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THE IMPACT OF CULTURAL INDUSTRIES ON NATIONAL ECONOMY

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ABSTRACT

The main objective of this paper is to examine the impact of cultural industries in general and film industry in particular on national economy. Globally, cultural industries have contributed to economic development of many developed and developing countries. For example, in the United States, film industry (which fall under the category of cultural industries) contribution is greater than its aerospace industry. In the case of third world countries, film industry has been neglected in the academic literature despite its huge potential contribution to the economy. Based on the reviews of earlier studies, it was found that little attention has been given by scholars to study the impact of cultural industries and national economic development. Most studies on economic development focused on other industries deemed significant, especially manufacturing industry. Hence, this paper highlights the importance of cultural industries and its potential contribution to national economy. It also highlights some important points that need to be considered by national government in their effort to benefit from the development of their national film industry.

Keyword: cultural industries, film, national economy, economic development.

INTRODUCTION

UNESCO (2005) defined cultural industries as those industries that “combine the creation, production and commercialisation of contents which are intangible and cultural in nature. These contents are typically protected by copyright and they can take the form of goods or services”. One important aspect of cultural industries is that they are “central in promoting and maintaining cultural diversity and in ensuring democratic access to culture”. Major cultural industries include architecture; advertising; art; broadcasting; consumer electronics, craft, fashion, festivals and cultural events; film industry; Internet industry; mass media; music industry; performing arts; print and electronic publishing; sports; software; toys and games and video games. This definition serves as a basic guide, as the rapid emergence of new technologies makes it difficult to maintain set distinctions between cultural goods and services.

The development of global cultural industries is significant and has shaped the economy of many countries and continues to affect global industry. The industry has become international in its functioning and global in its marketing. It is one of the fastest growing sectors in the world economy and is contributing significantly to economic growth worldwide (Scott, 2004). Hesmondhalgh (2002) found that global cultural industries have become a major catalyst of growth in the world economy. According to Hesmondhalgh (2002) they have moved closer to the centre of economic action across the world and, thus, can no longer be deemed secondary to the real economy. It was estimated that cultural industries account for more than 7 percent of the world’s Gross Domestic Product (World Bank, 2003 cited in UNESCO, 2005) and it was forecasted to grow at a rate of 10 percent annually. For example, cultural industries in the United Kingdom employ over 1.3 million people and already generate revenue of over 110 billion pounds. There was an unprecedented increase in the trade of cultural goods and services, averaging 8.7 percent per annum for the period 2000-

2005. Specifically, the export growth for cultural services was estimated at 8.8 percent annually between 1996 and 2005. In 1996 the overall global exports of cultural products were valued at \$227.5 billion and the value increased to \$424.4 billion in 2005 (UNCTAD, 2008). However, there is an imbalance in the flow and exchange of cultural products at the global level.

The importance of cultural industries, as expressed by UNCTAD (2008), provides opportunities for income generation, employment and export earnings while at the same time promoting cultural diversity and human development. Although the current global markets of cultural products are still dominated by developed countries it is also a feasible option for developing countries to foster the development of their cultural industries for economic growth as well as a means of cultural preservation.

Recent evidence shows that many developing countries have benefited from their cultural industries. For example, large developing countries like India, Mexico and Brazil have strong capabilities in the development of their audiovisual sector that has contributed to their respective economic growth. Even in many Latin American countries, cultural industries contributed to the GDP and employment as shown in the table below:

Table 1
Cultural Industries Contribution to Selected Latin American Countries

Country	Base Year	Cultural Industries Impact	
		GDP	Employment
Argentina	1993	4.1%	-
	1994	-	3.5%
Brazil	1998	6.7%	5.0%
Columbia	2001	2.01%	-
	1999-2002	-	27,724*
Chile	1990-1998	2.0%	2.7%
Uruguay	1997	6.0%	4.9%
Venezuela	1997-2000	3.0%	35,329**
	2001	2.3%	

Source: OAS (2004) "Culture as an Engine for Economic Growth, Employment and Development".

*Jobs in three sectors: publishing, phonography and filmmaking.

