

Key success factors of Korean TV industry structure that leads to the popularity of Korean TV dramas in a global market

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บทคัดย่อ

“ฮันริว” เป็นชื่อที่ใช้เรียกปรากฏการณ์ความนิยมวัฒนธรรมกระแสนิยมของประเทศเกาหลีใต้ซึ่งเกิดขึ้นในหลายประเทศโดยเฉพาะประเทศในแถบเอเชีย ปรากฏการณ์นี้เริ่มจากความนิยมในสื่อทางวัฒนธรรมของประเทศเกาหลี อาทิ ละครทีวี ภาพยนตร์ และดนตรีป๊อบ ละครทีวีเกาหลีที่มีชื่อเสียงโด่งดัง เช่น เพลงรักในสายลมหนาว (Winter Sonata) แดจังกึม จอมนางแห่งวังหลวง (Jewel in the palace) และละครรักที่ปักใจ (Full House) มีส่วนทำให้นักท่องเที่ยวข้ามแดนทางไปยังประเทศเกาหลีใต้นำรายได้นับพันล้านเข้าสู่ประเทศ และที่สำคัญที่สุด สร้างให้เกิดเอกลักษณ์ของชาติเกาหลีในสายตาของคนทั่วโลก

เมื่อเปรียบเทียบกับประเทศเกาหลีแล้ว ประเทศไทยเองก็มีการส่งออกละครทีวีไปยังต่างประเทศ โดยเฉพาะประเทศในแถบเอเชียตะวันออกเฉียงใต้ เช่น กัมพูชา ลาว และเวียดนาม อย่างไรก็ตาม ประเทศไทยไม่เคยได้รับความสำเร็จจากธุรกิจบันเทิงในระดับนานาชาติเชิงเช่นเดียวกับที่ประเทศเกาหลีใต้ได้รับ ดังนั้นผู้วิจัยจึงสนใจที่ทำการศึกษาวิจัยในประเทศเกาหลี ด้วยจุดประสงค์ที่จะนำอุตสาหกรรมโทรทัศน์ของประเทศเกาหลี มาเป็นต้นแบบในการใช้ละครโทรทัศน์เพื่อเพิ่มมูลค่าทางเศรษฐกิจและเผยแพร่วัฒนธรรมของประเทศไทย

ทั้งนี้แม้ว่าความนิยมของละครทีวีจากประเทศเกาหลีจะเกิดขึ้นจากหลายปัจจัยวัตถุประสงค์หลักของการวิจัยครั้งนี้คือการศึกษาค้นคว้าโครงสร้างอุตสาหกรรมโทรทัศน์ของประเทศเกาหลีเพื่อหาปัจจัยความสำเร็จที่ส่งผลต่อความสำเร็จของละครเกาหลีในตลาดสากล การวิจัยมุ่งเน้นที่สื่อคาบเกี่ยวของอุตสาหกรรมโทรทัศน์ของประเทศเกาหลีได้แก่ รัฐบาล สถานีโทรทัศน์ บริษัทผู้ผลิต

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และผู้สร้างสรรคัละครที่วี ระเบียบวิธีวิจัยที่ใช้คือ การใช้ข้อมูลทุติยภูมิ การสังเกตรายการโทรทัศน์ของ ประเทศเกาหลี และการสัมภาษณ์ผู้ที่อยู่ในอุตสาหกรรมโทรทัศน์ของประเทศเกาหลีในส่วนต่างๆ นอกจากนี้งานวิจัยชิ้นนี้ยังกล่าวถึงอุปสรรคและโอกาสสำหรับอุตสาหกรรมโทรทัศน์ของประเทศ เกาหลีในช่วงอนาคตอันใกล้ โดยได้สรุปข้อเสนอแนะสำหรับอุตสาหกรรมโทรทัศน์ของประเทศไทยใน การส่งออกละครโทรทัศน์ไปยังตลาดต่างประเทศรวมอยู่ในบทความวิจัยชิ้นนี้ด้วย

คำสำคัญ: ฮันริว ละครโทรทัศน์เกาหลี ปัจจัยความสำเร็จ โครงสร้างอุตสาหกรรมโทรทัศน์
ตลาดสากล

Abstract

“Hallyu” is the phenomenon called for the popularity of South Korean pop culture in other countries, especially Asian countries. It starts from the popularity of Korean cultural media, such as TV dramas, movies, and pop music. The famous Korean TV dramas; for example, “*Winter Sonata*”, “*Jewel in the palace*”, and “*Full House*” make million of tourists come to visit South Korea, bringing a billion of revenue to the country, and, most importantly, encouraging Korean national image in the whole world.

Comparing to Korea, Thailand, also exports TV dramas to other countries, especially Southeast Asian countries like Cambodia, Laos and Vietnam. However, Thailand has not been as internationally and widely successful with its entertainment business as Korea and its cultural entertainment products. Therefore, the researcher decided to conduct a research in South Korea because believe that Korean TV industry can be a model for Thailand for using TV dramas as a tool to increase the economic value and disseminate our own culture.

Although the popularity of Korean TV dramas comes from several factors, the main objective of this research is to study Korean TV industry structure in order to find the key success factors which affect a success of Korean TV dramas in global market. The research focuses on four bodies of Korean TV industry structure: Government, TV stations, Production companies and TV dramas creators. A methodology is conducted by finding secondary data, observing TV programs and interviewing people who work in Korean TV industry. Moreover, this research also mentions about Threats and Opportunities for Korean TV industry that is coming in the near future. Finally, the suggestion for Thai TV industry, focusing on exporting Thai TV dramas in the global market, is also proposed.

Keywords: Hallyu Korean Television Dramas Key Success Factors
Television Industry Structure Global Market

1. Background

Television drama is one of the cultural products, which has high impact among audiences. This statement can be proven by a phenomenon of “Korean wave” which is the name given to the increasing popularity of Korean popular culture including Korean TV dramas such as *Winter Sonata*, *Dae Jang-Geum* and *Full House* that have gained millions of fans among many countries in Asia. The Korean Wave is otherwise known as “Hallyu” which is a Chinese pun that also translates directly into Korean. Both “cold current” and “Korean wave” are pronounced “han-liu” (or “hanryu” or “halryu” in Korean).¹ Hallyu has brought increased interest in and favorable disposition towards Korean popular culture, such as TV drama, movie, and music. Currently, the preference of Korean culture has expanded from merely popular culture to Korean lifestyles in general, including food, fashion, tourism (to film locations) and sports.²

Compared to South Korea, Thai television dramas have also been broadcast for many years in neighboring countries such as Laos, Cambodia, Vietnam and China. Still, Thailand has not been as internationally and widely successful with its entertainment business as Korea and its cultural entertainment products. Therefore, I wonder what the relevant factors that make Korean TV dramas succeed in a global market are.

