Korea with a more recent investment in 3D technology: the **number of screens** has been multiplied by 2.5 within one decade, reaching a total of **2,081** in 2012. The 3D film *Avatar* by James Cameron became the film with the highest number of admissions sold in South Korean's film history. It attracted a viewing audience of more than 13.4 million in 2009 and 2010.

Cinema Screens by Format in South Korea

	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Total Number	818	977	1,132	1,451	1,648	1,880	1,975	2,004	1,996	2,003	1,974	2,081
-Analogue	N/A	N/A	N/A	1,447	1,602	1,785	1,814	1,836	1,430	870	356	132
-Digital 2D	N/A	N/A	N/A	4	46	95	161	123	437	627	852	1,098
-Digital 3D	N/A	N/A	N/A	0	0	0	0	45	129	506	750	830
-Digital 4D	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	11	16	21

Source: Korean Film Council (2013), *Korean Film Yearbook 2013*, p. 192. [Table last updated: September 2013]

Multiplex cinemas form the majority of screens proposed to the public, the non-multiplex cinema representing only 7,5 % of the total seats in 2010¹⁶².

In terms of ticket box office and profit per admissions, the table below shows a decrease of the audience in 2010 despite a higher profit per admission. *"The discrepancy between increasing box office receipts and decreasing admissions in 2010 resulted from an increase in the average cinema ticket price, which was around US\$ 6 in 2009, but US\$ 7 in 2010. This increase was due to the huge success of James Cameron's three-dimensional (3D) film Avatar. The weekend ticket price for 3D movies is around 14 dollars and the market share of 3D movies in terms of revenue increased from 2.2% in 2009 to 16.5% in 2010"*.

¹⁶¹ Annexes 11 (a): Film market shares in 2012 (distributor)

¹⁶² Annex 12: Multiplex Cinemas in South Korea

South Korean Box Office Receipts and Admissions

		2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Box Office	US\$ (Million)	523.7	623.8	717.1	849.8	898.1	925.7	991.8	979.4	1094.1	1168.4	1235.8	1455.1
	% Change vs. Previous Year	-	20.8	13.3	18.5	5.7	3.1	7.2	-1.2	11.7	6.8	5.8	17.7
Admissions	Numbers (Million)	89.4	105.1	119.5	135.2	145.5	153.4	158.8	150.8	157.0	149.2	159.7	194.9
	% Change vs. Prior	-	17.7	13.6	13.1	7.7	5.4	3.5	-5.0	4.1	-5.0	7.0	22.0

Source: Modified from Korean Film Council (2013) *Korean Film Yearbook 2013*, p. 46 and p. 54

[Table last updated: September 2013]

However, according to the last statistics obtained in September 2013, the admission rate is higher than the previous years thanks to a series of box office hits beginning early 2012. Local films released in the first half such as *Architecture 101*, *Dancing Queen*, *All About Wife*, *Deranged*, and *Nameless Gangster* all drew more than four million viewers each¹⁶³. This result seems to show that the less favoured screen quota (which reduced the number of days that cinemas were obliged to screen South Korean films from 146 days to 106 in 1998 and then to 73 in 2006) is being tackled.

Beyond the South Korean blockbusters, there is an audience sector in South Korea – not dominant but still worthy of notice – which is interested in independent and alternative movies that usually gain more recognition in international film festivals. There is an independent film festival in Seoul¹⁶⁴, running every year and since 2011 the giant multiplex CGV has invested in a “Movie Collage Korean Independent Film Festival”, with the aim of bringing not only films that have been awarded worldwide (like *Choked* by Kim Joog-Hyun which was invited to the Berlin and Miami International Film Festivals) but also to offer a more diverse cinema to the South Korean audience¹⁶⁵.

¹⁶³ <http://www.koreaitimes.com/story/23339/korean-flms-renaissance-box-office-success>

¹⁶⁴ <http://koreanfilm.or.kr/jsp/news/news.jsp?blbdComCd=601006&seq=1669&mode=VIEW>

¹⁶⁵ http://www.koreatimes.co.kr/www/news/art/2012/09/141_106738.html

3.3. South Korean Film Festivals with a European presence / European Film Festivals with a South Korean presence

In the **film** sector, three main reasons may explain the rise of South Korean cinema: an enhanced creativity due to the elimination of government censorship and strong regulations in the 1980s; the **entry of major conglomerates** - known locally as **chaebol** - to the film industry in the 1990s (the pioneer being Samsung); and frequent appearances in prestigious international film festivals including European ones such as Cannes, Venice and Berlin¹⁶⁶. However if some South Korean films gain recognition in international film festivals and can boost the overall film industry of South Korea, their success in terms of admissions in South Korea is far from guaranteed: most of the award winning films being more arthouse type than entertainment.

All the festivals listed below have an international and European component but the Busan International Film Festival remains a key event in the Asian region and in the world since its inception. It includes a recognised film market and an Asian Film Academy to nurture professional skills among young Asian film professionals.

Main film festivals in South Korea

Name	Venue	Year of creation	Time Period	Organiser	Budget
Busan International Film Festival (BIFF)* ¹⁶⁷	Busan, Korea	1996	Early October (around 10 days)	Before 2011, under the Ministry of Culture, Sports, and Tourism	<u>2011</u> 3.5 KRW billion (total spending)
Puchon International Fantastic Film Festival (PiFan) ¹⁶⁸	Puchon, Korea	1997	Mid July (around 11 days)	After 2011, under the Korean Film Council	<u>2012</u> 3.5 KRW billion (for hosting) + KRW 80 million (for evaluation and operation)
Women's Film Festival (WFFIS) ¹⁶⁹	Seoul, Korea	2002	Mid April (around 8 days)		
Jeonju International Film Festival (JIFF) ¹⁷⁰	Jeonju, Korea	2000	Late April (around 9 days)		
Seoul International Youth Film Festival (SIYFF) ¹⁷¹	Seoul, Korea	1999	Late August (around 7 days)		
Jecheon International Music & Film Festival (JIMFF) ¹⁷²	Jecheon, Korea	2005	Mid August (around 7 days)		

Source: KOFIC (2012) "Korean Cinema in the first half of 2012" (in Korean)

¹⁶⁶ <http://culture360.org/magazine/funding-the-korean-film-business/>

¹⁶⁷ <http://www.biff.kr/structure/kor/default.asp>

¹⁶⁸ <http://www.pifan.com/>

¹⁶⁹ http://www.wffis.or.kr/wffis2011/00eng_intro/main.html

¹⁷⁰ <http://eng.jiff.or.kr/>

¹⁷¹ <http://www.siyff.com/intro/intro.asp>

¹⁷² <http://www.jimff.org/kr/index.asp>

In Europe, the main film festivals with a regular South Korean film directors' presence and awards are the **Cannes International Film Festival, the Berlin International Film Festival and the Venice International Film Festival**, and this since the 1960s¹⁷³.

The award of best film director to Kwon-taek Im's *Chihwaseon* at the Cannes Film Festival in 2002 opened the path to a series of other internationally recognised top awards, such as *Oasis* (Best Director at Venice, 2002), *Samaritan Girl* (Best Director at Berlin, 2004), *Oldboy* (Grand Prix at Cannes, 2004), *3-Iron* (Best Director at Venice, 2004), and *Secret Sunshine* (Best Actress at Cannes, 2007). The last award for 2012 is the Golden Lion for the Film *Pieta* by Ki-duk Kim at the 2012 Venice International Film Festival.

As part of their **diplomatic ties** with South Korea, EU member countries also engage in organising joined film screenings. A recent example is Ireland through the Jameson Dublin International Film Festival (JDIFF), as Ireland and South Korea will celebrate their anniversary of diplomatic relations in 2013¹⁷⁴. South Korean movies are also regularly screened in some **Asian Film Festivals in EU countries**, such as the Udine Film Festival (Italy), the Deauville Asian Film Festival and the Trois Continents Film Festival (France). Finally KOFIC supports and partners with European Film Festivals market and training programme such as for the Rotterdam International Film Festival and the Rotterdam Lab which is a training platform for emerging film professionals (including South Korean ones)¹⁷⁵.

Animation Film Festivals: Three main festivals or events can be highlighted, all being initiated after 1995: the **Seoul International Cartoon and Animation Festival** (1995), the **Puchon International Student Animation Festival** (1999) and the **International Animation Day event** (2002)¹⁷⁶.

South Korea has been represented in most of the key animation festivals or events in Europe, mostly in France (Annecy and Bègles), the United Kingdom (London and Norwich) and the Czech Republic (Prague).

In terms of South Korean presence in markets in Europe, only the two events in the table below in Cannes, France could be identified.

¹⁷³ Annex 13: Main Film Festivals in the EU with a South Korean presence

¹⁷⁴ <http://www.korea.net/NewsFocus/People/view?articleId=100158>

¹⁷⁵ http://www.filmfestivalrotterdam.com/professionals/cinemine/rotterdam_lab/

¹⁷⁶ Annex 14: Animation Film Festivals in South Korea and the EU

Name of the events (National Budget)	2012 (1 billion KRW)		2011 (850 million KRW)		2010 (650 million KRW)	
	Total consulted amount	Total contract amount	Total consulted amount	Total contract amount	Total consulted amount	Total contract amount
MIPTV	US\$ 124,890,000	US\$ 11,200,000	US\$ 12,070,000	US\$ 5,520,000	US\$ 115,110,000	US\$ 23,020,000
MIPCOM&MIPJU NIOR			US\$ 3,189,990,000	US\$ 25,980,000	US\$ 290,070,000	US\$ 3,900,000

Source: Internal document of the Ministry of Culture, Sports and Tourism

One important advance seems to have been made in 2009 when South Korean content got the green light in Europe at MIPCOM 2009¹⁷⁷, with deals concluded among others with German and Spanish broadcasting companies, in particular for documentaries. More than 30 South Korean professionals attended this event.

3.4. Recent trends of the South Korean local film production

Number of Films Produced, Imported, and Released by Year

		2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Korean films	Films produced	80	82	87	110	124	113	158	152	216	-
	Films released	65	74	83	108	112	108	118	140	150	101
Foreign films	Films imported	271	285	253	289	404	360	611	381	551	-
	Films released	175	194	215	237	280	272	243	286	289	239
Total No. of films released		240	268	298	345	392	380	361	426	439	340

* The number of productions is based on the numbers of classification of the Korea Media Rating Board excluding short films (less than 40 minutes of running time) in accordance with laws on films and video productions.

** The number of film released includes only the film premieres, not the films of the prior year or re-released films.

Sources: Adapted from ABDI Working Paper 354 (2012: 6) and an internal source from the Ministry of Culture, Sports and Tourism, South Korea.

¹⁷⁷ <http://www.onscreenasia.com/article/korean-content-gets-green-light-in-europe/6221>

A local film production still relatively strong...

In terms of **admissions and market share of international films in the South Korean market**¹⁷⁸, 2012 is expected to be a very good year for the South Korean film market (**53.90%**). According to the Korean Film Council, **South Korean films' share climbed to 51.9% for the whole of 2011, the first time the figure reached 50% since hitting 49.9% in 2007**. However, the figure dropped to 42.8% in 2008, climbed to 48.7% in 2009 and declined again to 46.6% in 2010.

This leaves South Korea as one of the unique countries in the world which has a higher local market share than for the Hollywood blockbusters that however still dominate the film imports. US share stands for this year at 40.30% while Europe is at 3.70 % of the market shares by admission. One should note that this share is higher than the 2011 figures for Europe when it was just 1.9% of the share by admissions¹⁷⁹.

... but a need to reach foreign markets

Despite these overall good statistics, South Korean film production has been through a crisis since 2005 because of the saturation of the South Korean domestic market and a decrease of film exports that had previously benefited from the Korean awards at European and international film festivals and from the *Hallyu* wave¹⁸⁰. After reaching its peak in 2007, the total investment in South Korean films has decreased amidst a worsening of profitability. The average production cost per film also decreased from KRW 4 billion during the mid 2000s to KRW 2.2 billion in 2010.

Among the recommendations to the South Korean film industry and overall support policies, those articulated by the Korea Institute for Industrial Economics and Trade¹⁸¹ are: the modernisation of available infrastructures (like 3D shooting places in South Korea), the strengthening of ground-breaking copyright protection measures, the securing of the steady flow of financial resources needed to promote South Korean films (while expanding the Film Development Fund), and **the incentives to foreign film producers to work with South Korea, allowing South Korean films to gain a foothold in foreign markets**.

3.5. Foreign investment in South Korea, including in particular investment from EU countries

¹⁷⁸ See Annex 11 (b): Admissions and market share of international films in the South Korean market (2012)

¹⁷⁹ Statistics January-November 2011 in the ABDI working paper,

page 9: <http://www.adbi.org/files/2012.04.16.wp354.audiovisual.services.korea.pdf>

¹⁸⁰ Annex 13: Main Film Festivals in the EU with a South Korean presence

¹⁸¹ http://eng.kiet.re.kr/kiet_eng/?sub_num=213&state=view&idx=7952

The Ministry of Knowledge Economy (MKE) has controlled the statistical data on Foreign Direct Investment (FDI) in various sectors since 2005. The status of FDI in culture and broadcasting industry for recent years can be represented in the following table.