**Jobs in four sectors: graphic arts, radio, advertising and filmmaking.

The two major drivers for the growth and development of cultural industries (UNCTAD, 2008: 22) include technological advancement and increased demand for cultural products. The advancement and convergence of multimedia and telecommunication technologies has led to the integration of the means by which creative content is produced, distributed and consumed. Digital technology has brought about enormous growth in the range of media such as increased television services through cable, satellite and the Internet, which further increases the demand for media content. In addition, globalisation witnessed the deregulation and privatisation of media and telecommunication industries. These developments have provided countries with opportunities to successfully develop their cultural industries and benefit from the growth of the sector. The Republic of Korea, for example, has harnessed the potential of developing creative content with new technologies in video games, animation and other audiovisual services. As a result, its television programming exports have increased in value from \$12.7 million to \$37.5 million over the period 1999 to 2003 (Shim, 2006).

One of the driving factors for increased demand is the rise in real income in industrialised countries that tends to increase the demand for income-elastic products, which include cultural goods and services. The increased demand in cultural products can be associated with the technological advancement factor, where the real prices of some cultural products have fallen as technology advances leading to increased demand for consumption. In addition, the changing pattern of cultural consumption continues to drive the growth of cultural industries. The new generations of consumers are using the Internet, mobile

telephony, digital media, etc. which expands their range of cultural experiences and transforms them from passive recipients to active co-creators of cultural content.

AUDIOVISUAL SECTOR

There is no clear definition of what constitutes audiovisuals but UNCTAD (2008, p. 124) categorised audiovisuals as including motion pictures, television, radio and other forms of broadcasting. Within cultural industries, the audio-visual sector is one of the fastest growing services sectors in the world and has emerged as one of the dynamic service sectors in world trade (UNCTAD, 2008; UNESCO, 2005; Mukharjee, 2002). For example, UNDP (2004) reported that the global market for film is estimated to be worth \$60 billion dollars annually. The market for films continues to be dominated by American films. Hollywood productions have been dominating the films shown throughout the world. India has become the largest film producer but in terms of market reach and value, Hollywood is still the leading player.

The value of the global audiovisual sector is derived from the revenue of box-office sales, music rights, television and satellite rights, video and Internet rights, merchandising, CD and DVD rentals plus copyrights for reproduction. This indicates that the earnings of the audiovisual sector is critical to the protection of Intellectual Property Rights (IPR). Concerning the film industry, UNESCO (2005) made an estimation of the global value of the film industry, which was around \$75 billion in 2005. Of this, \$55 billion was for the production and sales of DVDs. The global film industry continues to be dominated by a small number of big, vertically integrated groups, inhibiting the expansion of the film industry in the developing countries and their presence in the global market. It was estimated that 85 percent of films shown throughout the world are Hollywood productions. Developing countries are left as the main importer of the advanced countries' products. Studies have termed this phenomenon as 'cultural dependency' or 'cultural imperialism' (Schiller, 1971 cited in White, 2001). This phenomenon of dependency relationships, i.e. developing countries dependence on programme imports from Western industrialised countries, became more profound from the study of the flow of global television programme. The early patterns of media technology and television programme flows to developing countries shows that the television programme market was dominated by Western industrialised countries, particularly the United States.

Pioneering studies include one carried out in the early 1970s under the auspices of UNESCO. This study was conducted by Nordenstreng and Varis (1974) to document the international flow of television programme materials. As reported, television programme flows was previously a "one-way street" with developed countries, particularly the US dominating the exportation of television programmes (UNESCO, 1974). Later, Varis (1985) in a similar attempt reported that US dominance is pervasive and concluded that "...no major changes have taken place since 1973" (p. 83). The latest report by UNCTAD (2008) also shows that developed countries are still dominating the global market for audiovisual products.

The consequences of the findings from the study of global programme flows and the cultural imperialism theory has raised the issue of the impact of imported programmes on local audiences. In the early arguments, discussion on cultural impact was predominantly the concern of the potential harmful effects of imported programmes on undermining local cultural values in developing countries (Hoskins and Mirus, 1988; Pool, 1977). The concern over the negative socio-cultural influence of imported programmes might be one of the reasons for the increase in locally produced programmes in developing countries.