This quarry drove me to conduct research focusing on key success factors of Korean TV industry structure with a full support from Korean National University of Arts, Ministry of Culture and Tourism, Republic of Korea. During my five-month research fellowship to South Korea (September 2006 – January 2007), I intend to figure out what “Behind the Scene” of Korean TV dramas’ success is as well as to find the way to strengthen the competencies of Thai TV industry in a global stage.

¹Wikipedia, “Korean wave,” <http://en.wikipedia.org/wiki/Korean_wave>, no date.

²<www2.hawaii.edu/~sukj/Koreanwave/hallyu.htm>

2. Research Objectives

- 2.1 To study the Korean TV industry structure
- 2.2 To analyze the key success factors of Korean TV industry in a global market
- 2.3 To use Korean TV industry as a benchmark for Thai TV industry, especially for exporting Thai TV dramas in a global market

3. Research Scope

- 3.1 This research focuses on four major bodies of Korean TV industry structure including the following:
 - Government
 - Television stations
 - Production companies
 - Television drama creators
- 3.2 The research scope is limited to Korean TV programs and TV popularity rating during September 2006 – January 2007
- 3.3 The researcher focuses on TV dramas and TV industry of Republic of Korea (South Korea). This study does not involve with TV dramas and TV industry of The Democratic

People Republic of Korea (North Korea).

4. Definition of Terms

Key success factors refers to the factors which have positive effects towards Korean TV dramas in the global market

Korean TV dramas refer to television content that is scripted and fictional. In this study, it implies with mini-series, serial stories produced in Korean language in limited episodes, which are popular in Korea and other countries.

Korean TV industry structure refers to a segment of economy concerned with production and broadcasting of television programs. In this study, it implies with organizations that play major role in television broadcasting system including government, TV stations, production companies and TV drama creators

Global market refers to broadcasting industry all over the world, especially Asian broadcasting industry that is a main market for exporting Korean TV dramas.

5. Literature Context

5.1 An overview of Korean TV industry

The era of Korean television broadcasting began on May 12, 1956, when HLKZTV, A cornerstone in the foundation of the future KBS-TV, was established as a commercial television broadcast station.³ However, during the 1960s, the influence of television broadcasting was still insignificant due to a poor distribution rate of television sets.⁴

During 1960s, two commercial broadcasting stations were established. Tong Yang Television Company (TBC-TV), the first commercial stations in Korea was founded in 1964. The second commercial television system, Munwha Broadcasting Company (MBC-TV) made its debut in 1969. TBC-TV remained a major competitor of KBS-TV until it was absorbed by KBS-TV in 1980.

At the same time, the government adopted new ways to finance its broadcasting, charging a compulsory fee

to owners of registered sets and establishing a commercial rate for advertisers. However, criticism arose concerning the financing system of KBS, the state-run broadcasting system, which depended on the reception fees from the viewers as well as commercial revenues from the advertisers. In response to the criticisms, KBS decided to discontinue advertising broadcasting on May 5, 1969.

Since KBS-TV discontinued commercial broadcasting, there was fierce competition between the two commercial broadcasting stations to attract advertisers. After 1969, a heavy dose of entertainment programming inundated television schedules. Melodramatic programming dominated the prime-time slot and produced fierce ratings competition among the three networks. This entertainment-oriented strategy resulted in the deterioration of programming standards.⁵

The early 1970s (1973-1974) were characterized as a flourishing period of television dramas. For example, TBC broadcast a total of seven serial dramas including 45-minute daily dramas. The

³ Kyu Kim and others, "An overview of television programming in Korea," in *Broadcasting in Korea*, (Seoul, Korea: Nanam Publishing House, 1994), p. 48.

⁴ *Ibid.*, p.50.

⁵ *Ibid.*, p. 102-104.

three television networks broadcast about 15 dramas everyday. As a result of the competition among networks for rating and commercial revenue, an abundance of “low taste” programs hit the airwaves. And, public opinion was critical of those programs. Therefore, on February 16, 1973, The Korean government revised the Broadcasting Law of 1963 under the pretext of improving the quality of programming.

As a result of this revision, KBS was transformed into a public broadcasting corporation. A main provision of the revised law required television stations to allocate at least 30 percent of their broadcasting hours to cultural and educational programming. As a result, there was a substantial cutback of entertainment programming and an increase in educational-oriented and cultural programming intended to reinforce Korea's identity.

KBS-TV absorbed TBC-TV and obtained the majority shares (65 percent) of MBC. In effect, all of the nation's broadcasting systems were put under the control of KBS. Although the government argued that its action was taken as a result

of growing public criticism of broadcasting media practices, many accused the government of wanting to establish a monopoly over television broadcasting.

At first the new system seemed to work, but it lacked a clear purpose and failed to gain public support. This system came to resemble the old commercial television system, except that the government did not allow television stations to produce news and public affairs critical of or potentially embarrassing to the government.⁶

Moreover, with the Broadcasting Law of 1987, the Korean Broadcasting Committee was established to oversee all broadcasting in the country. The most important feature of this law was that it guaranteed freedom of broadcasting. However, one of its main provisions required that television allocate at least 10 percent of their broadcasting hours to news programming, 40 percent to cultural/educational programming and 20 percent to entertainment programming.⁷

⁶*Ibid.*, p.104-105.

⁷*Ibid.*, p. 105-107.

On August 1990, the government decided to set up a working committee for the establishment of a second commercial television network. The government ended the 27-year-long freeze on new commercial television licenses by granting a license to the Seoul Broadcasting System (SBS-TV) on December 15, 1990. This breakthrough paved the way for competition between the public and the private networks.

The establishment of SBS brought changes in broadcasting environment. The private broadcasting system was viewed as a paying business with an efficient management structure and a possibility of tremendous profits from commercials. Under these circumstances, the role of broadcasting serving the public interest and its impartiality had to be set aside as a secondary value.

Moreover, the opening of SBS brought about the improvement of treatment for entertainers largely due to the recruitment efforts of SBS competing the existing broadcasting networks. Another technological breakthrough took place in the beginning of the 1990s with the introduction of cable television service. In other words, the coexistence of private and

public broadcasting brought more intensified competition among the whole population of broadcasters.⁸

Since year 2000, another exciting era of Korean television emerges. Korean broadcasters' targets are not only local but also global audiences. The success of several Korean TV dramas, such as *Autumn in my heart* (KBS, 2000) and *Winter Sonata* (KBS, 2002) leads to what we call "Korean wave".

In March 2004, in order to expand Korean culture through its global network, KBS has set up and initiated its global vision and construction the KBS Global Center. MBC also enlarged marketing department in order respond with foreign markets. There is still a substantial demand for Korean TV programs, especially Korean TV dramas.