Trends of Foreign Direct Investment in Culture & Broadcasting Industry

(Unit: US\$ 1,000)

	2008		2009		2010		2011		2012		2013 (Q2)	
	No. of Reported* Cases	Reported Amount	No. of Reported* Cases	Reported Amount	No. of Reported* Cases	Reported Amount	No. of Reported* Cases	Reported Amount	No. of Reported* Cases	Reported Amount	No. of Reported* Cases	Reported Amount
America	22	23,072	11	42,650	11	17,466	9	100,120	12	9,197	8	23,579
Asia	7	2,052	10	5,445	16	10,467	10	42,332	8	4,628	2	206
Europe	EU	2	4,509	1	46	1	431	3	14,864	-	-	-
	Non-EU	-	-	-	-	-	-	-	-	-	-	-
Middle East	-	-	-	-	-	-	-	-	-	-	-	-
Africa	-	-	-	-	-	-	-	-	2	274	-	-
Total	31	29,633	22	48,141	28	28,364	22	157,316	15	11,026	10	23,785

Source: Statistical Data from the former Ministry of Knowledge Economy (2012) and the new Ministry of Trade, Industry and Energy (MOTIE, 2013) (<http://www.motie.go.kr/motie/in/it/investstats/investstats.jsp>) [Table last updated: September 2013]

* As reported by the film industry to the Ministry.

The MKE classified the Culture & Broadcasting industry based on the Korea Standard Industry Classification (KSIC). This includes seven sectors: “film & video production”, “animation & video production”, “advertising film & video production”, “service on film & video production”, “film distribution”, “skywave distribution”, “performance” and “others.” The data in the table above reflects the total number of FDI in these sub-fields.

Looking at the overall FDI trends between 2010 and 2012, there is a serious regional disparity. The largest amount originates from the USA, followed by Asia. The total volume of FDI from these regions represents 98% in 2010 and 91% in 2011. The investment from the EU has remained marginal. As for the European investors, Hungary invested in 2010, the Netherlands (two cases) and Hungary (one case) in 2011¹⁸².

The following data show the capital investment of foreign companies in South Korean cable companies.

Inward Foreign Direct Investment (FDI) in Broadcasting Service Providers (As of 31 December 2011)

Type of Broadcasting	Source Economy	Year of Investment	Number of Recipient Companies	FDI (unit: KRW 1,000)
System Operator	Malta	2005	1	32,709,000
	Netherlands	2005	1	16,704,000
	Europe*	N/A	2	8,873
	US	2005, 2006, 2010, etc. (other cases not identified)	4	160,228,075
Satellite TV	US (and others)	N/A	1	10,725,770
Program Provider	Japan	2001, 2006, 2007, 2011	6	45,430,000
	US	2004, 2006, 2010, 2011	8	84,087,000
	Canada	2011	1	2,000
	Singapore	2010, 2011	2	9,719,000
	Switzerland	2010	1	950,000
	Norway	N/A	2	25,078,000
	Luxembourg	N/A	1	416,000
DP	Arab Emirates	2004	1	645,000
	Japan	2006	1	\$1,590,000
IP TV	South America	2006	1	20,047
	Others	N/A	1	40,712,365 shares

Source: Modified from Korea Communications Commission (2012) “2012 nyun bangsongsaneop syltaejosa bogoseo [2012 Report on Korean Broadcasting Industry] pp. 300-303. [Table last updated: September 2013]

¹⁸² For the detailed breakdown of FDI from EU countries, see Annex 15.

Foreign investors were not very active in investing in South Korean broadcasting service providers. As of 31 December 2010, the total volume of FDI was around US\$ 412 million. The largest share went to system operators by taking up to 77%. Besides, the largest investor was USA, followed by Malta¹⁸³. However, it is noticeable that programme providers started to attract more investment in recent years.

Yeongkwan Song, in his abovementioned recent working series document *Audio-visual Services in Korea: Market Development and Policies* for the ADB Institute¹⁸⁴ explained that this foreign investment in the South Korean broadcasting sector could be higher if the Government created a favourable context for a larger investment (in terms of rules related to broadcasting quotas, regulations on ownership, nationality requirements etc.): *“Korea’s broadcasting sector needs more efficient regulations that balance public interest, including the development of domestic content and cultural diversity with the industrial aspects of this sector. (...) It has been mired in heavy government regulations of which the objectives seem unclear. It is hard to find for example the rationale behind the strict limitation of foreign participation in the field of news reporting and multi-genre programming. (...) Since the business of content production is inherently risky, the government should rather encourage substantial capital investment in this sector, including foreign capital”*. This would allow also not to rely mostly on one region (Asia) and one predominant specific genre, the TV Korean dramas.

Status of the investment in South Korea by countries (EU and non-EU countries)

Year	Title	Producer	Investing Country	Amount of Investment (US\$)
2008	<i>Power Quantum Man</i>		France	NA
	<i>My Giant Friends</i>		France	NA
	<i>Backkom</i>		Spain	NA
2009	<i>Robotarpo</i>		Italy	NA
2010	<i>NutJob</i>	Redrover	Canada	9.6 billion
	<i>Scan2Go</i>	SBS contents hub	Japan	7 billion
	<i>TT Pang Pang Rescue</i>	VIX Creative	China	1.2 billion
	<i>Tao - Little Wizard: The 2nd Term at the School of Wizards</i>	G&G Entertainment	China	0.8 billion
	<i>Pororo’s Ice Racing</i>	OCON	China	2.2 billion

¹⁸³ No particular information could be found on the Malta case of foreign investment.

¹⁸⁴ <http://www.adbi.org/files/2012.04.16.wp354.audiovisual.services.korea.pdf>

2011	<i>008Backkom: The Truth about Whit</i>	Rg Animation Studios	China	2.6 billion
2012	<i>Ted and Dory</i>	Sunwoo Entertainment	France	7 billion
	<i>Me and my robot</i>	Synergy media	France	1.9 million

Source: Internal Source from the Ministry of Culture, Sports and Tourism and French embassy/CNC, France

According to an interview with the French audio-visual attaché in Seoul, Daniel Kapelian¹⁸⁵ and information then provided by the Centre National de la Cinématographie (CNC), there was another investment on another French TV animation based on a South Korean one: *Oscar & Co.* (78 animations X 7 minutes)¹⁸⁶.

3.6. South Korea's audio-visual exports: a good potential for the animation sector

Quoting Yeongkwan Song in his working paper: “Exports of Korean motion pictures experienced turbulent fluctuations in the 2000s. They reached a peak in 2005 with exports valued at US\$ 76 million, but, since then, dropped suddenly and only amounted to US\$ 13.5 million in 2010. The main cause of this fall in 2006 was a steep decrease in Korean movie exports to Japan (...). The proportion of the total exports that went to Asia decreased by 72.4% in 2009 to 49.4% in 2010. Meanwhile, exports to Europe rose from US\$ 2.3 million in 2009 to US\$ 4.5 million in 2010”¹⁸⁷.

If we have a closer look at the last available data for **film** exports in 2010 and 2011¹⁸⁸, Asia still comes first with 56.94% of the total exports. Europe comes second before the USA but has lost some share with 22.23% of the total export compared with 33,26% in 2010.

In the **animation industry** export¹⁸⁹, one can see a real potential also in line with the Protocol of Cultural Cooperation, already anticipated by the sector. The statistics below illustrate the growth of exports of South Korean animations to the EU but also the potential for business deals.

¹⁸⁵ Phone interview dated 25 October 2012 and email interview (including information from the Centre National de la Cinématographie-CNC dated 6 November 2012).

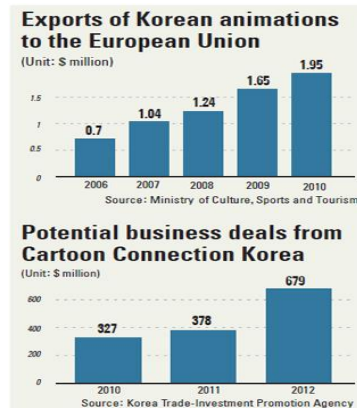
¹⁸⁶ *Oscar & Co.* was launched on French channels Canal+ and Canal+ Family in September 2010 and is diffused through the French private TV channel TF1 since late summer 2011. The animation is distributed internationally by Cake entertainment; *Oscar & Co.* is now sold in 100 countries across Asia, Latin America, North America and Europe.

¹⁸⁷ Annex 16 (a): Exports of South Korean Motion Pictures.

<http://www.adbi.org/files/2012.04.16.wp354.audiovisual.services.korea.pdf>

¹⁸⁸ Annex 16 (b), (c) and (d): South Korea's audio-visual exports: Film industry

¹⁸⁹ Annex 16 (e): South Korea's audio-visual exports: Animations



Source: <http://koreajoongangdaily.joinsmsn.com/news/article/Article.aspx?aid=2950877>

Article 6 (d) of the Protocol on Cultural Cooperation on the minimum respective financial contributions to a co-produced animation work (35%) opens greater opportunities for South Korean animations to penetrate the European market, knowing that the EU imposes a 50% screen quota for animations that are considered to be locally produced.

In this regard, the European Association of Animation Film (CARTOON) held for the third consecutive year in Busan with the Korean company Kotra the event “Cartoon Connection Korea”, with more than 100 European, Korean and Asian companies¹⁹⁰. According to an internal report sent by CARTOON, despite a strong governmental support to South Korean animation since 1994, “many studios have no production orders and about half of Korea’s 20,000 animators are idle during this transition period from overseas to domestic production; feature-length animation films have been unsuccessful at the box office, generally not attracting adult audiences; and Korean animation, though superior in technology, lacks good storytelling, is inexperienced in marketing techniques, and still seeks a uniquely Korean style”. Hence the idea with CARTOON Connection Korea to create professional relationships between European animation professionals and their counterparts from South Korea with a view to developing common projects and ultimately increase the production and distribution of animation works through pitching sessions at the Cartoon Forum (for TV series) and the Cartoon Movie (for animated films). The Project advancement is already very promising with at least 11 projects in discussion¹⁹¹.

With regard to South Korean **TV series** (Korean dramas)¹⁹², Asia as a destination ranks far beyond the USA, Europe (including Russia) despite a decrease of 23% between 2010 and 2011. However, recently Korean TV dramas and soap operas have started to charm the rest of the world including Latin America and Europe (France, Hungary¹⁹³, Romania, Bulgaria, Belgium and Spain). The rights of the extremely popular TV series *Iris* (partly shot in

¹⁹⁰ http://www.cartoon-media.eu/CONNECT/con_programme.php?id=7

List of participants: http://www.cartoon-media.eu/CONNECT/con_listof.php?id=7

¹⁹¹ Report sent to the researchers on 7 November 2012. Annex 17 : List of potential animation co-productions (including with South Korea and Malaysia)

¹⁹² Annex 16 (f): Exports of South Korean TV Dramas

¹⁹³ <http://www.hancinema.net/1st-korean-drama-on-europe-s-terrestrial-tv-12044.html>

Hungary) were acquired by the company *DoubleV*, *Boys over Flowers* was distributed in France, Mexico, Peru and Argentina and *Dae Jang Guem* was acquired by Romania and Bangladesh¹⁹⁴. However this remains still minimal in Europe, also for a matter of cultural affinity: the success of Korean dramas is linked to family, relationships stories and historical epics which remain more attractive for an Asian audience.

Concerning the export of **Korean TV programmes**, there seems to be a strong incentive in particular from KOCCA to export formats (branding, premise, and concept of TV programmes that are then licensed and sold by television networks), rather than contents in order to enter better the international markets. This was the rationale behind the “Global Format Forum” organised by KOCCA in Seoul in June 2012, with South Korean broadcasters and UK and USA experts on TV format industry¹⁹⁵.

3.7. Audio-visual co-productions

Since 2005, 60 films were co-produced between South Korea and non-EU countries¹⁹⁶. In the last five years, however, no film has been co-produced with any EU country apart from France. The last co-production with an EU country was in 2006: *Daisy*, by Lau Wai Keung (Chinese director), a South-Korea-Hong Kong-the Netherlands co-production shot in the Netherlands.

Four co-production agreements with South Korea including one with one EU country could be identified:

- Television Co-production between Korea and Canada¹⁹⁷ - 1995

This agreement is based on the Memorandum of Understanding between the Government of the Republic of Korea and the Government of Canada on Cultural Cooperation, which was signed in 1990. According to this agreement, “the proportion of respective contributions of the co-producers of the two countries may vary from 30% to 70%” (Art. III.1). No particular information was found on the Television co-production agreement implementation (which stipulates that its validity might be of five years), except one co-production in 2008 but with the support of the Seoul Film Commission¹⁹⁸.

- Agreement between South Korea and France concerning film co-productions - 2006¹⁹⁹

¹⁹⁴ <http://www.inaglobal.fr/television/article/les-dramas-moteur-du-soft-power-coreen>

¹⁹⁵ http://www.koreatimes.co.kr/www/news/tech/2012/09/133_119278.html. See also Annex 16 (g): Korea's Export of Broadcasting Contents by Country and region.