However, despite the current circumstances, many developing countries have emerged as significant players in global audiovisual markets. As a result, authors refuted the claim over the cultural imperialism theory (Chadha and Kavoori, 2000). Based on empirical findings on cultural flows in Asia, Chadha and Kavoori (2000) found that there are increasing intra-regional flows of Asian programming and exchanges of expertise and resources within the region which began in the 1990s. It was argued that with the launch of Star TV channel in 1991, which catered for Asian audiences, programming was being tailored to suit local tastes. Other satellite television channels have followed suit by featuring regionally produced and

regionally oriented programmes like CNN, MTV, BBC and Disney channels. One observed implication has been the increasing number of regionally produced programmes aired by satellite channels, leading to an increase in demand for regional television contents. What is absent in the cultural imperialism' argument is the role of the audience. The argument of the opponents of the 'cultural imperialism' theory, is that it ignores audiences as an active force of resistance to foreign programming and considers them as merely passive (Chadha and Kavoori, 2000; Herman and McChesney, 1997 in Doobo, 2005; Sinclair, Jaacka and Cunningham, 1996). While studies by Straubhaar (1991) and others found that audiences are not passive when it comes to programme preference, with evidence indicating that audiences prefer locally produced programmes or those that feature a similar culture. What follows in the discussion is a review of the current trends of audiovisual services in Asian and other developing countries.

THE CHANGING PATTERN AND TREND IN CULTURAL INDUSTRIES

Globalisation has significantly altered the pattern and trend in the global audiovisual industry. Developed countries have recognised the importance of the global market and global production location. The increasing trend is happening, especially in the film production sector to capitalise on foreign production locations. Producers are motivated to shoot their films in foreign locations as they are attracted by among other factors, cheaper production costs. With the emergence of the New International Division of Cultural Labour (NIDCL), (Miller, 2003) similar to that of the trend in the global manufacturing industry, cultural production has also fled from industrialised countries to relocate to cheaper production locations. Globalisation allows multinationals to reduce labour costs and take advantage of tax incentives, exchange rates and more favourable terms offered by global locations for cultural production. Even the United States producers have increasingly been shooting in countries like Canada and Mexico (Hoskins and McFadyen, 1991). Hence, many countries have responded to this global trend by positioning their countries as an attractive location for shooting films. The desire to attract global producers to shoot films is to capture economic benefits and other spillover effects, which include employment, income, and the transfer of expertise.

Among the important trends that have increased are "coproduction" arrangements. A coproduction is collaboration between two or more producers from different countries for the creation of film and television programmes and has been increasing since the 1990s (Baltruschat, 2002). It is also used as a means to capture foreign audiences. The rationale behind engaging in coproduction arrangements is to pool financial, creative and technical resources from participating countries for the production of films and television programmes. According to Taylor (1995, p. 414) initially, co-productions were perceived to enhance collaboration between countries with small production industries to pool resources and compete in an international market. However, coproduction is also used to create culturally specific materials for local markets and prevent the increase of the foreign market. In current development, coproduction is used less in producing culturally relevant materials but more for adopting popular genres, often simulating Hollywood productions, such as adventure series, science-fiction programmes and shows that contain hybrid elements drawn from a variety of genres that would make it acceptable and successful for global audiences (Baltruschat, 2002).

Thus, the current trend in film and television programme production has been directed at the hybridisation of cultures to meet its commercial focus of targeting international audiences (Lai, 2006). For less developed countries to facilitate the development of their film and television programmes, they need to have access to this mode of production (Baltruschat, 2002). Looking in a positive way at this kind of mode of production, the collaboration between producers from different countries can be used to raise important global issues such as the environment, economic reforms, the WTO and minority rights issues, and different producers can highlight different perspectives and encourage debate on a global scale. Thus, it is the ability of developing countries to seize the opportunities brought about by the process of globalisation that differentiates between winners and losers in the process of globalisation. It can be concluded that globalisation has changed the way of doing business and that this

development provides opportunities for developing countries to benefit from new trends in audiovisual industries (UNCTAD, 2008; Baltruschat, 2002).

THE CHANGING TRENDS IN GLOBAL AUDIOVISUAL SERVICES

The audiovisual service sector includes the production and distribution of audiovisual contents such as motion pictures, television programmes, radio and sound recording. The increased global demand for films and television programmes has been associated with technological developments. As discussed earlier, the advancement in the television industry, with the growth of cable and satellite transmission capability and the expansion of channel capacity has vastly influenced the increased demand for television programming.