5.2 An overview of Korean TV dramas

Overall, television drama in Korea can be divided into three main segments. The first segment is **Morning Dramas**, which have the broadcasting time from 7.50 –9.00 a.m. Most of them are on-air

⁸ *Ibid*, p. 107-108.

from Monday to Friday and have housewives as the target audience. The second segment is **Evening Dramas**, which are on-air around 4.05 – 8.55 p.m. (16.05 – 20.55 hrs). Target groups of the evening dramas are housewives and family. Therefore, situation comedies and family dramas are shown during this time. The last segment is **Prime-time Dramas**, which are

broadcast around 9.55 –10.55 p.m. (21.55 - 22.55 hrs). This kind of dramas gains the highest popularity among the audiences. And it is also the big resource of Korean TV dramas that are exported to a global market.

5.3 Korean TV dramas that play major role in Korean Wave phenomenon

“*Autumn in my heart*” (also known as “Autumn Fairly Tale” and “Fall Legend”)

Figure 1 Korean TV drama: “*Autumn in my heart*”



* The pictures above are provided by KBS. Copyright KBS. All Rights Reserved.

This TV drama directed by Yoon Seok-ho, broadcasted by KBS television in year 2000, is a starting point of Korean TV dramas' international popularity. It is not overstated to claim that *Autumn in my heart* is a first water-drop of Korean wave.

After the success of *Autumn in my heart*, Yoon Seok-ho had an inspiration to

create sequels of his drama with theme based on four seasons of Korea; Autumn, Winter, Summer and Spring. The results are three following TV dramas, *Winter Sonata* (2002), *Summer Scent* (2003) and *Spring Waltz* (2006).

“Winter Sonata” (also known as “Winter Love Song”)

Figure 2 Korean TV drama: “Winter Sonata”



* The pictures above are provided by KBS. Copyright KBS. All Rights Reserved.

Winter Sonata is one of the most successful TV dramas in Korean history. *Winter Sonata* has created the obsession of Japanese women towards Bae-Yong Joon (or, Yonsama in Japanese), the leading actor of this drama. The effect of *Winter Sonata* widely spread, from television to tourism, from culture to economics.

Dai-Ichi Life Research Institute of Japan has announced recently that the economic effect of “Yonsama” Bae Yong-joon and the miniseries “Winter Sonata” has reached 230 billion yen, or 2.3 trillion won in Japan and Korea. The revenue comes from the overwhelming demand to visit the ski resorts and hotels featured in Winter

Sonata, the popularity of Korean souvenirs and other indirect economics effects.⁹

According to Lee Hyang-Chul, professor of Japanese studies at Kwang Woon University in Seoul, Fans of *Winter Sonata* are women in their 40s and 50s, the age group that has the most discriminating attitude towards Korea. They saw negative aspects like the war and periods of dictatorship. But, now their attitudes are changing and they are looking at Korea

⁹ KBS, “Effects of ‘Winter Sonata’ and Yonsama frenzy on economy,”

<http://contents.kbs.co.kr/board/notice_view.php?id=48&code=2&board_name=notice&boardjob=VI
EW&page=2&keyname=&keyword=&code=2>, 22
December 2004.

differently.¹⁰ Today, even Japanese textbook Bae, Yong-joon under the title, 'Korean life for high school students featured and culture & Japan'.¹¹

"Jewel in the palace", produced by MBC (Munhwa Broadcasting Corporation) (also known as Dae Jang-Geum)

Figure 3 Korean TV drama: "Jewel in the palace" (Dae Jang-Geum)



Source: <http://times.hankooki.com/lpage/culture/200601/kt2006011616582311690.htm>

¹⁰ Anna Fifield, "South Korea's soppy soaps win hearts across Asia," Financial Times, <http://contents.kbs.co.kr/board/notice_view.php?id=50&code=2&board_name=notice&boardjob=VIEW&page=1&keyname=&keyword=&code=2>, 14 December 2004.

¹¹ KOCCA, "Japanese textbook features 'Yonsama'," KOCCA newsletter 181, <http://www.koreacontent.org/common/print_en.html>, 31 March 2006.

Jewel in the palace is another TV drama that highly affects on Korean tourism industry. This drama based on a true story about a legendary girl (Jang-Geum) who lived during the time of Choson dynasty, when Korea had a rigid hierarchy and male dominated social structure. But Jang-Geum, using her talent and merit, became the first woman to be the royal physician of the King. Because the TV drama's setting is in Korean history, the storyline is open to show many Korean cultural heritages such as cuisine, herbal medicine, and traditional custom. Comparing with *Winter Sonata*, *Dae Jang-Geum* may not cause frenzy effect among female audiences like "Yonsama syndrome". But, it can capture wider target audiences than *Winter Sonata*.

After this TV drama was exported to 17 countries, including Arab and European market, MBC decided to keep drama's location setting to be "Dae Jang-Geum Theme Park" for the tourists who would like to get more experience about their favorite TV drama.

5.4 Reasons of the popularity of Korean Television Dramas:

After reviewing articles and interviewing people working in Korean TV industry, the researcher concludes that Korean TV dramas' popularity comes from the following reasons:

1) Right Place and Right Time

Japan is always the leading country who produces the popular culture in Asia and the rest of the world. However, because the political relationship between China and Japan went worse in the 1990s, Chinese started to disclaim Japan and its culture. Moreover, since Japanese culture became too westernized, audiences do not feel that they can relate themselves with Japanese cultural products.¹² That is why Korean TV dramas come at a right place and a right time when audiences want to find something, which is different from Japanese culture and western culture.

¹² <www2.hawaii.edu/~sukj/Koreanwave/hallyu.htm>

2) Balance Between Modernism and Traditionalism

According to an article “Cultural contact with Japanese TV dramas: Modes of reception and narrative transparency” written by Dong-Hoo Lee, it claimed that a root of several Korean popular TV dramas came from Japanese TV dramas called “Trendy drama”. These dramas are emerged to meet the need of young generation during the late 1980s to the early 1990s.

However, Korean directors try to create their TV dramas in a Korean socio-cultural landscape with balancing between modernism and traditionalism. For example, comparing between Japanese TV drama “*Tokyo Love Story*” (Fuji TV, 1991) and Korean TV drama “*Jealousy*” (MBC, 1992), both of them have similar subject matters and main characters. While in *Tokyo Love Story* young lovers sleep or live together, in *Jealousy* premarital sexual purity is maintained. Lovers just kiss and hug. Moreover, in *Tokyo Love Story*, family is absent

from the space of love between woman and man. In contrast, *Jealousy* still showed a relationship between mother and daughter and maintained family issue in its content.¹³

At the conclusion, Korean TV dramas try to negotiate between a new life style and an old culture value. That is why Korean TV dramas can serve the needs of Asian audiences who live in the modern societies but cannot ignore their own tradition.