¹⁹⁶ Annex 18: List of films co-produced with South Korea since 2005

¹⁹⁷ The official document can be found at <http://www.telefilm.ca/document/en/04/traites/korea.pdf>

¹⁹⁸ <http://www.hancinema.net/canada-korea-joint-production-9663.html>

¹⁹⁹ http://www.cnc.fr/web/fr/textes-juridiques?p_p_auth=oNk7X7zn&p_p_id=listeeditoriaux_WAR_listeeditoriauxportlet&p_p_lifecycle=0&p_p_state=normal&p_p_mode=view&listeeditoriaux_WAR_listeeditoriauxportlet_idArticle=37983

After acceptance by KOFIC and the Centre National de la Cinématographie (CNC), two co-productions have benefited from the film co-production agreement (*La rivière Tumen* and *Une vie toute neuve*). The two others are co-productions but outside the official agreement²⁰⁰:

Film	Nationality	Turnover Korea	Turnover France	Production	Distribution
<i>La rivière Tumen</i> (2009) by Zhang Lu Launch in Korea: 2011 Launch in France: 2010	South Korea, China, France Shot in China	Box office: 2,270 tickets Screens: 16 Income: 16,245,600 KRW (source: KOFIC)	n.a.	Lu Film, Arizona Films, arte France	Distribution in Korea: INDIESTORY Inc. Distribution abroad: Lu Film
<i>Une vie toute neuve</i> (2009) by Ounie Lecomte Launch in Korea: 2009 Launch in France: 2010	South Korea, France Shot in South Korea	Box office: 17,399 tickets Income: 127,325,859 KRW Screens: 59 (source: KOFIC)	Box office: 60,846 tickets (source: Allocine)	Production Now Film (South Korea) Gloria Films	Distribution in Korea: JINJIN Pictures Distribution abroad: FINECUT (Korea) French distributor: Diaphana Films
<i>Nuit et Jour</i> (2008)	South Korea, France	n.a.	n.a.	Bom Film production (Corée du sud), Key Stone Pictures (France)	n.a.
<i>Hyazgar</i> (2007)	South Korea, France, Mongolia	n.a.	n.a.	G21M Arizona Film Jij production (Mongolia)	n.a.

Beyond the four projects followed by the CNC²⁰¹, one can mention three other co-production projects being developed and followed by the audio-visual attaché: *The Bluebeard Castle* by

²⁰⁰ E-mail interview with Daniel Kapelian with information provided by the CNC, dated 6 November 2012.

²⁰¹ Information on the four film projects available in French at: <http://www.cnc.fr/web/fr/ateliers-de-coproduction/-/liste/18/1246648;jsessionid=22BE3956A4ED53B62398FF2224192BD3.liferay>

Dahci Ma (Coproductio Blue Light- Wild Bunch – Lotte Cinema; writing phase / shooting: 2013), *The Killing Room* (Co-production French Connection – Showbox; writing phase / shooting: 2013), *Secret Of My North Korean Father* by Jero Yun (Zorba Production; negotiations on-going for a South Korean co-producer).

- Broadcasting agreement between Korea and Singapore²⁰² - 2007

One official co-production, *Raiders of the Sulu Sea*, followed this agreement. This is an HDTV documentary between South Korea's JoongAng Broadcasting Corporation and Singapore production house Oak3, which was picked up by Q Channel for South Korea and The History Channel for Asia in 2008.

- Agreement between Korea and New Zealand concerning film co-productions - 2008²⁰³

Mrs Mladen Ivancic, Deputy Chief Executive, New Zealand Film Commission confirmed that as of today no official film co-productions between the two countries have been made. However there are some projects in development and it is possible that the first film co-production between the two countries will go into production in 2013²⁰⁴.

3.8. Benefits and conditions of co-production agreements: the French example

Considering the limited co-production agreements, information related to their benefits and conditions was difficult to identify. However we may focus on the French example since this is so far the only EU country having signed a film cooperation agreement with South Korea.

The benefits are mostly the **tax incentives, the funding mechanisms and the opportunities offered for distribution in Europe and third countries like China**. This is in particularly enhanced by the fact that as previously mentioned, South Korean distributors start to invest more importantly at the stage of production of films, also to develop a strategy going beyond their national market. As reported by the CNC, “*a South Korean -initiated film which is co-produced with France within the co-production agreement becomes European, and as such can benefit from the advantages foreseen for European works. The main benefit is the access to pre-buying and buying by TV channels having obligations as regards the diffusion of European works (TVSF directive)*”.

²⁰² Both countries have signed numerous agreements of cooperation:

<http://www.mda.gov.sg/NEWSANDEVENTS/PRESSRELEASE/2008/Pages/10122008.aspx>

²⁰³ <http://www.koreanfilm.or.kr/jsp/coProduction/treaties.jsp?pageIndex=1&blbdComCd=601101&seq=2&mode=VIEW&returnUrl=>

²⁰⁴ However in 2005 there was the release of the film *Antartic* by Im Pil-sung, shot in Queenstown, New Zealand (information provided by Brian Yecies who forwarded to the researchers the text “Digital intermediary: Korean transnational cinema”, November 2011). This film was part of a first diplomatic agreement related to film (2003) between South Korea and New Zealand.

One of the challenges for co-production is the **content**. In this regard, it seems important for the French side to consider the success of this agreement not only from an economic point of view. The **artistic quality and creativity** shall be supported as the very dynamics of this agreement in order for the films to meet their audience, a critical feedback and a good positioning in festivals both in France and South Korea. However as previously mentioned, South Korea invests very much in “contents” but often more as part of a “cultural branding” strategy, for instance in line with the success of the *hallyu* wave. A common line of understanding on the contents shall be of course met for the co-production deal to happen. This is all the more challenging since usually South Korean films being awarded as part of international film festivals are very rarely a success at the South Korean box offices.

One important element allowing film co-productions to happen is to organise **opportunities for encounters** between film producers. CNC and KOFIC cooperate throughout the year to identify the projects to co-produce and follow them, proposing some of them to participate in professional workshops. The two institutions also collaborate within important professional markets, in France and South Korea, by meeting the project leaders and explaining to them the advantages of co-productions. This was for instance the aim of the meeting organised in November 2011 by the CNC in partnership with KOFIC to introduce four South Korean film projects to French film professionals²⁰⁵.

At a European level, the initiative European Audio-visual Entrepreneurs - EAVE (Ties That Bind) supported by the Media Mundus Programme is an interesting model while allowing ten film producers from Europe and Asia (including South Korea) to get insight into audio-visual market and operating conditions, legal frameworks, financing, sales, distribution and exhibition practices in Asia and Europe. The first workshop was held in May 2012 in Udine (Italy) during the Udine Far East Film Festival, while the second was held in Busan International Film Festival 2012²⁰⁶.

3.9. The limitations of film co-production agreements

There can be a link between a co-production agreement, film co-production and the distribution of films, where strategies towards audience development have been nurtured over the years. Taking the French example, France has already been present in South Korea through its embassy and an audiovisual attaché, Institut Français and the support of not only a French Film Festival in Seoul and in South Korean cities but also through the participation of French films/professionals in several key South Korean film festivals. In 2011, over 160 French films were screened in South Korean cinemas, festivals, the Cinémathèque and the Ciné Club of the French Institute. In 2012, around 30 films are being screened in cinemas and are expected to register over 6 million tickets, thus positioning France in 3rd position for foreign films after the USA and Japan. In that sense, the film co-

²⁰⁵ <http://www.cnc.fr/web/fr/ateliers-de-coproduction/-/liste/18/1246648;jsessionid=22BE3956A4ED53B62398FF2224192BD3.liferay>

²⁰⁶ <http://eave.org/programmes/ties-that-bind-2012/>

production agreement happened and has been evolving since then in a context in which South Koreans have been quite familiar with French film content.

The 2006 agreement is generating its first results now, with new projects emerging. For Daniel Kapelian, *“Both France and South Korea have a living cinema: they produce and they fill their cinemas with national productions. We have quite similar systems of protection and support. In addition, we both have a cinema d'auteur, which, in parallel to mainstream productions, ensures recognition and creativity through festivals and international audiences. South Korea is a country that is culturally blooming and in spite of the prominent role of American films, due to its geopolitical situation, the appetite for European and French film is getting stronger. The films which will benefit from the co-production agreement will increase this reciprocal effect of market penetration”*.

However one final point to emphasise is that, in general, there are more collaboration/co-production projects outside the official treaties and agreements. As mentioned by Brian Yecies in his 2009 article “What the boomerang misses: pursuing international film co-production treaties and strategies”²⁰⁷: *“For some producers ICPT (International Co-production Treaties) are unproductive and impractical for four reasons: 1) they are too complex - there two sets of rules, two sets of bureaucracies and two sets of crews – often speaking different languages; 2) they remain out of synch with other incentives available in one’s own country; 3) they can cost more because of complex legal agreements; and finally 4) on a smaller note, vastly different time zones can make communication difficult”*. The recommendation of the sector is often to ease the administration process beyond the need of encouraging more platforms of exchange, as mentioned above.

In terms of distribution, one of the important points of the Protocol on Cultural Cooperation to highlight is article 6 (f): *“Participation of producers from third countries that have ratified the UNESCO Convention in a co-produced audio-visual work is accepted to a maximum of 20%, where possible, of the total production costs and/or the technical and artistic contribution to the audio-visual work”*.

This article implies that China can be one of the producers, which of course can have a huge impact on the distribution of the co-produced work. This point is particularly important considering the numerous collaborative projects that have been implemented between South Korea and China during the last decade. As mentioned in the article quoted above on “Digital intermediary: Korean transnational cinema”, despite the fact that 23 co-productions between China and South Korea were reported by KOFIC involving both countries between 2005 and September 2011, *“In 2011 alone, the Beijing-based Korean digital intermediate (DI) company LOLLOL Media will have worked on 25 Chinese feature films. As well as providing digital technical and file-based workflow consulting, the Korean staff at LOLLOL Media are known for their expertise in DI, 2D and 3D IMAX digital cinematography*

²⁰⁷ The web-link being too long, it is recommended to “google” the title and name of this Professor to find the article online.

processing and distribution". South Korea has very much invested and is nowadays very recognised in the field of diffusion and adoption of digital production as well as the distribution and exhibition technologies and practices: "*The high production values of Korean cinema can be traced directly to the advanced level of visual effects technology and infrastructure exemplified in the work of the Korean firms Macrograph, Digital Tetra (DTI), Footage, HFR and MOFAC*". Such collaborations often go beyond official channels but can be facilitated by organisations such as KOFIC and KOCCA via their respective offices in Beijing (KOFIC regularly workshops for Chinese and South Korean film professionals).

As Brian Yecies mentioned in an email interview²⁰⁸, "*there is obviously a big opportunity for co-productions at a triple level (Korea/China and one EU country) to maximise the distribution market. But this is easier said than done, given other variables for and limitation of the success and the audience appeal, release dates, story, etc. And (..) cultural diversity expressed on screen in official co-productions, that is, cultural representations from each partner country, don't necessarily lead to audience approval and enjoyment by default*".

²⁰⁸ Email interview on 25 October 2012

4. Conclusions and Recommendations

The information gathered for this report shows South Korea's considerable achievements, in particular since the last decade, through the positioning of its cultural and creative industries in terms of export of cultural content, support to international exchange in different fields of arts and culture and the parallel increase of organisations dedicated to data and research. This gives South Korea an increasingly prominent role at a regional (East Asia) and international level, and makes this country an important and relevant partner for the EU.

Five important aspects can be highlighted to define South Korea's policies for culture and cultural industries that can echo some of the main current EU cultural orientations and strategies:

- South Korea has developed a **marketing and more commercial approach** for its **cultural and creative industries** due to the Asian economic crisis of 1997. It has adapted its strategies towards cultural **contents** and its potential for exports and set up different institutions for policy recommendations in this field. This orientation is complemented with a strong focus on **preserving and promoting its own traditional cultural heritage** (including its cinema industry which is still very strong) and on a social approach to culture, for instance fostering access to culture for all.
- **South Korea focuses on Asia, and more specifically on East-Asia** with a triangle relationship with **Japan and China**. East Asia remains the main region for exports and partnerships for all sectors, from publishing to cultural heritage and audio-visual, in particular with the Korean TV dramas - despite some recent anti-*hallyu* demonstrations. **South Korea is also, with Japan, the only Asian country to support the mobility of artists and cultural professionals in the East-Asian region with special dedicated funding schemes.**
- Beyond this regional approach, **South Korea is very invested in multi-lateral and international agreements**, including the landmark ratification of the UNESCO *Convention on the Diversity of Cultural Expressions* (2005). Since less than a decade South Korea has entered a period of frenzy, by signing agreements (in particular in the field of cultural heritage and performing arts), membership of international and European networks and in general has been positioning itself in important international platforms to gain a higher recognition in the cultural and cultural industries' field.
- South Korea has strengthened its **national cultural branding, with a particular focus on cities**. Internationally famous events for all the sectors encompassed by this report take place in South Korean cities, such as the Busan International Film Festival, the Performing Arts Market Seoul, the Gwangju Biennale, the Seoul International Book fair etc. Three cities (Seoul, Icheon and Jeonju) are under the UNESCO Creative City label, and beside this, various cities are branded as art-related cities in order to counterbalance the central role of Seoul: Paju as the book

city, Gwangju as the arts and culture city and Busan as the cinema city. All these cities have very modern and high-tech facilities and aim to position themselves as a reference for Asian culture (like the Asian Arts Theatre in Gwangju).