Despite the current imbalance in flows and exchange of cultural products at the global level, Asian and other developing countries have been an important player in the development of the audiovisual sector. As a result of technological development and open market, many developing and Asian countries like China and India are emerging global players in the audiovisual sector. As mentioned earlier studies by Nordenstreng and Varis (1974) and Varis (1984), the global flows of television programmes shows “one-way” flows of television programmes from developed to less developed countries. Later, studies on the global flows of television programmes found that there were changes in the nature of global television flows (Rogers and Antola, 1985; Oliviera, 1986). The study by Rogers and Antola (1985), who studied the flows of television programmes between the United States and Latin American countries, found that locally produced Brazilian, Mexican and Venezuelan programmes successfully competed against the US television programming imports. For example, compared to the 1960s, Brazilian TV networks now broadcast almost 80 percent indigenous programmes, an increase of 40 percent (Olieveira, 1990; Straubhaar, 1984). In addition, the television programmes produced are able to displace US imports programmes in neighbouring countries (Rogers and Antola, 1985; Oliveira, 1990; Straubhaar, 1991). Accordingly, the study by Varis (1984) on television programmes exchange shows that there is a trend in the regional exchange of television programmes. He found that in Western and Eastern European countries, more than 40 percent of the imported television programmes originate in other countries of the region. The same scenario is evidenced where regional programme exchanges can be traced among Arab countries with approximately one-third of the imported programmes coming from the countries within the region such as Egypt. In these instances, cultural proximity plays an important role in the spread of television programmes in the region. The study by Straubhaar (1991) in the Dominican Republic found that audiences prefer more culturally proximate television programmes. This is because audiences can relate easily to the common styles, values, beliefs, institutions and behavioural patterns that are depicted in local or regional programmes compared to imported United States television programmes. The study further revealed that locally produced programmes became the first preference followed by programmes from regional countries of Latin America, Asia, or Africa, which shows that programmes are more culturally proximate, compared to programmes imported from the United States. The following are further discussions on countries that have successfully participated in the global audiovisual market.

In Latin America, the regional integration through MERCOSUR has facilitated the development of cultural industry in the region, particularly the television production industry as discussed earlier. Argentina, Brazil and Colombia have emerged as important players in the global television industry. Indeed, the penetration of television broadcasting into the production sector has benefited the industry tremendously in terms of programme exports. Brazil's TV Globo and Mexico's Televisa are the main exporters of television programmes, especially in the form of popular “telenovela” or soap opera.

India has emerged as the world's largest film producer, producing about 1,000 commercial films annually, more than Hollywood, which produces around 800 commercial films annually. However, in terms of world market share Hollywood still dominates as India's Bollywood products are mostly for domestic consumption only. The exportation of India's films predominantly focus on the Indian diaspora market (e.g. Mauritius, Sri Lanka, Qatar, Oman, Fiji, Bahrain, Kuwait).

In Asia, China has emerged as one of the largest film producers. The development of the Chinese film industry is impressive, especially in its attempts to penetrate the Hollywood market. For example, the Chinese film “Crouching Tiger Hidden Dragon” has grossed more than US\$100 million in the United States market alone and it was the first foreign-language film to take in that amount of cash (Plate, 2002). As with South Korea, which has emerged as one of most successful film producers, and its film industry has turned into an export-industry. The development of the Korean film industry can be traced back to 1996 when the government provided strong support for the industry to become one of its engines for economic growth (Jin, 2006). The success of Asian countries cinematic output and creativity has captured the interest of Hollywood. For example, Japanese horror movies are successfully capturing not only Asian audiences but also North American. The American horror movie “the Ring” was a Japanese re-make employing American actors and the shooting was done in American cities. The evidence indicates that Asian countries have been able to benefit and advance their capabilities in film production.