3) Cinderella story

An attractive story is a simple explanation for Korean TV dramas’ popularity. Even Kim Yun-chul, Director of “My lovely Kim Sam-soon” and Harrison Yu, General Manager of Korean Broadcasting Institute, also mentioned about the

¹³ Dong-Hong Lee, “Cultural Contact with Japanese TV dramas: modes of reception and narrative transparency, ” in Feeling Asian Modernities: Transnational consumption of Japanese TV dramas, ed. Koichi Iwabuchi (Hong Kong: Hong Kong University Press), 2004, p. 269

scriptwriting as a key success factor of Korean TV dramas. Mr. Boo-sung, General Manager of Marketing Department, Olive Nine Co., Ltd, argued that Korean TV dramas story is like Cinderella story. It is simple. But, usually, there are main characters that audiences get pity of and want to see their happy-ending.¹⁴ Additionally, because target audiences of TV dramas are women, seeing a female character win the entire struggle and live happily with her man also satisfied their need. They can relate themselves with the whole story or even wish their live would be the same.

4) Asian moral value

Korean society is based on Confucianism, which is a culture root of China and Japan as well. As a result, a Korean TV drama like Dae Jang-Geum, which displays Ethics, Values from Confucianism, has

fulfilled the empty feeling of people in a materialistic era. We can see how the moral value shown in Korean TV dramas affects other countries in the following statement:

“Flowing naturally like water, hallyu is a peaceful link bridging together the three countries of Korea, China and Japan in Northeast Asia, where confrontation due to nationalism and historical relations remains a serious concern. As such it provides freshness to Southeast Asian countries, which have been uncomfortable with long-held antagonism toward Japan; meaningfulness to the seemingly materialistic and pleasure-seeking cultures of Singapore and Hong Kong, the most affluent areas in the region; and cultural harmony in contrast to Chinese hegemony.”¹⁵

¹⁴ Interview with Boo-Sung, Choung, General Manager/ Marketing Department, Olive Nine Co., Ltd., 29th November 2006

¹⁵ Kim Dae Sung, “Hallyu: How far has it come?,” *Korea Foundation newsletter* 14, <<http://newsletter.kf.or.kr/English/contents.asp?vol=58&sec=11&lang=English&no=634>>, November 2005.

5) Good looking actors and actresses with sensible acting and expression

Mrs. Haewon Chin, Senior Marketing Officer of MBC TV station thought that the gorgeous look of Korean actors and actresses is the main reason of Korean TV drama popularity.¹⁶ Additionally, Korean TV stars can act very well with a sensible expression. In a tragic scene, both actors and actresses can cry to express their painful feeling. This kind of acting may be judged as over-acting. But, it can get along with a whole melodrama story that needs a lot of emotion and sensibility.

6) High production quality

The Korean broadcasting industry became fully equipped with modern television technologies in the late of

1980s and early 1990s.¹⁷ The success of TV dramas also draws investors and higher budgets. Even technology-oriented companies such as KT Company also decided to invest in drama production companies. The higher budget Korea production companies have, the higher production quality of Korean TV dramas they can produce. And this leads to higher competency of Korean TV dramas in a global market as well.

7) Low cost

Comparing with cost of Japanese dramas, Korean TV dramas are better choices for local TV stations. Its cost is ranged 1,000 – 20,000 USD per 1 episode, depending on the imported country.

¹⁶ Interview with Haewon Chin, Senior marketing officer, MBC, 1st November 2006.

¹⁷ Dong-Hong Lee, "Cultural Contact with Japanese TV dramas: modes of reception and narrative transparency," in Feeling Asian Modernities: Transnational consumption of Japanese TV dramas, ed. Koichi Iwabuchi (Hong Kong: Hong Kong University Press, 2004), p. 264.

Table 1 Standard prices for MBC TV dramas in global market

Country	Price (per 1 episode)
Japan	20,000 –100,000 USD
Taiwan	20,000 USD
Thailand and Malaysia	4,000-8,000 USD
Vietnam	1,000 USD

Source: Interview with Haewon Chin, Senior marketing officer, MBC, 1st

November 2006

In several countries, Korean TV dramas' price is lower than the cost of local TV programs. And it can guarantee the level of popularity rating as well. That is no wonder why there is still a demand for Korean TV drama in a global market.

8) Well-structured television industry

The last reason is an assumption of this research. It comes from the fact that the success of one TV dramas may be the result of a good director, producer or scriptwriter. But the success of whole industry, like Korean TV industry did, should come from the efficiency and

effectiveness of every segment in the industry.

6. Research Methodology

This research is qualitative research which uses an in-dept interview as a major data collection tool. The research process includes the following:

- 1.) Search initial information from the secondary data such as articles, documents and website of related organizations
- 2.) Observing TV programs from the main Korean TV stations
- 3.) In-depth interview people who work in Korean TV industry

- 4.) Analyze and summarize the key success factors of Korean TV industry that leads to the success of Korean TV dramas in a global market.
- 5.) Analyze and summarize threats and opportunities of Korean TV industry structure
- 6.) Summarize a conclusion and a suggestion for the future of Thai TV industry in a global market
- 1.) **Government:** Ministry of Culture and Tourism (MCT) and Korean Broadcasting Institute (KBI)
- 2.) **TV stations:** Munhwa Broadcasting Corporation (MBC)
- 3.) **Production companies:** Olive Nine Co.,Ltd.
- 4.) **Television drama creators:** Director, Producer and Scriptwriter of Korean TV drama "My lovely Kim Sam-soon"

7. Conceptual framework

Moreover, the researcher uses purposive sampling to select the target samples in each body of Korean TV industry as the following:

In order to demonstrate Korean TV industry, the researcher expresses the conceptual framework of this research as the following diagram:

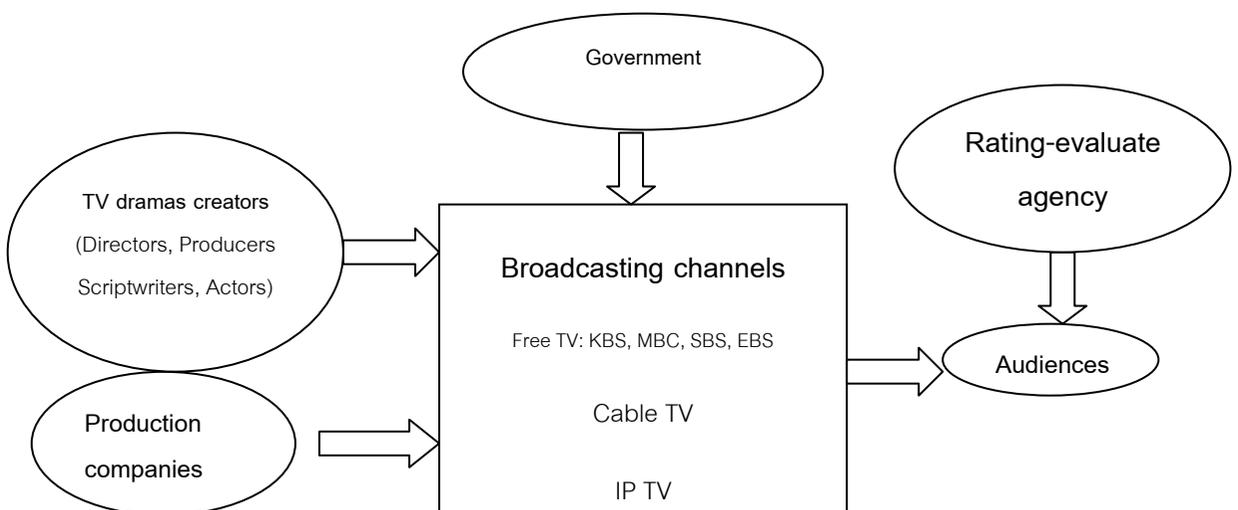


Figure 4 Conceptual Framework of Television Structure in Korea

There are six major bodies of TV industry structure: Government, Broadcasting Channels, Production companies, TV dramas creators, rating-evaluate agent companies and TV audiences. However, in order to study the key success factors and key risk factors of Korean TV industry, this research will focus on only four bodies: **Government, Broadcasting channel (focus on free TV stations), Production companies, and TV drama creators.**

8. Research finding

8.1 Key success factors of government organizations related with TV industries

1) Changing organization according to changing environment

Analyzing Ministry of Culture and Tourism, Republic of Korea, government, the researcher found that there were several major changes in the organization structure as the following table.

Table 2 History of Ministry of Culture and Tourism (MCT)

Year	Historical events
1968	The Ministry of Information was replaced by the Ministry of Culture and Information and, finally, the newly born agency came to control all the cultural and arts affairs in Korea.
1990	The Ministry of Culture was set up. With the advent of the new Ministry of Culture, printing, broadcasting and other mass-media related affairs were transferred to the Ministry of Information.
1993	The Ministry of Sports and Youth, and the Ministry of Culture were integrated into the Ministry of Culture and Sports .
1994	The Ministry of Culture and Sports expanded to incorporate tourism affairs that had been under the control of the Ministry of Transportation.
1998	The Ministry of Culture and Sports was replaced by the Ministry of Culture and Tourism , and began handling affairs relating to the print and broadcast media, which had been the responsibility of the former Ministry of Information.
2004	The Ministry of Culture and Tourism, with the aim of strengthening the functions of cultural and art education, divided the Culture Industry Bureau and Culture Media Bureau .

Source: http://www.mct.go.kr/english/section/about_mct/history.jsp

From **Ministry of Culture and Information** in 1968 to **Ministry of Culture** in 1990 to **Ministry of Culture and Sports** in 1993 and, finally, it becomes **Ministry of Culture and Tourism** in 1998.

These changes do not occurred independently. But the Ministry itself was changed according to the changing environment. In 1993, after cultural affairs became more related with tourism industry, the cultural affairs were changed to be the subsidy of Ministry of Culture and Tourism. And, it also set up “**Culture Industry Bureau**” and “**Culture Media Bureau**” in 2004 in order to respond with the popularity of Korean wave.

2) Focusing on research and development

Another government organization related with Korean TV industry is “Korean Broadcasting Institute” (KBI). One of the missions of Korean Broadcasting Institute is collecting historical database, which is important for broadcasting industry. Examples of the data that KBI collects include annual report of Korean Broadcasting Companies, market sizes,

policies and strategic achievement.¹⁸ The data that KBI collects come from not only the local but also international database. And publications and database of KBI can be borrowed through broadcasting library or searched through KBI web as well. Therefore, Korean broadcaster can know up-to-date information of global broadcasting industries. It is a key factor that make Korean broadcaster can adapt with the changing business environment and media technologies.

3) Realizing the importance of human resources

KBI tries to encourage human resources development for Korean broadcasting industry. For examples, there are courses for working professionals (36 courses for 407 people in 2002) and courses for prospective broadcasting personnel (workshops on program production for university students).¹⁹ This can make sure that Korean broadcasting

¹⁸ Korean Broadcasting Institute, “Research and survey on broadcasting and media,” <http://kbi.re.kr/english/about_page3_1.html>, no date.

¹⁹ Korean Broadcasting Institute, “Broadcasting personnel development,” <http://www.kbi.re.kr/english/about_page3_2.html>, no date.

industry will have abundant of skillful and talent human resources in the future.

4) Initiating corporation between academic scholars and working professionals.

KBI has provided open forms for the development of TV programs by contributing special articles, papers, and broadcasting-related criticisms, and played a mediating role between scholars and working professionals through the introduction of academic theories and the views of experts.

Moreover, there are workshops on program production for university students. This factor enables to create educational system with balance between practical skill and theoretical foundation.

5) Financial support

KBI has various financial support systems for program production to enable producers to make competitive, creative programs with cultural merit and distinction in this era of open broadcasting, using the broadcasting promotion fund and the cultural industry promotion fund. It even guaranteed the distribution and supply of the distinguished programs, including dubbing into foreign languages and catalogue production, to actively encourage local TV programs' advancement into foreign markets. (Financial support in 2002: one billion won for 19 programs.)²⁰

8.2 Key success factors of Television stations

²⁰ Korean Broadcasting Institute, "Financial support,"

<http://www.kbi.re.kr/english/about_page3_7.html>, no date.

Table 3 Broadcasting stations in Korea

Broadcasting Station	Channel	TV	Radio
Public	Korean Broadcasting System (KBS) 25 local stations	KBS 1 KBS 2 Satellite 1 Satellite 2	1R,2R,3R 1FM,2FM Socail Educational Radio Korea Int'l
	Munhwa Broadcasting Corporation (MBC) 19 local stations	MBC TV	MBC AM MBC FM
Commercial	Korean Educational Broadcasting System (EBS)	EBS TV Satellite 1 Satellite 2	EBS FM
	Seoul Broadcasting System (SBS)	SBS TV	SBS AM SBS FM
	Chongju Broadcasting Company (CJB)	CJB TV	
	Jeonju Television Corporation (JTV)	JTV	
	Kwangju Broadcasting Company (KBC)	KBC TV	KBC FM
	Kyonggi Broadcasting (KFM)		KFM
	Kyungin Broadcasting (iTV)	iTV	
	Pusan Broadcasting Corporation (PSB)	PSB TV	PSB FM
	Taegu Broadcasting Corporation (TBC)	TBC TV	TBC FM
	Taejon Broadcasting Company (TJB)	TJB TV	TJB FM
Ulsan Broadcasting Corporation (UBC)	UBC TV		

Source: <http://www.kbi.re.kr/english/broadcasting.html>

1) Oligopoly nature

According to Professor Kim Yun-chul, director and producer of “My lovely Kim Sam-Soon”, there are three main players in TV drama market, KBS, MBC and SBS. Therefore, the stations are under the market which is dominated by a small number of firms. The decisions of one firm influence and are influenced by the decisions of other firms. With the high competition in an oligopoly market, each station has to produce new attractive TV dramas in order to gain popularity among audiences. That is why Korean TV dramas can attract not only local but also international TV audiences. Professor Kim Yun-chul also predicted that if the competition in Korean TV drama business still was like this, Korean TV dramas could sustain the popularity in global market around 3-5 years.