- Some topics are transversal to most of the cultural and audio-visual sectors covered: **youth** (children books, TV dramas, Korean pop, animation), **education** (education books, museum education emphasis, education overseas for South Korean students) and **digital/new technologies** (in all sectors from the Seoul National Digital Library to the expertise of South Korean companies in digital film processing and distribution).

As far as the cultural and audio-visual sectors are concerned for the scope of this report, the EU is present in terms of venues for partnerships or import/export of cultural contents, in particular with European countries such as the United Kingdom, France, Germany, Italy, Spain, Czech Republic or Hungary.

The exchange is particularly visible in the performing arts sector, as highlighted in the 2010 KAMS report on international cultural exchange. However the types of cultural forms imported and exported lack diversity both in terms of contents (music – and usually classical music for the imports - is the favourite form) and in terms of destinations (exports in particular do not reflect the diversity of the EU cultural context). The co-productions or collaboration projects still lack long-term perspective and consistency.

In all other sectors (publishing, cultural heritage and audio-visual), European countries are not the priority either in terms of import/export or in terms of collaboration/co-productions, despite the potential they may encompass.

South Korean's book exports are still much targeted to China and Japan with a strong focus on **children books**. In terms of translation, European languages (but English) lag behind Japanese and American despite the active involvement of the Literature Translate Institute of Korea and the action of some European countries. One sector that has much potential for development is the **e-book business**, in which the Korea Electronic Publishing Association and the Ministry of Culture, Sports and Tourism have been investing very much since 2010.

Most of the agreements related to **cultural heritage are with China and Japan**, as understandable given the historical links between the three countries. The EU instead is under-represented with only four agreements or arrangements with France, United Kingdom, Hungary and Italy. Beyond these official agreements, other remarkable initiatives are the important role of South Korea in the ASEMUS network, the National Museum of Korea being the president of its executive committee.

The exchanges and cooperation in the **audio-visual sector** show specific characteristics. The **level of investment in culture and broadcasting by EU countries is still very**

limited and seem not to be helped by the South Korean Government's regulations (rules related to broadcasting quotas, regulations on ownership, nationality requirements etc.).

Concerning **film and TV programmes' export**, Asia is the first destination, whereas Hollywood movies are the most imported in South Korea. The international recognition of South Korean film and film directors – in particular in the most famous European festivals such as Cannes, Berlin and Venice – boosted the South Korean film industry despite the fact that only a minority of the awarded films were successful at the box office back in South Korea.

One sector which has a **good potential** for development is the **animation sector**: in terms of profit of the South Korean industry, this is one of the sectors with the highest annual increase since 2007 (15.4% on average). Most South Korean companies see the Protocol of Cultural Cooperation as a good asset to penetrate more easily the EU distribution market. According the CARTOON-European Animation Film Association, 11 projects are currently being developed for potential co-productions.

Finally, since 2005, 60 films were co-produced between South Korea and non-EU countries. In the last five years, however, **no film has been co-produced with any EU country apart from France**. The last co-production with one EU country was in 2006: *Daisy*, by Lau Wai Keung (Chinese director), a South-Korea-Hong Kong-the Netherlands co-production shot in the Netherlands.

France is currently the only EU country having signed a film co-production agreement with South Korea, in 2006: since then two films have been co-produced and four are under development. The experience of this agreement shows interesting advantages for the partners, mainly in terms of tax benefits, funding schemes and access to markets in the EU, South Korea and bigger markets such as China. For the French side, the main challenge concerns the **artistic contents**, which do not always correspond to the commercial **"contents" marketed by the South Korean side**. Besides the fact that more co-production deals often happen beyond official agreements, in general co-productions open new distribution markets, a relevant advantage in particular when related to the Chinese market.

In view of the above and taking into consideration the advancements made in all sectors, a set of **recommendations** – interconnected and mutually benefitting – is suggested below.

- **Policy-level strategy meetings**: Meetings between experts from South Korea and the EU could allow exchanges and mutual learning on the economic impacts of cultural and creative industries and on possible areas of cooperation between the two regions in this field. South Korea has redefined its strategy towards cultural and creative industries after the Asian economic crisis in 1997, while the European Commission is increasingly emphasising the contribution of cultural and creative

industries to boost jobs and growth in Europe²⁰⁹. The topics that could be discussed at a policy level include the methodologies to measure the impacts of culture and arts on the economic growth, the conditions for foreign investment from the EU in the South Korean culture and broadcasting sectors, the process of digitisation in the publishing sector, the alternative sources of funding for culture, the relations between environment and culture, and obviously the differences between the Asian and European contexts and the positioning of cultural and creative industries as an element of a wider cultural system.

- **People-to-people professional encounters:** there is a **crucial need to set up long-term and focused platforms of exchange in the cultural and audio-visual sectors** covered by this report, in order to engage into collaboration projects, researches and/or co-productions. A more long-term perspective of such platforms would help overcome misconceptions and misinterpretations about each other, considering the limited opportunities that people from EU and South Korea have to interact. Depending on the sectors, such platforms could take the form of workshops, peer-to-peer learning, seminars, “go and see” projects, residencies, field projects, pitching sessions etc. These platforms shall take into account existing partnerships: for instance in the field of performing arts, KAMS’ cooperation projects with single EU countries; in the film sector, the workshops organised by KOFIC and the French CNC.
- **Focus on diversity:** At a **geographical level**, more European countries shall be represented in the exchanges between the two regions, and the experiences of single EU countries like the Czech Republic could serve as a reference for other smaller European countries. This would bring a more balanced and diverse image of Europe and culture to South Korean. An active EUNIC cluster in Seoul might facilitate such activities. This diversity shall also be more present in the **art and cultural fields** covered: contemporary art forms – in visual, performing or cross-media arts – and more alternative forms of expressions shall be encouraged to go beyond a certain image of an official or too commercialised culture.
- **Focus on youth and education:** Considering the focus of South Korea on education and the increasing number of South Korean students in the world, cooperation shall be sought in key areas such as the publishing and the children/educational books (through a possible common EU action during the Seoul International Book fair), the museum education field and the animation sector, often targeting young audiences.
- **Audio-visual sector:** The **animation sector**, which has already a good potential for growth, could be encouraged to develop co-production projects through support to professional encounters and targeted pitching sessions. The collaboration with

²⁰⁹ http://ec.europa.eu/culture/news/20120926-boost-growth_en.htm

Cartoon - European Animation Film Association could be strategic. For the **film co-productions**, the example of France and the importance of the artistic quality of contents shall be further explored in order to give a real impetus to EU-South Korea film co-productions. EU and South Korean film professionals would benefit from more opportunities to meet during international film festivals; such professional encounters could be open to third countries' representatives such as China, considering the potential of the triangulation relationship for EU-Korea-China co-productions, with South Korea acting as a more experienced partner in brokering relationships with this country. Finally, concerning **TV programmes**, the examples of signed agreements for distribution of South Korean dramas in Europe should be further enhanced and a meeting on the export of TV formats – rather than contents – could be implemented.

- **Cities and regions' cultural branding:** There are interesting potential lines of cooperation at the cities and regions level in the field of culture. Considering the proactive line of the South Korean government in cultural branding for cities and its effort to decentralise the country, platforms for sharing experiences could be particularly relevant for European cities, in particular the (current and former) "European Capitals for Culture".
- **Statistics on cultural mobility:** Relevant quantitative and qualitative data about the mobility of artists and cultural professionals between South Korea and the EU could be gathered, allowing for the first study of this kind that may even serve as a pilot study to be adopted also in other contexts. Such data might allow a better understanding of mobility patterns, needs, challenges and impacts and better define cultural cooperation and exchange policies and projects. The South Korean cultural sector, in particular some artists-in-residency programmes, responded positively during the preparation of this report – although eventually providing modest data – and might be interested in proactive collaborations.

Final note: just for information, the authors added in section 1.2 some information about EU initiatives in North Korea, although this goes beyond the requirements of this report.

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Annex 1: List of interviews (emails or direct meetings)

South Korea

- Jung Jin Kwon, Team manager, International Communications Team, LTI Korea
- Na-hyun Rim, VCM Liaison & International Relations Coordinator, Cultural Relations & PR Division, National Museum of Korea*
- Choi Jae Hyouk and Kim Minok, International Affairs Division administrators of the Cultural Heritage Administration of Korea
- Euna Lim, Korea Arts Management Service**
- Kiwon Hong, Associate Professor at the Graduate School of Public Policy and Industry, Sookmyung Women's University, South Korea
- Dr Reimar Volker, Director of Programs East-Asia, Goethe-Institut, Seoul, Korea
- Jacques Soullou, Cultural Attaché, French Embassy, Seoul, Korea
- Daniel Kapelian, Audio-visual attaché, French embassy, Seoul, Korea (and Centre National de la Cinématographie)
- Sophie Park, Cultural section, Dutch Embassy, Seoul, Korea
- Hong-hee Kim, Director, Seoul Museum of Arts*
- Hyungmin Pai, Curator, Gwangju Design Biennale*
- Byungeun Yoo, Assistant manager, International Exchange Division, Arts Council Korea
- A. Di Vito, Cultural attaché, Istituto Italiano di Cultura, Seoul, Korea

Asia

- Ronan Lenihan, Project Executive, Intellectual Exchange, Asia-Europe Foundation (ASEF)
- Media Development Authority of Singapore
- Mladen Ivancic, Deputy Chief Executive, New Zealand Film Commission
- Brian Yecies, Senior Lecturer in Media and Cultural Studies at the University of Wollongong, Australia
- Jérémy Segay, Audiovisual attaché, Taipei (former editor for <http://film.culture360.org>)

Europe

- Jong-Soo Lee, Directeur, Centre Culturel Coréen, Paris, France*
- Georges Arsenijevic, Conseiller technique, Centre Culturel Coréen, Paris, France*
- Hervé Péjaudier and Youmi Han, *Collections coréennes*, Imago, France*
- Prof. Bertrand Lavédrine, Director, Centre de Recherche sur la Conservation des Collections, CNRS-MCC-MNHN, France
- Pirjetta Mulari, Dance Info Finland
- Mike Ribalta, Catalan Performing Arts & Fira Tarrega, Spain
- Heidi Vogels, Artist, The Netherlands (residency in Seoul in 2009)
- Michele Panella, Artistic director, Intercity Festival (Italy)*

- Marc Vandeweyer, General Director CARTOON and Yolanda Alonso, Director Cartoon Connection

* In-person interviews or exchange

** For KAMS, there has been a frequent turn over (three persons within 10 months). Additional information about KAMS was only received on 7 November 2012.

Annex 2: Culture and arts related organisations in South Korea (selection)²¹⁰

General policies

- Ministry of Culture, Sports and Tourism: <http://www.mcst.go.kr/english/index.jsp>
- Ministry of Foreign Affairs and Trade: <http://www.mofat.go.kr/english/main/index.jsp>
- Ministry of Knowledge Economy: <http://www.mke.go.kr/language/eng/index.jsp>
- Presidential Council on Nation Branding: <http://www.koreabrand.net/gokr/en>
- Cultural Heritage Administration of Korea (CHA): <http://jikimi.cha.go.kr/english>
- Korea National Commission for UNESCO: <http://www.unesco.or.kr/eng>
- Korea Communication Commission: <http://eng.kcc.go.kr/user/ehpMain.do>
- Korea Creative Content Agency: <http://www.kocca.kr/eng/index.html>

Funding cultural organisations (national/regional/local)

- Korea Foundation: <http://www.kf.or.kr/eng/main/index.asp>
- Korea Arts Management Service: <http://gokams.or.kr>
- Korea Culture and Information Service: http://www.kocis.go.kr/en/web/kocis/kocis_greetings.asp
- Arts Council Korea: <http://www.arko.or.kr/english/main.jsp>
- Korea Film Council: <http://www.koreanfilm.or.kr>
- Seoul Foundation Arts and Culture (SFAC): <http://english.sfac.or.kr>
- Busan Cultural Foundation: <http://www.bscf.or.kr>
- Daegu Cultural Foundation: <http://www.dgfc.or.kr>
- Incheon Foundation for Arts and Culture: <http://www.ifac.or.kr/english/>
- Gwangju Cultural Foundation: <http://www.gjcf.or.kr>

²¹⁰ Since not all organisations have websites in English, the last section of this listing includes general websites in English for further information.