In response to the demand for cultural products by modern African countries, the Nigerian so-called “Nollywood” has become successful in the video-based film industry. It claimed to be the world’s third largest producer of feature films in terms of the number of films produced annually. The US\$250 million a year industry is claimed to have generated thousands of jobs within a short time span of 13 years. Producing mostly low-budget films between 500 to 1,000 movies a year, the development of Nollywood film industry is made possible by the availability of digital technology and Nigerian entrepreneurship. The huge African market provides the demand for Nollywood cultural products (<http://www.thisisnollywood.com/>).

The changing trend of global flows of film and television programmes has challenged the traditional debate of cultural imperialism and the North-South flows of cultural and media products (Sinclair, Jacka and Cunningham, 1996). Nonetheless, the US is still widely recognised as the largest producer and exporter of audiovisual services. Mukharjee (2002) reported that, in 1998, the US film, television and home video industries earned over US\$12 billion through exports to 105 countries.

Generally, developing countries are the net importers of global television programmes or content. Uneven development can be characterised as to the development of the production industry in developing countries. From the above evidence, although some have been successful in benefiting from its cultural industries, others lack the capacity to develop a sizable indigenous production industry. In light of the above, it can be summed up that one interesting development identified has been the rise of regional programmes suppliers. As reported by Wideman and Siwek, (1988), in Bicket (2003), Brazil and Mexico have been an important exporter of programmes for the Latin American market while Egypt has been an important supplier to the Arab World. By the same token, Hong Kong supplies much of the programmes to the Southeast Asian market. Although quantitative evidence shows that the US exports to all these regions remains very important, regional producers have begun to offset the absolute impact of the US global and regional supply of programmes.

GLOBAL TREND IN CULTURAL INDUSTRIES AND ITS IMPACT ON NON-WESTERN AND DEVELOPING COUNTRIES

In the wake of current trend of global cultural industries, there are opportunities as well as challenges facing developing countries. Further is the discussion on how the trend in cultural industries, particularly the film and television content, affects developing countries in terms of opportunities and challenges.

Opportunities

As noted by UNCTAD (2008) and UNESCO (2002), the development and trend in global audiovisual services provides opportunities for developing countries. Accordingly, countries can develop their potential and benefit from it. Globalisation has resulted in many developing countries becoming a significant player in the international market although the ‘cultural

imperialism' theory has attributed the effects as merely a 'cultural imposition', which signifies the inevitable influence of a foreign presence. The development of media industries in East Asian countries, for example, has lessened the concern over the importation of Western programmes. The establishment of media industries increased the opportunities for local producers to produce local programmes to fulfil the demand for media content. Since the local palate for film and television programmes was much influenced by Western popular culture, producers in developing countries have moved towards the format adaptation of foreign programmes in many genres, including television drama, game shows. In order to attract local audiences, the localisation of foreign programmes is prevalent. It seems that this formula is more useful for the domestic industry compared to the direct importation of foreign programmes. This kind of programme is termed 'cultural hybridisation', which can reach a wider audience encompassing regional audiences (Lai, 2006; Shim, 2006).

In contrast, many producers from developed countries are motivated towards reaching a global audience. Hence, the incorporation of global values in one's film has become a strategy to attract a global audience. Further, US producers have shown interest in the creativity of non-Western producers. This is evidenced through the adaptation or remakes of non-Western movies. For instance, 'The Departed' directed by Martin Scorsese was a remake of Hong Kong's 2002 'Internal Affairs' directed by Andrew Lau and Andy Mak¹.

Many developing and non-Western countries have been able to develop their domestic film and television production industry not only in serving domestic markets but in achieving export potential. For others, that do not have a comparative advantage in achieving export potential, globalisation provides niche areas that can be seized by developing countries. How to develop the industry in a way that is beneficial to the growth of the economy is by concentrating on areas where countries have or can develop niche areas in the industry segment. As discussed earlier, developing countries can benefit through the increasing trend in film and television programmes for out-sourcing, 'production location' and coproduction arrangements.

One of the potential areas that merit attention is the animation industry. It was estimated that the global computer animation industry is growing at the rate of 20 percent per annum and the industry is currently pegged at US\$25 billion (Mukharjee, 2003). The animation industry is a labour-intensive industry. Due to factors like lower cost, high quality or even lack of talent, many American animations are outsourced to other countries like South Korea, India and Japan. Hence, a developing country can position itself within the global division of labour to take advantage of the current trend in animation production industry, which is very beneficial in creating employment opportunities.