2) Creditable rating system

There are two main rating agent companies in Korea, TNS media and Nielsen. According to the interviews, people working in Korean TV industry quite trust in rating-evaluate system. Figures from two companies are not the same but do not

have a significant difference.²¹ Therefore, TV stations know quite well what kind of TV dramas the market wants, although they do not have marketing research process.

3) Copyright owner

According to Mr. Boo-Sung, general manager of marketing department, Olive Nine Co., Ltd., 80% of TV drama copyrights belong to TV stations. This factor makes TV stations be able to sell broadcasting right in other countries. Therefore, there is a chance for making profit not only in local but also international markets as well.

4) Outsource production teams

KBS, MBC and SBS usually use freelance system. Producers, directors and production companies are outsourcing. Even main actors and actresses do not sign contract with TV stations. With this system, TV stations can reduce fixed costs. But, they cannot ensure that producers, directors or actors who used to create popular TV dramas will

²¹ Interview with Haewon Chin, Senior marketing officer, MBC, 1st November 2006.

continue to produce successful TV dramas with their stations. Even producers and directors who are permanent staffs tend to leave TV stations after they are famous. As a result, there is no a strong commitment between TV stations and production crew.

²²

5) Marketing strategies

For high competitive products, TV stations do not need to promote or use marketing strategies. Korean TV dramas, which are successful in Korea, have a huge demand in the global market. Sometimes, agent companies decide to buy TV drama when the production does not yet finishes because they think the cast or the synopsis are interesting.

Nevertheless, TV stations have to give marketing supports for low competitive products. The strategy that TV stations often use is international exhibition, for example, international TV market exhibitions in Hong Kong, France, Singapore and Korea. Usually, part of exhibition or traveling expenses will be

supported by Korean government. After selling the dramas, TV stations will use commercial and invite TV stars to promote in other countries. However, sometimes, it is difficult for TV stations to ask TV stars joining the promotion campaign because most of stars have their own managers or sign contract with agent companies.²³

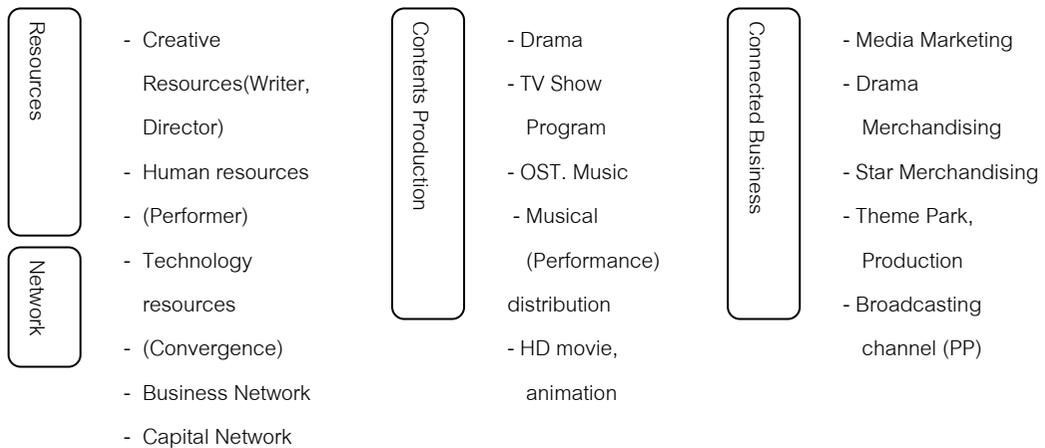
8.3 Key Success Factors of Production companies

Most of popular prime-time TV dramas in Korea are produced by outsource production companies. Therefore, there are a lot of freelance production companies in Korea. However, the researcher chose Olivenine Co.,Ltd as a sampling target of this study because Olivenine is a big company which produced well known TV dramas such as Jumong (MBC, 2006) and Hwangjinyi (KBS, 2006). Moreover, the recent merger between Olivenine and KT company is also a model of synergy between content company and telecommunication company as well.

²² Interview with Haewon Chin, Senior marketing officer, MBC, 1st November 2006.

²³ *Ibid.*

Figure 5 Olivenine Co.,Ltd. 's business units



1) Variety of broadcasting channels

Because, nowadays, there are a variety of broadcasting channels in Korea, production companies are not limited to produce TV dramas for only free TV channel. They can produce TV dramas for cable TV and IP TV, which are new media trends. Even marketing officer of MBC, Mrs. Haewon mentioned that cable TV could be a competitor for free TV because it could give more preferable offer to the production companies. As I noticed, one production company can work with all of three TV stations. For example, Olive Nine, it produced “Jumong” for MBC, “Hwang-Jin-Yi” for KBS and “Lover in Prague” for SBS. Therefore, production companies have a

high bargaining power to choose the condition of work that they prefer.

2) Economy of scope

Economy of scope primarily refers to efficiencies associated with demand-sided changes such as increasing or decreasing scope of marketing and distribution. Regarding the economy of scope, Olive Nine is established in order to produce TV programs, but it extends its business scope to other media services such as performer management, Theme Park and brand merchandising. Therefore, the cost that Olive Nine spends is not allocated to only TV drama. But, it is shared among several services that Olive Nine

provides which cause the higher distributing and marketing efficiency and create the synergy between the completed rang of products. So, the overall cost of Olive Nine can be reduced. In business term, Olive Nine utilizes the Economy of Scope.

3) Product line of TV dramas

Another key success factor of Korean production companies is the fact that they can raise the profit from not only TV dramas program but also TV drama product lines. For example, during *Hwang-Jin-Yi*, a famous TV drama broadcasted by KBS, was on-air; Olive Nine launched branding products of *Hwang-Jin-Yi* almost at the same time. However, doing like this also has limitation because the company cannot ensure whether the drama is popular enough for selling TV drama product line.

4) Full of creative resources

Although Olive Nine uses two human resources strategy, permanent staffs and freelances, it has enough pool resources of drama creators. Some part of Olive Nine writers and producers name list

are Kim, Eun Sook (Writer of *Lovers in Paris and Lovers in Prague*), Jung, Hyung Soo (Writer of *Damo, Jumong*) and Kim Cheol Kyu (Producer of *Summer Scent*)

5) Synergy between telecommunication channel and media content

Recently, there is a changing point for Olive Nine after merging with KT Company, one of the biggest telecommunication companies in Korea. Before Korea Telecom Co.,Ltd. (KT company) decides the large scale investment in Olive Nine on October 2006, it also acquired Sidus FNH's movie branch last year. Therefore, this acquisition creates a big synergy among telecommunication, movie and TV drama business. The acquisition of Olive Nine will increase the competitiveness of KT Company in content business and strengthen KT relationship with broadcasting system, thus maximizing KT capabilities and negotiation power, as well as content abilities.