- Daejeon Foundation for Arts and Culture: http://www.djfca.or.kr/html/en/about/about_01.html
- Gyeonggi Cultural Foundation: <http://eng.ggcf.or.kr>
- Gangwon Art and Culture Foundation: <http://www.gwcf.or.kr>
- Gyeongnam Foundation for Art and Culture: <http://www.gncf.or.kr>
- Jeonnam Art and Culture: <http://www.jncf.or.kr>

Funding bodies (private)

- Daesan Foundation (publishing): <http://daesan.or.kr>
- Kumho Asiana Cultural Foundation: <http://www.kacf.net>
- Paradise Culture Foundation: <http://www.paradise-cf.or.kr>
- Surim Cultural Foundation: <http://www.surimcf.or.kr>
- CJ Culture Foundation: <http://www.cjculturefoundation.org>
- Samsung Foundation of Culture: http://www.samsungfoundation.org/html/eng/foundation/culture_foundation.asp

Research Institutes/Think tanks (with policy recommendations)

- Korean Culture & Tourism Institute: http://www.kcti.re.kr/eng_main.dmw
- National Research Institute on Cultural Heritage: <http://www.nricp.go.kr/eng/index.jsp>
- Korea Institute for Industrial Economics and Trade: http://eng.kiet.re.kr/kiet_eng/?sub_num=213&state=view&idx=7952

Main organisations/events and venues in the publishing sector

- Korean Publishers Association: <http://eng.kpa21.or.kr/main/index.htm>
- Korea Electronic Publishing Association: <http://www.kepa.or.kr/>
- Literature Translation Institute of Korea: <http://eng.klti.or.kr/>
- Seoul International Book Fair: <http://www.sibf.or.kr/en/product/index.htm>
- Seoul International Writers' Festival: <http://siwf.klti.or.kr>
- Paju Book City: http://www.pajubookcity.org/english/sub_03_01.asp
- National Digital Library: http://www.dlibrary.go.kr/NEL_ENG/organization/Organization_01.jsp

Publishing houses - special focus on youth and education²¹¹

- Hansol education: <http://www.eduhansol.co.kr>
- Seoul Media Group: <http://www.ismg.co.kr>
- Mirea N: <http://www.mirae-n.co.kr>
- Montessori Korea: <http://www.montessori.co.kr>
- Jei corporation: <http://www.jei.com/>
- Chunjae education: <http://www.chunjae.co.kr>
- Jihaksa Publishing: <http://www.jihak.co.kr>
- Daekyo Publishing: <http://www.daekyo.co.kr>
- Doosan Donga: <http://www.doosandong.com>
- Visang: <http://www.visang.com>
- EBS: <http://www.ebs.co.kr>
- Kumsung Publishing: <http://www.kumsung.co.kr>
- Samsung publishing: <http://www.ssbooks.com>
- Yeamrimdang publishing: <http://www.yearim.kr>
- Jo-Eu-Chaek-Sinsago: <http://www.sinsago.co.kr>
- Singongsa: <http://www.sigongsa.com>
- Jangone: <http://www.jangone.co.kr>
- Neungyule Editions: <http://www.neungyule.com>

Performing Arts/Music Festivals venues

- National Theatre of Korea: <http://www.ntok.go.kr>
- Seoul Arts Centre: <http://www.sac.or.kr/eng/>
- LG Arts Center: <http://www.lgart.com/home/eng/main.aspx>
- Hooyong Performing Arts Centre: http://www.hooyongartscentre.com/page/view.php?m_id=2
- Gwangju–Hub City of Asian Culture Project: <http://www.cct.go.kr/AAT2012/eng/main/main.html>

Performing Arts/Music events

- Performing Arts Market in Seoul (PAMS): <http://en.pams.or.kr/>
- Seoul International Dance Festival: <http://www.sidance.org>

²¹¹List extracted from <http://www.bief.org/Pays-502-Asie---Oceanie/Coreee-Du-Sud.html>. See document “organigramme”. For bookshops and main publishing houses, check annexes 8 and 9.

- Hi Seoul Festival: <http://english.hiseoulfest.org>
- Seoul Performing Arts Festival: <http://www.spaf.or.kr/2012english/>
- Seoul Spring Festival of Chamber Music: <http://www.seoulspring.org>
- Chuncheon International Mime Festival: <http://www.mimefestival.com/>
- Great Mountains International Music Festival: <http://www.gmmfs.com/main.html>
- Jarasum International Jazz Festival: <http://www.jarasumjazz.com/>
- Gwacheon Hanmadang Festival: <http://kadmusarts.com/festivals/1456.html>
- Keochang International Festival of Theatre: <http://www.kift.or.kr/kift/kift2012/about>

Museums

- National Museum of Korea: <http://www.museum.go.kr/>
- Seoul Museum of Art: <http://seoulmoa.org>
- National Museum of Contemporary Art, Korea: <http://www.moca.go.kr/engN/>
- Leuum Museum of Modern Art: <http://www.leeum.org/>
- National Folk Museum of Korea: <http://www.nfm.go.kr>
- Sejong University Museum: http://www.sejong.ac.kr/eng/01about/01about_072.html
- Gyeonggi Provincial museum: <http://www.musenet.or.kr>
- Bona Museum: <http://www.bonamuseum.com>

Artist-in-residence spaces

- Seoul Art Space: <http://eng.seoulartspace.or.kr>
- Gyeonggi Creative Center (GCC): <http://www.gyeonggicreationcenter.org>
- Incheon Art Platform (IAP): <http://www.inartplatform.kr>
- Gachang Art Studio: http://www.dgfc.or.kr/open_content/community/notice/?tbl=&code=1&idx=197&s=4&k=가창
- Open space Bae: <http://www.spacebae.com/w3c/board.php?board=AIR&command=body&no=51>
- Youngeun Museum of Contemporary Art: <http://www.youngeunmuseum.org/>
- Supplement Space STONE&WATER: <http://www.stonenwater.org/>

Film Festivals (for animation films, check Annex 14)

- Busan International Film Festival (BIFF): <http://www.biff.kr/structure/kor/default.asp>
- Puchon International Fantastic Film Festival (PiFan) : <http://www.pifan.com/>
- Women's Film Festival (WFFIS): http://www.wffis.or.kr/wffis2011/00eng_intro/main.html

- Jeonju International Film Festival (JIFF): <http://eng.jiff.or.kr/>
- Seoul International Youth Film Festival (SIYFF): <http://www.siyff.com/intro/intro.asp>
- Jecheon International Music & Film Festival (JIMFF): <http://www.jimff.org/kr/index.asp>

Biennales and Arts Festivals

- Gwangju Biennale: <http://www.gwangjubienale.org>
- Busan Biennale: <http://www.busanbiennale.org/main/>
- Seoul International Media Art Biennale: <http://mediacityseoul.kr/>
- Seoul Design Festival : <http://www.designfestival.co.kr/kor/index.asp>
- Korea Experimental Art Festival: <http://kopas2000.blogspot.fr/search/label/KEAF2011>
- Geumgang Nature Art Biennale: <http://natureartbiennale.org/>
- Anyang Public Art Project - APAP: <http://apap2010.org/>

Websites with information about South Korea (arts and culture)

- Gateway to Korea: <http://www.korea.net>
- APRO online system providing information and statistics about the Performing Arts Sector in Korea: http://eng.theapro.kr/?sub_num=31 and directory: http://eng.theapro.kr/?sub_num=13
- Articles, news, references (arts and culture) about South Korea: <http://culture360.org/category/events/?cntry=korea>
- Korea Foundation (quarterly journal on cultural heritage): <http://www.koreana.or.kr/index.asp?lang=en>
- Click Korea is an online resource developed by the Korea Foundation to meet the need for broader access to information about Korean Arts & Culture: <http://www.clickkorea.org/>
- Information about contemporary visual arts: <http://eng.theartro.kr/>

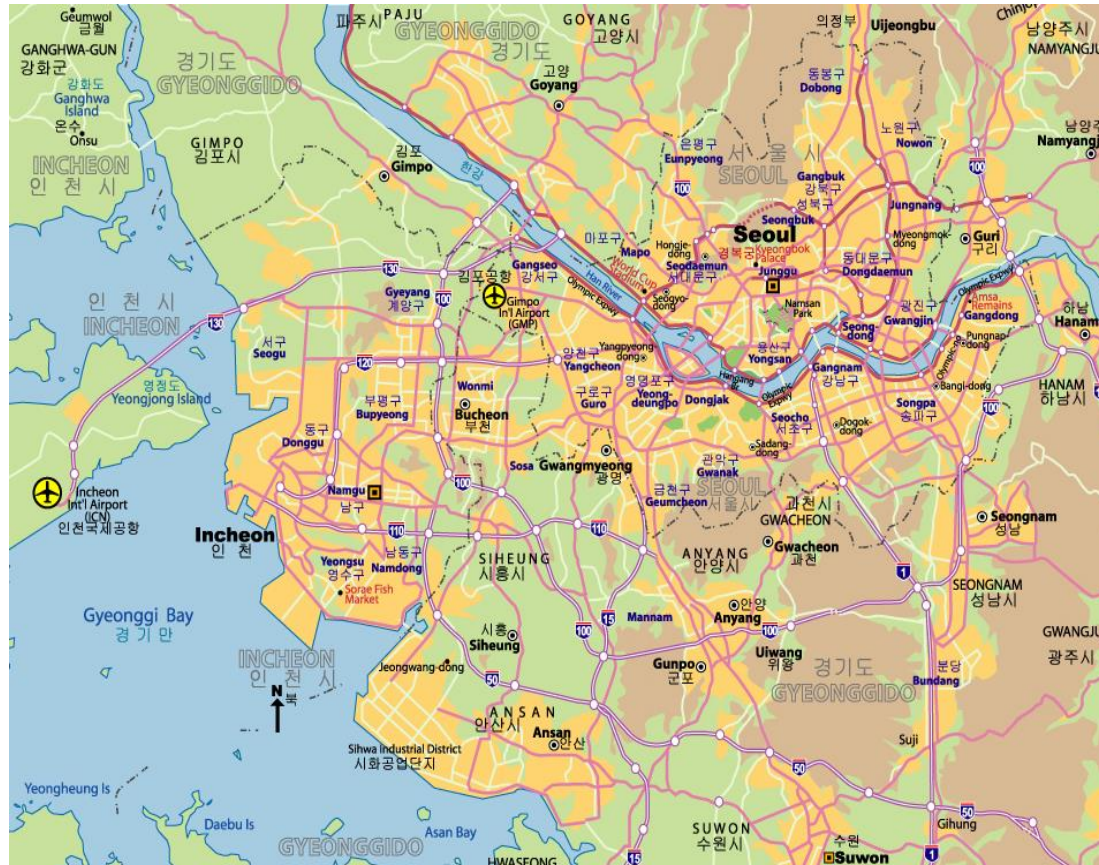
by Marie Le Sourd, Elena Di Federico and Sung-Won Yoon
EENC Report, November 2012 (partially updated, September 2013)

Annex 3: Maps of South Korea: Map of the country and map of South Korea's surrounding countries



Source: travel.nationalgeographic.com

Annex 4: General map of Seoul and its suburb



Source: johomaps.com

Annex 5: List of ministers of culture since 1945

Number	Name (First name, Last name)	Period
1	Dong-Sung, Kim	04/AUG/1945~03/JUNE/1949
2	Cheol-Won, Lee	04/AUG/1949~14/AUG/1950
3	Hwal-Ran, Kim	15/AUG/1950~25/NOV/1950
4	Cheol-Won, Lee	26/NOV/1950~01/JAN/1953
5	Yeon-Seang, Ahn	02/JAN/1953~05/MAR/1953
6	Hong-Ki, Gal	06/MAR/1953~22/JUL/1956
7	Jae-Kyung, Oh	23/JUL/1956~30/JAN/1959
8	Sung-Chun, Jeon	31/JAN/1959~07/APR/1960
9	Chi-Hwan, Choi	08/APR/1960~04/MAY/1960
10	Seock-Sun, Seo	05/MAY/1960~19/MAY/1960
11	Heung-Sun, Shim	20/MAY/1961~06/JUL/1961
12	Jae-Kyung, Oh	07/JUL/1961~07/JUNE/1962
13	Won-Woo, Lee	18/JUNE/1962~11/APR/1963
14	Sung-Hee, Im	12/APR/1963~16/DEC/1963
15	Dong-Sung, Kim	17/DEC/1963~10/MAY/1964
16	Soo-Young, Lee	11/MAY/1964~01/SEP/1964
17	Jong-Chul, Hong	02/SEP/1964~10/APR/1969
18	Bum-Sik, Shin	11/Apr/1969~03/JUNE/1971
19	Joo-Young, Yoon	04/JUNE/1971~17/SEP/1974
20	Won-Kyung, Lee	18/SEP/1974~18/DEC/1975
21	Sung-Jin, Kim	19/DEC/1975~13/DEC/1979
22	Kyu-Hyun, Lee	14/DEC/1979~21/MAY/1980
23	Gwang-Pyo, Lee	22/MAY/1980~20/MAY/1982
24	Jin-Hee, Lee	21/MAY/1982~18/FEB/1985
25	Won-Hong, Lee	19/FEB/1985~26/AUG/1986
26	Woong-Hee, Lee	27/AUG/1986~24/FEB/1988
27	Han-Mo, Chung	25/FEB/1988~04/DEC/1988
28	Byung-Ryeol, Choi	05/DEC/1988~02/JAN/1990
29	Er-Ryoung, Lee	03/JAN/1990~19/DEC/1991
30	Soo-Jung, Lee	20/DEC/1991~25/FEB/1993
31	Min-Seop, Lee	26/FEB/1993~23/DEC/1994
32	Dong-Sik, Joo	24/DEC/1994~20/DEC/1995

by Marie Le Sourd, Elena Di Federico and Sung-Won Yoon
EENC Report, November 2012 (partially updated, September 2013)