6) High budget

Because of merger between content providers and telecommunication companies, it increases potential of

production companies to get a high production budget. Moreover, nowadays, Korean TV dramas can be sold not only in local but also international market. There are increasing investors who are interested in TV business.

The high budget may be not an only one factor that can guarantee the success of TV drama. But, the high budget also indicates that Production Company will be able to extend a production scale, hire talent production crew and TV stars like *Jumong* and *Hwang-Jin-Yi*.

8.4 Key success factors of TV drama creators

1) The industry attracts talented people

Because Korean TV industry is a high return business, many more talented people are attracted to be part of the business. Even Ms. Kim Do-woo, a scriptwriter of “My lovely Kim Sam-soon”, said that she became an “idol” for the young ladies who want to be a scriptwriter. Unlike the past, the careers in entertainment business become the fascinating careers especially for teenagers and young generations. This can ensure

that Korean TV industry will be more competitive in the future.

2) The freedom of drama creators

According to Prof. Kim Yun chul Korean directors and producers quite have a freedom in creating their own dramas without intervention from TV stations. He can comment a script from scriptwriter without TV station management approve. Moreover, marketing is not first important factor for Korean producers and directors.

“I’m a director. I just do my job. I don’t think I have to worry about arketing. That kind of business should belong to business unit of TV stations”²⁴

This statement is quite relevant with interview from TV station marketing officer as following.

“We (marketing department) can give an advice to a production team. But, a final decision depends on a production team because production team has to

²⁴ Interview with Kim Yun Chul, Director and producer of “My lovely Kim Sam-soon”, 23rd October 2006

consider about production budget as well."²⁵

Therefore, creators in Korean TV business have a freedom to create their own work. Marketing officers and TV station managements do not intervene during the production process. It does not mean that Korean TV stations do not care about marketing. However, Korean TV dramas use contents lead marketing; marketing does not lead the contents. They quite believe that good products and good stories, not a marketing force, are the beginning of success.

3) Teamwork

Scriptwriter and director work

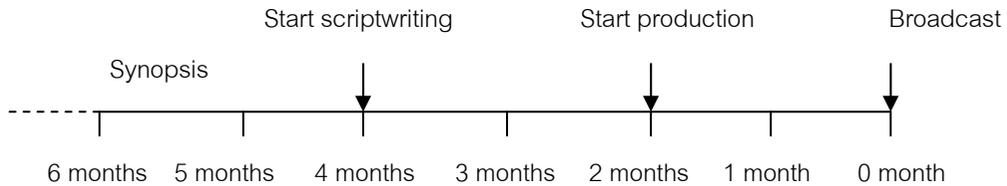
together as a team. Ms. Kim Do-woo thinks she gets a respect from co-workers as much as she respects others. She does not involve with other process such as casting or costume because they are not her specialists. As a result, the researcher conclude that one of key success factors for Korean TV dramas is the fact that Korean dramas creators can work as a team with a respect on each other works and opinions.

4) Enough working time and return

From an interview, Ms. Kim Doo-woo said that she wrote one TV drama per one year.

²⁵ Interview with Haewon Chin, Senior marketing officer, MBC, 1st November 2006.

Picture 5 Duration of scriptwriting process



As a result, she has enough time to think thoroughly about the synopsis, create the characters and discuss with the director. However, this also means that the return of writing script for one TV drama is enough for one scriptwriter to survive in one year as well. Otherwise, there will be a pressure for scriptwriter to keep working in the industry.

5) Opportunities for new raising stars

There are opportunities for gifted people who are interested in entertainment business in Korea. For example, there are competitions for scriptwriters every year. Although talented persons do not have connection and do not know anyone in industry, they can turn to be professional scriptwriter if they have competencies.

6) Professional institute for creative workers

In Korea, there is an institute called "KTRWA" (Korean TV & Radio Writer Association) which is private organization established by one Korean scriptwriter. 80% of Korean scriptwriters graduated from this institute. Ms. Kim Do-woo, a scriptwriter of "Snow man", "My lovely Kim Sam-soon" and "Foxy lady" also got a certificate from this institute. The establishment of professional institute such as KTRWA is another key success factor for Korean TV industry. With professional experience, KTRWA can provide qualified graduates who will become a next generation of Korean scriptwriters.

8.5 Threats of Korean TV industry

Although several Asian countries supported Korean wave in order to balance with Japanese popular culture, their national television programs are overwhelmed by Korean TV dramas, which make people realize that Korean TV drama is not just an entertainment. Zhang Guolin, a Chinese actor, has said China is becoming "a giant in importing foreign culture" and watching Korean TV dramas was tantamount to selling out the nation".²⁶ "Cultural imperialism" becomes a controversial accusation for Korean TV dramas. And, a signs of backlash against the Korean wave has begun in 2005.

Though their tremendous success, the long-term future of Korean TV drama popularity is still in question. There is a warning sign that, in next two or three years, exporting Korean TV dramas to other Asian countries will face an obstacle. For example, in Japan, starting from 2005, a Manga (Japanese comic) with a title usually translated as "Hating Korean wave" or

"Manga Kenkanryu" has published in Japan.

China's State Administration for Radio Film and Television (SARFT) also said last December that China had been too generous with the import of Korean TV dramas and called a stricter screening process. It said China could limit airtime for Korean dramas to 50 percent.

Soon after, China Central Television (CCTV) said it would gradually reduce the amount of time allotted to soap operas from Korea, and Beijing TV is pondering a similar move and says it will start showing more Hong Kong and Taiwan-made soap operas.²⁷

Meanwhile, Hong Kong's Wenweipo newspaper also reported sign that Taiwan is following Mainland China's lead in a drive to limit airtime for Korean drama as well. The daily quoted Taipei's Government Information Office (GIO) Chief Pasuya Yao as telling the island's parliament Tuesday that the GIO was assessing a proposal to ban or limit foreign

²⁶ The Chosun Ilbo, "Taiwan, China united in Backlash against Korean wave," <<http://english.chosun.com/w21data/html/news/200601/200601110009.html>>, January 2006.

²⁷ *Ibid.*

TV drama in the prime time slot from 8.00 p.m. to 10.00 p.m.²⁸

For Taiwan, the main reason for limit Korean TV dramas' airtime may be not nationalism or cultural conservation. Korean officers thought this action came from the fact that Taiwan has to protect their own dramas and support their own movie and television industries.

In Southeast Asia, the cultural confrontation is less than East Asia. Unfortunately, there is a sign of Anti-Korean wave as well. A high-level Vietnamese government official recently threatened to stop broadcasting South Korean television dramas unless the South Korea's TV networks introduce Vietnamese shows on a more equal basis.²⁹ All of these warning signs are the issue that Korean government and Korean TV industry have to concern. Otherwise, Korean wave will be like a firework, sparkling and disappearing only for a few minutes.

8.6 Opportunities of Korean TV industry

The Changes of Media Technology:

IPTV (Internet Protocol Television) describes a system where a digital television service is delivered using the Internet Protocol over a network infrastructure, which may include delivery by a broadband connection. IPTV is an interactive media which audiences can select TV program by themselves.

Audiences can watch IP TV with TV set or mobile phone if there is an Internet access. Now, 80 % of Korean household has Internet access. Therefore, within three years, IP TV will become media for a future. This statement is relevant with the research "challenge on IP TV". According to this research, supposed that IPTV commercial launch begins in 2006 in Korea, it is projected that the number of subscribers would reach 570,000 in 2006 and increase up to about 3 million by 2012. In addition, sales would record 160 billion

²⁸ *Ibid.*

²⁹ Asain Times online, "South Korea in trade flap with neighbors," <<http://atimes.com/atimes/Korea/GK12Dg02.html>>, 12th November 2005.

KRW in 2006 and increase to 770 billion KRW by 2012.³⁰

The Changes of TV advertisement format:

Because of media technology change, TV advertisement format in the future will be very different from the present. There will be no real TV advertisement because audiences can program their own TV. They will not choose to see any TV commercials. However, Korean broadcasters predict that home shopping channel will replace commercial. Audiences can watch drama and buy products that actors or actresses use for play in drama. Otherwise, we can say that a content and commercial in TV industry will be merged together. There is no line to separate between content and commercial anymore. And the content business will be very influent in the future.³¹

The integration between telecommunication and content providers:

As above statement, media content will be very influent in the future. That is why, recently, the big Korean telecommunication company like KT Company decided to merge with production house Olive Nine.

KT announced it would invest in production house Olive Nine to the tune of 20.4 billion won. With such a hefty sum, KT will acquire 8.5 million Olive Nine shares, becoming largest shareholders with a 19.12% share. CEO Go Dae-Hwa, formerly the largest shareholder, will leave with 4.3 million shares (9.66 %). KT announced that in addition to an enthusiastic investment in BCN (Broadband Convergence Network), they would invest in the contents field, creating a blue ocean of communications infrastructure and media contents. With their convergence model of communication and contents, they now have a better chance of entering the global market.

In addition to Olive Nine's drama, entertainment program, music and celebrity management sectors, KT acquired Sidus FNH's movie branch last year. With investment from KT, Olive Nine now has the

³⁰ Interview with Boo-Sung, Choung, General Manager of Marketing Department, Olivenine Co., Ltd, 29th November 2006.

³¹ Interview with Boo-Sung, Choung, General Manager of Marketing Department, Olivenine Co., Ltd, 29th November 2006.

financial ability to sign key actors and produce more than ten dramas and entertainment programs a year. Olive Nine and KT will develop a new business model for the digital media environment that will maximize profit and take advantage of the Korean Wave market.³²

The co-production programs:

In order to resolve anti-Korean wave problem, Korean government try to initiate more program of cultural exchange among Asian countries. Moreover, Korean Broadcasting Institute (KBI) also encourages **Co-production** between Korean TV companies and other countries. Co-production means using Korean production facilities with other countries content. For example, in Thailand, Korean production crews work with Thai production crews to make Thai content. Korean government hopes that the localized process will reduce the cultural conflict between two countries. Korean government tries to change Korean wave from one-way cultural export to two-way cultural exchange.

Therefore, people in other countries will realize Korean wave as a cultural embracement, not a cultural invasion.³³

The corporation among the organizations in TV industry

Recently, there is a new association called CODA (Corea Drama Association). Kim Jong-Hak Production, Group 8, Olive Nine, Yoon's color, DSP ent., Logos film, Appletree Pictures, iHQ, JS Pictures, Chorokbaem Media, Pan ent., and many other production houses have already enrolled as member of the association. According to official CODA establishment announcement, the main reason for CODA establishment is to reach consensus through cooperation and development of Korean TV drama companies. In order to continue the Korean Wave, Korean TV industry needs a medium to help acquire the appropriate information and feedback. As a result, they have created the Corea Drama Association to

³² "KT and Olive 9 join hands: Fusion of telecommunication and media contents," ASTA TV, (November 2006): p. 82.

³³ Interview with Harrison Yu, General manager of Korean Broadcasting Institute, 6th December 2006.

play the role of the medium and strive for a better broadcasting culture together.³⁴

9. Conclusions and Suggestions for Thai TV industry

From overall research information, the researcher concludes the following issues, which can be a benchmark for Thai television industry. :

1. The government organizations related with TV industry should be flexible and adapted with the changing environment. ;
2. An organization, which has mission to conduct and develop researches of current trends in broadcasting industry, should be established. Moreover, there should be a channel to disseminate valuable information to the broadcasters in the real business sectors. ;
3. Higher budget should be provided on human resource development in broadcasting industry. Moreover, there should be a linkage between education sector and business sector

in order to produce the graduates who can work effectively in a real business sector. ;

4. There should be an effort to create a synergy between content providers and telecommunication business. ;
5. The rating evaluate system should be reliable and reflect the real audience behaviors. ;
6. There should be an incentive for the people who work in the entertainment industry, both in form of return and reputation. ;
7. There should be a norm, which encourages teamwork among people working in the TV industry. An effective communication should be created with a respect for each other expertises and opinions. ;
8. There should be an opportunity for new raising stars that want to enter in an entertainment business. The new raising stars are not included only actors or actresses but also creative workers such as scriptwriters, directors and producers. ;
9. There should be an establishment of professional association that has a role to create interactive community.

³⁴ "Corea Drama Association (CODA) What will they do?," *ASTA TV*, (November 2006): p. 66-67

This community should encourage people in the industry to share their professional experience. In addition, the association should be an academic institute, which produces the talented young professionals for the industry as well. ;

10. There should be a “freedom space” for people working in television business, especially creative workers such as directors and scriptwriters. They should have a chance to focus on their own work without pressure from management decision. ;
11. The “content” of should lead the “marketing” of TV dramas. People in TV business should believe that the secret of success is nothing more than the fact that they can make the audiences like their dramas. ;
12. The government should encourage the corporation between Thai broadcasting industry and other countries in order to make Thai broadcasters have an international working experience and prevent a cultural conflict as well. ;

10. Recommendations for the future studies

In order to use the Korean television industry as the benchmark for Thai television industry, the comparative studies between two industries should be conducted. The comparative framework can range from the industry structure, the media policy law & regulation, the viewer behavior, the rating system to the marketing practice. Also, it is interesting to compare between Thai television dramas which are popular in neighboring countries and Korean television dramas which are exported in a global market. The question which is still not answered is whether Asian dramas, including Chinese, Japanese, Korean and Thai, have common factors that make them be able to overcome the cultural barriers and be popular among the audiences in foreign countries. This would help extend our knowledge of transnational media consumption in a globalization era.

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