33	Young-Soo, Kim	21/DEC/1995~05/MAR/1997
34	Tae-Ho, Song	06/MAR/1997~02/MAR/1998
35	Nak-Kyun, Shin	03/MAR/1998~23/MAY/1999
36	Ji-Won, Park	23/MAY/1999~19/SEP/2000
37	Han-Gil, Kim	20/SEP/2000~18/SEP/2001
38	Gung-Jin, Nam	19/SEP/2001~10/JUL/2002
39	Sung-Jae, Kim	11/JUL/2002~26/FEB/2003
40	Chang-Dong, Lee	27/FEB/2003~30/JUNE/2004
41	Dong-Chae, Jung	01/JUL/2004~06/MAR/2006
42	Myung-Gon, Kim	07/MAR/2006~07/MAY/2007
43	Jong-Min, Kim	08/MAY/2007~28/FEB/2008
44	In-Chon, Yoo	29/FEB/2008~26/JAN/2011
45	Byung-Guk, Jung	27/JAN/2011~16/SEP/2011
46	Kwang-Sik, Choe	17/SEP/2011 ~

Source: Information consolidated by the Researcher Dr Sung-Won Yoon

Annex 6: Percentage of South Korea's yearly budget for culture

South Korea: Percentage of yearly budget for culture

	2002	2003	2004	2005	2006	2007	2008	2009	2010
Cultural ministry only 1	1.37	1.26	0.98	1.00	0.99	0.96	1.00	0.94	1.08
Cultural sector overall 2	1.68	1.56	1.23	1.25	1.25	1.21	1.29	1.22	1.39

1 Ministry of Culture and proceeds from the Culture and Arts Promotion Fund

2 Budget for Ministry of Culture (including proceeds from the Culture and Arts Promotion Fund) as well as the budget for the Heritage Administration Agency and the Broadcasting and Media Council.

Source: Comparative study on cultural budget in five OECD countries (2010), Korea Culture and Tourism Institute

Online source: <http://culture360.org/magazine/korea-an-introduction-to-cultural-policy-part-i/>

Annex 7: List of most important bookshops in South Korea

Name of the bookshop	Overall turnover in € (2009)
Kyobo*	278 265 923
Yes24	186 573 670
Interpark*	136 567 443
Youngpoong	83 447 503
Aladin	67 692 116
Seoul Books*	48 013 451
Libro* (1)	45 771 578

Source : KPA, 2008

*: the total turnover includes off and online activities of the bookshops

(1): Libro is the bookshop chain created by the publishing house Sigongsa.

These seven book chains represent more than 52% of the total turnover of the sector

Internal source: report on the publishing sector in South Korea, by the Bureau International de l'Édition Française, April 2010. <http://www.bief.org/Pays-502-Asie---Oceanie/Coreee-Du-Sud.html>

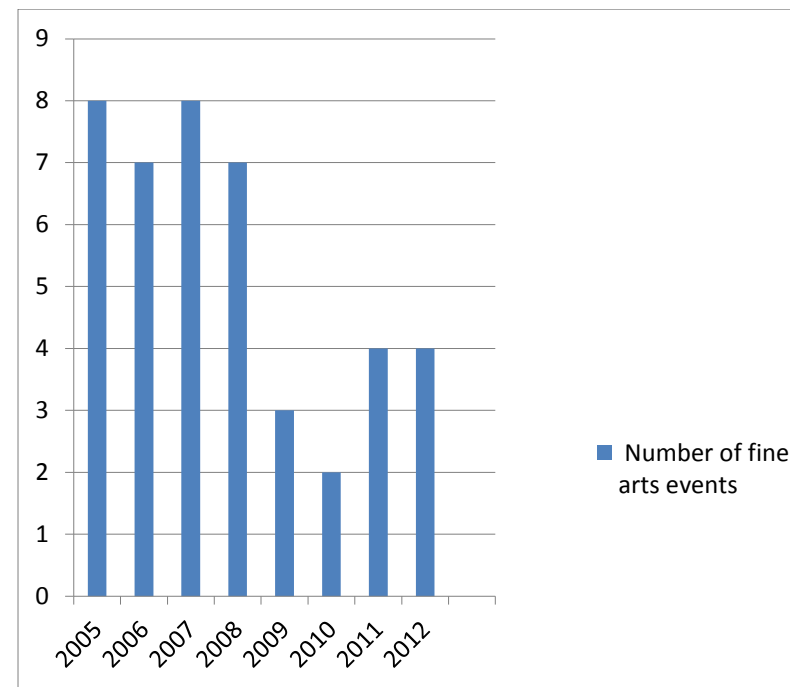
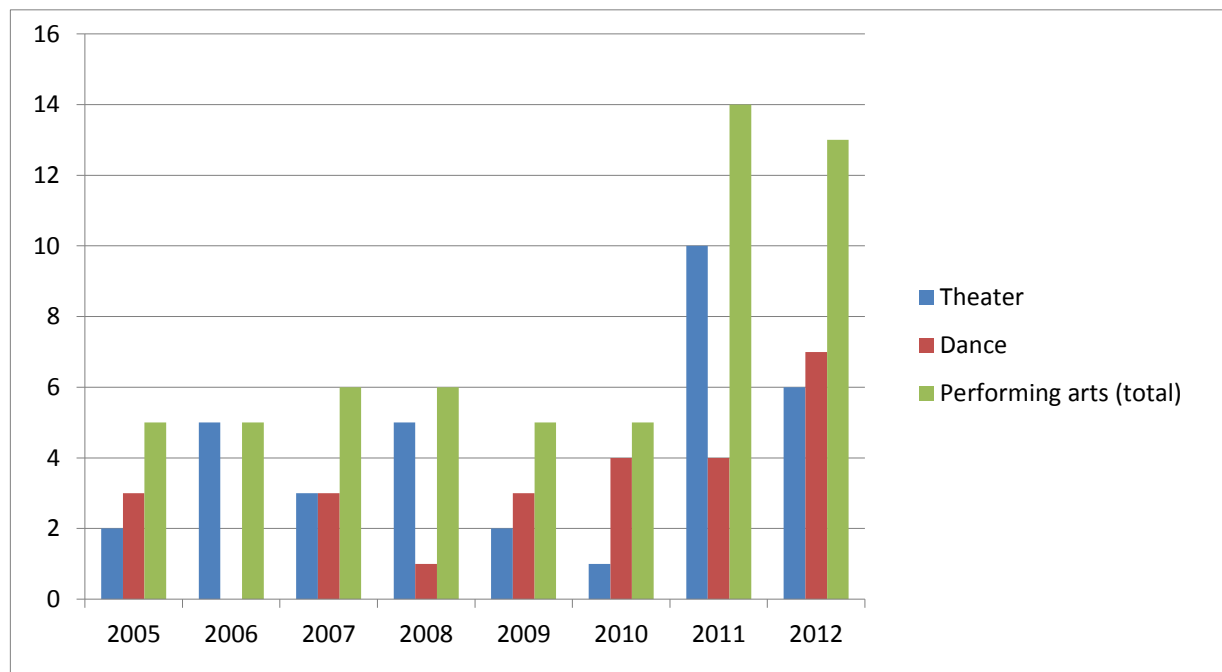
Annex 8: Main publishing houses in South Korea (based on the number of published titles)

Publishers	Specialities	Number of titles published (KPA 2008)
Daewon	Comics	1294
Woongjing Think Big	Generalist	1027
Haksan publishing	Comics	963
Bukdu Publishing	Comics	864
Cham Geul Media	Comics	853
Damoa	<i>Non advised</i>	722
Seoul Munhwa	Comics	664
D&C Media	Literature (Science fiction)	499
Donga & Balhae	Romantic novels	482
Maya & Maru	Romantic novels	443
Piaget Korea	Youth	432
Rok Media	Literature (Science fiction)	425
Samyang Book	Comics	409
Book 21	Daily, essays, youth	406
Chunjae education	Schools and education	372
Chungeoram	Literature (Science fiction)	372
Kyowon	Youth, education	334
Random House Korea	Generalist	333
Hyunmoon	Medicine	330
Hwansang Media	Literature (Science fiction) and romantic novels	315

Internal source: report on the publishing sector in South Korea, by the Bureau International de l'Édition Française, April 2010. <http://www.bief.org/Pays-502-Asie---Oceanie/Coreee-Du-Sud.html>

Check also the "organigramme" link under the web-link for additional references for publishing houses in South Korea (explanations in French)

**Annex 9: Cooperation projects between Goethe-Institut Korea and South Korea
(Visual and Performing Arts): 2005-2012**



Source: Goethe Institut-Seoul (October 2012)

Annex 10: Status of Annual Profit in South Korea's Content Industry

(Unit: billion KRW²¹²)

	2007	2008	2009	2010 (%)	2011 (est.)	Annual Increase (in average)
Film	3,183.3	2,885.5	3,306.6	3,432.8 (4.8%)	3,457.2	2.1%
Animation	311.1	404.7	418.5	514.3 (0.7%)	551.3	15.4%
Music	2,357.7	2,602.0	2,740.7	2,959.1 (4.1%)	3,869.4	13.2%
Game	5,143.6	5,604.7	6,580.6	7,431.1 (10.3%)	9,202.7	15.7%
Character	5,151.6	5,098.7	5,358.2	5,896.8 (8.2%)	7,214.8	22.4%
Cartoon	761.6	723.2	739.0	741.9 (1.0%)	757.0	-0.2%
Publication	21,595.5	21,052.9	20,609.1	21,243.7 (29.5%)	21,024.7	-0.7%
Broadcasting	10,534.3	9,354.6	9,884.9	11,176.4 (15.5%)	13,749.7	6.9%
Advertisement	9,434.6	9,311.6	9,186.8	10,323.1 (14.3%)	11,715.1	5.6%
Knowledge information	4,297.3	4,777.3	5,255.1	6,204.1 (8.6%)	8,041.8	17.0%
Contents solution	1,679.8	1,866.1	2,036.3	2,196.2 (7.9%)	2,828.7	13.9%
Total	64,414.7	63,681.7	66,116.4	72,120.1 (100%)	82,413.0	6.4%

Source: Korea Creative Content Agency (2011) "White Paper on Content Industry 2011." p.59 (in Korean)

²¹² KRW: Korean Won. For currency exchange rate: <http://ec.europa.eu/budget/inforeuro>

Annex11 (a): Film market share in 2012 (per distributor)

	Distributor	No. of Film Released	Admissions (person)	Market Share by Admissions	Box Offices (KRW)	Market Share by Box Offices
	CJ Entertainment & Movie	22.5	17,560,834.50	21.50%	134,965,721,796	21.50%
	Lotte Entertainment	21	13,773,036	16.90%	100,629,750,306	16.00%
	Sony Pictures Releasing Buen Vista International Korea	10	13,579,036	16.60%	113,862,797,835	18.10%
	Next Entertainment World (NEW)	8.5	11,804,705	14.50%	88,321,839,400	14.10%
	ShowBox	6	7,781,378	9.50%	58,831,006,000	9.40%
	Warner Brothers Korea	5	3,731,399	4.60%	30,135,195,000	4.80%
	Universal Pictures International Korea	7	3,434,978	4.20%	25,242,643,500	4.00%
	20 th Century Fox Korea	7	2,769,598	3.40%	22,163,703,899	3.50%
	Filament Pictures	4	2,639,150	3.20%	19,991,340,500	3.20%
0	Synergy House	3	861,773.50	1.10%	6,453,975,306	1.00%
	Others	168	3,720,690.00	4.56%	27,528,781,630	4.38%
	Total	262	81,656,578.00		628,126,755,172	

Source: Korea Film Council (2012) "Korean Film Industry in the First Half of 2012." p.7

Annex 11 (b): Admissions and market share of international films in the South Korean market in 2012

Country	Category	No. of Films	Box Offices (KRW 100 million)	Market Share by Box Offices (%)	Admissions (person)	Market Share by Admissions (%)	
Korea	Screenings	211	8,356	57.9	11,446	59.2	
	First run	175	8,244	58.9	11,296	60.2	
USA	Direct Distribution	Screenings	53	3,844	26.7	4,879	25.3
		First run	45	3,767	26.9	4,776	25.5
	Imports	Screenings	137	1,298	9.0	1,712	8.9
		First run	119	1,100	7.9	1,455	7.8
	Sub-total	Screenings	190	5,142	35.7	6,591	34.2
		First run	164	4,867	34.8	6,231	33.3
China	Screenings	30	45	0.3	64	0.3	
	First run	30	45	0.3	64	0.3	
Europe	Screenings	136	619	4.2	832	4.3	

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	First run	116	617	4.3	830	4.4
Japan	Screenings	129	201	1.4	306	1.6
	First run	120	160	1.1	250	1.3
Other	Screenings	29	63	0.4	86	0.5
	First run	26	63	0.4	86	0.5
Total	Screenings	725	14,425	100.0	19,325	100.0
	First run	631	13,996	100.0	18,757	100.0

Source: Korea Film Council (2013) *Korean Film Yearbook 2013* pp. 15 [Table last updated: September 2013]

Annex 11 (c): Admissions and market share of international films in the South Korean market (first half of 2013)

Country	Category	No. of Films	Box Offices (KRW hundred million)	Market Share by Box Offices (%)	Admissions (Ten thousand persons)	Market Share by Admissions (%)
Korea	Screenings	102	3,990	55.4	5,546	56.6
	First run	70	3,690	55.6	5,133	57.0

USA	Direct Distribution	Screenings	23	2,033	28.2	2,629	26.8
		First run	20	1,799	27.1	2,307	25.6
	Imports	Screenings	119	912	12.7	1,221	12.5
		First run	107	909	13.7	1,216	13.5
	Sub-total	Screenings	142	2,945	40.9	3,850	39.3
		First run	127	2,707	40.8	3,523	39.1
	China	Screenings	21	26	0.3	37	0.3
		First run	18	26	0.4	37	0.4
Europe	Screenings	108	151	2.2	218	2.2	
	First run	82	133	2.0	193	2.1	
Japan	Screenings	83	55	0.8	83	0.9	
	First run	76	53	0.8	80	0.9	
Other	Screenings	27	42	0.6	63	0.6	
	First run	19	26	0.4	39	0.5	

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Total	Screenings	483	7,209	100.0	9,797	100.0
	First run	392	6,634	100.0	9,005	100.0

Source: Korea Film Council (2013) "Korean Film Industry in the First Half of 2013", p. 7. [New table, September 2013]

Annex 12: Multiplex Cinema in South Korea

Section				2011			2012								
				No. of Theaters	No. of Screens	No. of Seats	No. of Theaters	Increase	Increase Rate (%)	No. of Screens	Increase	Increase Rate (%)	No. of Seats	Increase	Increase Rate
Multiplex	3 Major Multiplex	CGV	CGV	85	673	116,643	93	8	9.4	731	58	8.6	129,933	13,290	11.4
			Primus	23	161	24,024	19	-4	-17.4	127	-34	-21.1	18,660	-5,364	-22.3
		Sub-total	108	834	140,667	112	4	3.7	858	24	2.9	148,593	7,926	5.6	
		Lotte Cinema	69	507	89,147	84	15	21.7	590	83	16.4	101,404	12,257	13.7	
		Megabox	51	384	65,287	54	3	5.9	403	19	4.9	67,229	1,942	3.0	
		Sub-total	228	1,725	295,101	250	22	9.6	1,851	126	7.3	317,226	22,125	7.5	
	Other Multiplex	14	132	25,152	13	-1	-7.1	116	-16	-12.1	23,030	-2,122	-8.4		
	Sub-total	242	1,857	320,253	263	21	8.7	1,967	110	5.9	340,256	20,003	6.2		
Non- Multiplex				53	127	23,759	51	-2	-3.8	114	-13	-10.2	18,403	-5,356	-22.5
Total				295	1,984	344,012	314	19	6.4	2,081	97	4.9	358,659	14,647	4.3

Source: KOFIC (2013) Korean Film Council 2013 (p.119). [Table last updated: September 2013]

Annex 13: Main Film Festivals in the EU with a South Korean presence

Name	Venue	Year of creation	Time Period	History of Major Korean Participants: Directors and Actors	Organiser
Cannes Film Festival (<i>Le Festival International du Film de Cannes</i>)	Cannes, France	1946	About 2 weeks in May	1984 – Director Lee, Doo-yong 1999- Director Lim, Gwon-taek 2002- Director Lim, Gwon-taek 2004- Director Park, Chan-wook 2007- Director Lee, ChangDong; Actress Jeon, Do-yeon	Festival de Cannes
Berlin International Film Festival (<i>Internationale Filmfestspiele Berlin</i>)	Berlin, Germany	1951	About 10-11 days in February	1961- Director Kang, Dae-jin 1962- Director Jeon, Young-seon 1994 - Director Jang, Seon-woo 2000-2002- Director Kim, Ki-duk	Berlinale
Venice International Film Festival (<i>Mostra Internazionale d'Arte Cinematografica della Biennale di Venezia</i>)	Venice, Italy	1932	About 10 days late August or early September	1961- Director Shin, Sang-ok 1987- Director Lim, Kwon-taek; Actress Kang, Soo-yeon 2002- Director Lee, Chang-dong; Actress Moon, So-ri 2012- Director Kim, Ki-duk	La Biennale di Venezia

Source: information consolidated by the researcher Dr Sung-Won Yoon

Annex 14: Animation Film Festivals in South Korea and the EU

Animation Film Festivals in South Korea

Name	Venue	Year Initiated	Time Period	Organiser
Seoul International Cartoon and Animation Festival (SICAF) - http://www.sicaf.org/2012/eng/index.jsp	Seoul, Korea	1995	5 days in April (in 2012, held mid-July)	Sponsored jointly by the Ministry of Culture, Sports and Tourism & Seoul
Puchon International Student Animation Festival - http://www.pisaf.or.kr/	Puchon, Korea	1999	early November (5 days)	PISAF Committee
International Animation Day event - http://www.asifakorea.com/index.php	Seoul, Korea	2002	Mid-November 2006, 2009 (3-5 days)	ASIFA Korea

Animation Film Festivals in the EU, with a South Korean presence

Name	Venue	Year Initiated	Time Period	History of Major Korean Participants: Directors and Actors	Organiser	Remarks
Annecey Festival International du film d'animation (MIFA)	Annecey, France	1960	Early-June (6 days)	1999- Director Lee, Seong-kang; Director Lee, Myeong-ha 2000-Director Lee, Myeong-ha 2002-Director Lee, Seong-kang	CITIA	
London International Animation Festival	London, UK	2003	August and September (10 days)		LIAF	
'AniFest' International Festival of Animated Films	Prague, Czech Republic	2002	Late April and early May (6 days)		AniFest Ltd.	Invited to screen films at the "European Ani-Festival in Seoul" in 2007 and 2008
'Les Nuits Magiques' International Animated Film Festival	Bègles, France		Early December (10 days)			Invited to screen films at the "European Ani-Festival in Seoul" in 2008

'AURORA' (Norwich International Animation Festival)	Norwich, UK	Since 1980s, rebranded as AURORA in 2007	Late in the year September-November (5 days)			Invited to screen films at the "European Ani-Festival in Seoul" in 2008
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Source: information consolidated by the Researcher Dr Sung-Won Yoon

Annex 15: Detailed breakdown of FDI from 2010 till 2012

FDI from EU countries in 2010

(Unit: Thousand USD)

	Other Related Fields	
	No. of Reported Cases	Reported Amount
Hungary	1	431

Source: Statistical Data from the Ministry of Knowledge Economy (<http://www.mke.go.kr/mke/index.jsp#>)

FDI from EU countries in 2011

(Unit: Thousand USD)

	Advertising film & video production		Other Related Fields	
	No. of Reported Cases	Reported Amount	No. of Reported Cases	Reported Amount
Netherlands	2	14,429		
Hungary			1	435

Source: Statistical Data from the Ministry of Knowledge Economy (<http://www.mke.go.kr/mke/index.jsp#>)

There was no reported case of European investment in 2012 Q1-Q3.

Status of FDI in South Korea – Culture & Entertainment Industry (by genre)

(Unit: Thousand USD)

Year	2010 (Q1-Q4)		2011 (Q1-Q4)		2012 (Q1-Q4)	
	No. of Cases	Amount	No. of Cases	Amount	No. of Cases	Amount
Culture & Entertainment	44	110,115	44	469,315	41	97,062
Culture & Broadcasting Industry	28	28,363	22	157,317	22	14,099
- Film & Video Production	5	525	5	40,755	5	4,694
- Animation & Video Production	2	91	1	948		
- Advertising Film & Video Production			2	14,429		
- Service on Film & Video Production	2	169	2	45,600		
- Film Distribution	2	377				
- Skywave Distribution						
- Performance	6	24,233	6	52,809	4	3,350
- Others	11	2,968	6	2,776	12	5,955
- Leports	16	81,751	22	311,998	19	82,963

Source: Korea Creative Content Agency (2013) "Report on Content Industry in 2012." p.33 (in Korean).

[Table last updated: September 2013]

Annex 16 (a): Exports of South Korean Motion Pictures

(Unit: USD)

	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Total Exports	11,249,573	14,952,089	30,979,000	58,284,600	75,994,580	24,514,728	24,396,215	21,036,540	14,122,143	13,582,850
-Asia	8,271,865	10,499,979	19,024,000	45,327,500	66,143,686	17,029,759	9,011,114	12,972,878	10,228,838	6,712,061
-North America	1,234,600	695,500	4,486,000	2,900,000	2,014,500	1,959,200	8,775,791	3,134,805	891,555	1,421,297
-Europe	1,566,412	2,365,500	5,724,000	8,245,250	7,315,970	4,902,054	4,696,326	4,139,480	2,372,870	4,518,034

Source: ADBI Working Paper 354 (2012: 8)

Annex 16 (b): South Korea's film exports: By region

(Unit: USD)

Region	The amount of export (USD)				Change of percentage (YOY, %)
	2011	In percent	2012	In percent	
Asia	9,012,061	56.9	14,439,757	71.6	60.2
North America	1,672,677	10.6	2,872,752	14.2	71.7
Europe	3,522,333	22.3	2,455,745	12.2	-30.3
Middle & South America	147,000	0.9	233,500	1.2	58.8
Oceania	309,891	2.0	134,196	0.7	-56.7
Middle East	132,000	0.8	39,000	0.2	-70.5
Africa	53,000	0.3	0	0.0	-100.0
Others	979,700	6.2	0	0.0	-100.0
Total	15,828,662	100.0	20,174,950	100.0	27.5

Source: Korean Film Council (2013) *Korean Film Yearbook 2013*, p. 35. [Table last updated: September 2013]

Annex 16 (c): Top 10 Export Destinations of Korean Films in 2012: By Country

Country	The amount of export (USD)				Change of percentage (YOY, %)
	2011	In percent	2012	In percent	
Japan	3,663,437	23.1	9,679,008	48.0	164.2
US	1,652,594	10.4	2,341,685	11.6	41.7
Hong Kong	623,950	3.9	1,175,300	5.8	88.4
China	1,004,000	6.3	832,700	4.1	-17.1
France	940,980	5.9	730,809	3.6	-22.3
Singapore	799,600	5.1	581,908	2.9	-27.2
Thailand	715,000	4.5	500,000	2.5	-30.1
Taiwan	931,000	5.9	407,794	2.0	-56.2
UK	780,000	4.9	331,892	1.6	-57.4
Germany	1,490,930	9.4	326,773	1.6	-78.1
Others	3,227,171	20.4	3,267,081	16.2	1.2
Total	15,828,662	100.0	20,174,950	100.0	27.5

Source: Korean Film Council (2013) *Korean Film Yearbook 2013*, p. 126. [Table last updated: September 2013]

Annex 16 (d): South Korea's audio-visual exports in 2011: Film industry
(Unit: US\$1,000)

Area	Country	Terrestrial Broadcasting		Programme Provider	
		Number of Episodes	Volume (USD 1,000)	Number of Episodes	Volume (USD 1,000)
Asia	Japan	13,372	90,993.8	316	3,503.1
	China	5,355	16,619.1	86	175.0
	Hong Kong	1,578	3,546.5	21	65.2
	Singapore	3,707	2,998.2	72	68.0
	Taiwan	3,312	18,885.9	52	217.0
	Vietnam	3,065	2,605.8	36	40.0
	Malaysia	2,295	1,579.9	13	39.0
	Indonesia	1,413	1,231.4	19	4.0
	Thailand	1,119	2,090.7	16	17.5
	Philippines	1,273	3,545.5		
	Myanmar	3,757	1,193.4	130	125.5
	Cambodia	2,167	397.7	32	11.2
	Kazakhstan	807	389.5		
	Mongolia	533	53.1		
	Turkey	432	311.0		
	Arab Emirate	24	28.8		
	Jordan	-	-		
	Iran	214	124.8		
	Israel	52	16.0		
	Other Asia	908	239.9	12	120.0

America	US	487	2,116.7	317	228.4
	Canada	-	-	0	0
	Mexico	16	6.4		
	Brazil	-	-	0	0
	Argentina	25	13.8		
	Other South America	255	89.3		
Europe	France	45	81.5		
	United Kingdom	-	-	0	0
	Germany	-	-		
	Italy	-	-	0	0
	Spain	-	-		
	Hungary	97	77.6		
	Russia	-	-		
	Netherlands	-	-		
	Romania	657	491.0		
	Norway	-	-		
	Denmark	-	-		
	Belgium	54	16.9		
	Bulgaria	40	29.0		
	Serbia	60	18.0		
	Switzerland	-	-		
	Ireland	-	-		
	Austria	-	-		
	Ukraine	-	-		

	Czech Republic	-	-		
	Portugal	-	-		
	Poland	20	8.0		
	Finland	-	-		
	Other Europe	388	154.3		
Oceania		-	-	0	0
Africa		404	45.3		
Others		20	3.5		

Source: Slightly modified from Korea Communications Commission (KCC) (2012) "2012 Report on Broadcasting Industry", pp. 151-158.
[Table last updated: September 2013]

Annex 16 (e) : South Korea's audio-visual exports: Animations (Unit: US\$1,000)

Year	2008	2009	2010
Amount	80,583	89,651	96,827

Note: no indication on the destination

Source: Korea Creative Contents Agency (2011), "Animation Industry White Paper 2011" (Currency: US\$)

Annex 16 (f): Exports of South Korean TV Dramas (Unit: US\$1,000)

Area	Country	2009		2010	
		Number of Episodes	Volume	Number of Episodes	Volume
Asia	Japan	9,429	62,084	6,580	46,659
	China	5,579	64,325	9,521	15,169
	Hong Kong	1,672	3,913	1,772	4,290
	Singapore	2,298	2,525	1,583	1,763
	Taiwan	4,271	11,433	4,065	27,414
	Vietnam	2,263	1,824	2,545	4,521
	Malaysia	496	842	588	4,065
	Indonesia	485	328	812	501
	Thailand	1,531	3,035	1,361	2,142
	Philippines	530	1,756	1,162	2,519
	Myanmar	2,118	723	3,236	2,410
	Cambodia	836	189	1,395	225

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	Laos	25	4	-	-
	Mongolia	-	-	140	13
	Brunei	433	279	-	-
	Armenia	36	8	51	10
	Uzbekistan	220	45	98	22
	Kazakhstan	224	150	657	344
	Turkey	51	31	233	162
	Arab	25	30	356	417
	Jordan	44	26	26	75
	Iran	36	29	-	-
	Afghanistan	-	-	59	58
	Israel	-	-	57	18
	Other Asia	725	275	206	541
	Sub-total	33,327	153,854	36,503	113,338
America	US	446	121	182	1,939
	Peru	-	-	38	8
	Panama	-	-	40	4
	Venezuela	-	-	38	8
	Ecuador	-	-	38	11
	Bolivia			58	7
	Other South America	70	29	40	22
	Sub-total	516	150	434	1,999
Europe	France	149	2	-	-
	United Kingdom	149	2	-	-
	Spain	-	-	2	2

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	Hungary	1	2	62	51
	Russia	-	-	38	589
	The Netherlands	149	2	-	-
	Romania	-	-	81	450
	Poland	-	-	24	10
	Belgium	-	-	110	15
	Bulgaria	-	-	55	14
	Ukraine	-	-	20	2
	Other Europe	1,113	630	1	36
	Sub-total	1,561	638	393	1,169
Africa	Botswana	-	-	45	6
	Kenya	-	-	51	5
	Tanzania	-	-	36	5
	OtherAfrica	909	544	21	74
	Sub-total	909	544	153	90
Total		36,313	155,186	37,483	116,596

Source: Korea Communications Commission (2010, 2011) "Report on Broadcasting Industry"

** The data on 2011 will be published in the first half of 2013.

** The performance of the year 2012 will be studied in 2013.

Annexe 16 (g): South Korea's Export of Broadcasting Contents by country and region (Unit: US\$1,000)

Region	Country	2010	2011
Asia	Japan	81,615	130,971.8
	China	13,391	21,387.3
	Hong Kong	4,825	3,893.1
	Singapore	2,312	5,012.2
	Taiwan	20,011	22,115.2
	Vietnam	2,210	2,833.0
	Malaysia	1,574	1,805.7
	Indonesia	790	1,245.5
	Thailand	3,536	2,699.6
	Philippines	4,139	2,219.7
	Cambodia	508	504.9
	Myanmar	1,339	1,320.0
	Mongolia	17	
	Other Asia	672	241.6
America	US		2,806.2
	North America	1,996	792.8
	South America	10,585	
Europe	UK	33	0.0
	Europe (exc.UK)	596	1,905.5
	CIS	329	480.9
	Russia	75	12.8
Oceania	Australia	0	20.0

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Middle East	217	624.8
Africa	544	43.4
Others	82	670.2
Total	151,398	203,732.7

Source: Adapted from *KOCCA Focus* (2011, 2012)

* Broadcasting contents include drama, documentary, animation, film, entertainment, culture, etc. Among them, drama accounts for the largest proportion (81.9% in 2011).

* This table contains the export of broadcasting contents by terrestrial broadcasting operators and cable system operators.

Annex 17: List of potential animation co-productions (including with South Korea and Malaysia)

The following projects are currently under discussion between European and Korean / Malaysian companies:

- “Wilbur Willmore”, 52x11’ initiated by Spanish Company Edebé audiovisual is negotiating with Neon Pumpkin for a co-production deal
- “Oum le dauphin”, 52x13’ initiated by French Media Valley is discussing with SAMG for the executive production and with Inspidea in Malaysia
- Dutch Telescreen is in discussion with SAMG for “7cs”, Synergy Media for G_Fighters and DPQ for “Winky’s Flight Diary”
- Spanish Ink Apache is in discussion with Neon Pumpkin for a co-production deal for “Las Cuevas”
- Spanish Motion Pictures is in discussion with Neon Pumpkin for “Pumpkin Reports”
- French Denis Friedman Productions is in discussion for his feature film “Hyde” with Korean Guy Movie (work for hire) and Malaysian Inspidea for a co-production contract
- French Alphanim/Gaumont is discussing with Sunwoo and SAMG as well as Vooz for “Pigly”, “Bao Battle” 52x13’ and Lanfeust 26x22’. French company is also in negotiation for the co-production of “Clara & the Magic Dream Defenders” with Sunwoo. Alphanim/Gaumont has also concluded a distribution agreement for the international distribution of the programmes made by Iconix (Korea)
- Estonian company Eesti Joonisfilm is in discussion for the co-production of “The little train Choo Choo” with JM Animation
- German Fish Blowing Bubbles is in cooperation with Wonderworld, SAMG, Tuba, Synergy Media and DreamHans
- Luxemburgish Fabrique d’Images is in discussion for “Percy and His Friends” with Neon Pumkin (3D work for hire)
- French Studio100 is testing Neon Pumpkin, Sunny Island and Tuba for the series “Vic the Viking”, 78x13’

In the current period, in which broadcasters can invest less money, it is interesting for producers to be able to diversify their financing sources through international co-productions, for instance. Two noteworthy examples of the benefits of this cooperation are the feature films “Sammy’s Adventures” (by Belgian Director Ben Stassen) and “Thor” (Iceland). Each one had more than 1 million admissions in South Korea, which shows that there is a public in these countries for European animation.

CARTOON – European Association of Animation Film
Avenue Huart Hamoir 105
BE – 1030 Brussels
<http://www.cartoon-media.eu/CONNECT/index.php>

Source: CARTOON internal report

Annex 18: List of films co-produced with South Korea since 2005

Year	No. of Films	Title	Partner	Director	Main Cast
2005	5	<i>Seven Swords</i>	China / Japan / Hong Kong		So-yeon Kim
		<i>Seoul Raiders</i>	Hong Kong		
		<i>Sam'S Lake</i>	U.S. / Canada		
		<i>Loft</i>	Japan		
		<i>Love House</i>	U.S.	Pan-soo Kim	Sang-uk Park / Dong-hyeok Jo / Kyu-ryun An
2006	7	<i>One Missed Call Final</i>	Japan		Geun-suk Jang
		<i>The Restless</i>	China	Dong-oh Cho	
		<i>Battle of Wits</i>	China / Japan / Hong Kong	Chi Leung 'Jacob'/ Cheung	Sung-ki Ahn / Si-won Choi
		<i>Never Forever</i>	U.S.	Gina Kim	Jung-woo Ha
		<i>Daisy</i>	Hong Kong / The Netherlands		Woo-sung Jung / Ji-hyun Jun / Sung-jae Lee
		<i>26 Years Diary</i>	Japan		Tae-sung Lee
		<i>Don't look back</i>	Japan	Young-nam Kim	Tae-woo Kim / Hye na Kim/ Sang-woo Lee
2007	13	<i>Hero</i>	Japan		Byeng hyen Lee
		<i>Hanakake</i>	Japan	Hayato Kawai	Rae-won Kim / Jeong su Park
		<i>Fetish</i>	U.S.	Su-beom Son	Hye-kyo Song
		<i>Virgin Snow</i>	Japan	Sang-hee Han	Jun-ki Lee
		<i>The Assembly</i>	China / Hong Kong		
		<i>Chongqing</i>	China		
		<i>West 32nd</i>	U.S.		Jun-sung Kim / Jun-ho Jeoung
		<i>Like A Dragon</i>	Japan		
		<i>August Rush</i>	U.S.		
		<i>American Zombie</i>	U.S.		

		<i>Three Kingdoms-Resurrection of the Dragon</i>	China / Hong Kong		
		<i>Muoi: The Legend Of A Portrait</i>	Vietnam	Taekyoung Kim	An Jo / Ye-ryun Cha
		<i>Desert Dream</i>	Mongolian People's Republic / France	Zhang lu	Jung Suh / Dong-ho Shin
2008	9	<i>Let the Blue River Run</i>	China	Mi-ja Kang	Ye-ri Kim / Sun-ae Im
		<i>The Forbidden Kingdom</i>	China / U.S.		
		<i>Crossing</i>	China / Mongolian People's Republic	Tae-kyun Kim	In-pyo Cha / Myung-cheol Shin
		<i>The Good, The Bad, And The Weird</i>	China / Hong Kong		
		<i>Oishii Man</i>	Japan	Jeong-jung Kim	Min-ki Lee / Yu-mi Jeong
		<i>Dream</i>	Japan	Ki-duk Kim	Na-young Lee
		<i>Night And Day</i>	France	Sangsoo Hong	Young-ho Kim / Eun-hye Park / Soo-jung Hwang
		<i>Thirst</i>	U.S. / Australia	Chan-wook Park	Kang-ho Song / Ha-kyun Shin / Ok-vin Kim
		<i>Sunny</i>	Thailand	Joon-ik Lee	Ae Su / Jin-young Jung / Tae-woong Uhm
2009	11	<i>Restoration</i>	Israel	Jong-chul Kim	Documentary
		<i>A Good Rain Knows</i>	China	Jin-ho Hur	Woo-sung Jung
		<i>Haeundae</i>	U.S.	JK Youn	Kyung-gu Sul / Ji-won Ha / Joong-hoon Park
		<i>Higanjima</i>	Japan	Tae-kyun Kim	
		<i>Café Seoul</i>	Japan		Dong-wook Kim / Jung-hoon Kim
		<i>A Brand New Life</i>	France		Saeron Kim / Doyeon Park / A-sung Ko / Myung-sin Park
		<i>Sophie's Revenge</i>	China		Ji-sub So
		<i>The Boat</i>	Japan	Young-nam Kim	Jung-woo Ha
		<i>Dooman River</i>	China / France		

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		<i>Tokyo Taxi</i>	Japan	Tai-sik Kim	Ha-na You
		<i>A Million</i>	Australia	Mino Joe	Hae-il Park / Mina Shin / Hee-soon Park / Min-ki Lee / Yu-mi Jeong
2010	14	<i>The Yellow Sea</i>	China / U.S.	Hong-jin Na	Jung-woo Ha / Yoon-seok Kim / Sung-ha Cho
		<i>Detective Dee and the Mystery of the Phantom Flame</i>	China / Hong Kong		
		<i>Warrior's Way</i>	India / U.S. / New Zealand	Seung-moo Lee	Dong-gun Jang
		<i>Sayonara Itsuka</i>	Thailand / Japan	John H. Lee	
		<i>A Better Tomorrow</i>	Thailand / Japan / Hong Kong	Hae-sung Song	Jin-mo Joo / Seung-heon Song / Gang-woo Kim / Han-sun Jo
		<i>A Barefoot Dream</i>	Indonesia / Japan	Tae-kyun Kim	Hee-soon Park / Chang-seok Go
		<i>Late Autumn</i>	U.S. / Hong Kong	Tae-yong Kim	Bin Hyun
		<i>Hearty Paws2</i>	China	Jung-chul Lee	Dalee / Dong-il Seong / Jung-tae Kim / Joong-ki Song
		<i>The Last Godfather</i>	U.S.	Hyung-rae Shim	Hyung-rae Shim
		<i>After Shock</i>	China		
		<i>Finding Mr. Destiny</i>	India	You-jeong Chang	Soo-jung Lim / Yoo Gong / Ho-jin Chun / Soo-kyung Jeon / Seung-soo Ryu
		<i>Golden Slumber</i>	Japan		
		<i>Ghost: In Your Arms Again</i>	Japan		Seung-heon Song
		<i>Reign of Assassins</i>	China		Woo-sung Jung
2011	1	<i>Hype Nation</i>	U.S.		Jay Park
Total	60				

Source: <http://www.koreanfilm.or.kr/jsp/coProduction/productionCaseList.jsp?pageIndex=1> (accessed on 6 November 2012)