Challenges

Many have found it difficult to develop domestic industry given the stiff competition from foreign programmes. Although aggregated data on the film and television production industry is scarce, the available data shows that developing countries still account for a small share of audiovisual services exports. However, the trend is encouraging, moving towards a growing global market share of exports in audiovisuals by developing countries. Saúve (2006) found that the challenges faced by developing countries in the development of its audiovisual industry include the production and distribution of indigenous film and television programmes.

- Production – In the area of audiovisual, particularly motion pictures, high capital cost and technical sophistication are needed to produce films that can satisfy the mass market. Although there are exceptions (Hong Kong movie industry is well accepted in the international market and India produces more films than any other country) many countries are facing difficulties in terms of their financial and human capital to develop their industry.
- Distribution – film distribution in developing countries is usually dominated and run by big, international Western distributors. Studies by Barlett (2006) on selected African

¹ *Utusan Online*, 28 October, 2008, 'Naskhah Tomyam Hollywood'

countries found that they face real challenges from these giant players in the distribution channel.

As reported by Mashayekhi (2002), the development of the audio-visual sector in most developing countries is hindered by the lack of development of cultural products, investment, incentives for creators, professional training, and promotion mechanisms and appropriate distribution networks. Moreover, the small size of firms, high cost of equipment and services related to production and distribution, lack of access to financing, limitation in know-how and access to technology and quality control, lack of appropriate legal and fiscal frameworks are important barriers to the development of cultural industries in developing countries.

In the production of television programmes, normally the capital requirements are much smaller, which tends to make the cost of production lower? Many developing countries have successfully developed their domestic production capacity so that it is not only sufficient to supply the domestic market but also export markets like Brazil, South Korea, Mexico and Thailand. Brazil and Mexico are among the major exporters of television programmes. To become exporters of audiovisual products, developing countries still need the necessary support at the national and international level to develop this industry. There are strategic initiatives by many developing countries that include government intervention and support in terms of policy formulation in accordance with promoting the development of the domestic audiovisual industry (such as the 2006 report for Caribbean countries and 2005 report for Trinidad and Tobago).

Due to the advancement in information and communication technologies, companies are more creative in their distribution strategy. The produced films and other programmes are beginning to be marketed through other means of new media like the Internet. Unlike traditional broadcasting the government can intervene by regulating, such as the imposition of quotas but for the new media like the Internet, it is difficult to regulate and control. Piracy is a global problem for media content. For developing countries this is an enormous challenge to its domestic industry. Research by IIPA (2008, 2006) reported that many developing countries are sources of pirated products. One of the competitive advantages of the film industry is a sizeable domestic market that can sustain the cost of production. If the domestic market is affected by pirated products, it is difficult for the industry to move on to the international market. On the other hand, many others are unable to seize the opportunities brought about by this current trend. That is why there are many concerns raised regarding the impact of the globalisation of audiovisual products on local culture. Studies found that it is not easy to provide the balance between the economic and cultural significance of cultural industries. Careful consideration needs to be given to ensure that achieving economic benefit is not at the expense of the country's own culture.

SUMMARY AND CONCLUSION

This paper illustrates the evidence of how the new trends in global cultural industries are having a profound impact on national economies, particularly of non-western and developing countries. With the emergence of the New International Division of Cultural Labour (NICL), many Third World Countries have risen above being a mere source of cheap labour and market for developed countries film materials (Miller, 2003).

The literature further reveals the importance and the potential contributions made by cultural industries in general to the development of the economies of many countries. As a matter of fact, cultural industries have become one of the most dynamic emerging sectors in global world trade (UNCTAD, 2008; UNESCO, 2002). Hence, it is important to carry out the study focusing on how increased globalisation is affecting the national economy and industry (Lorenzen, 2008, 2007; Saúve, 2006; Quarles, 2006). It should be noted that although many third world countries have become global players in the film industry, the presence of Western countries are still dominant. Although the studies on cultural industries have received increasing attention by scholars there are still insufficient studies on its effect on the indigenous film industry, particularly in developing countries. Most studies on cultural industries concern primarily on cultural impact such as the impact of foreign films on local

audience. Indeed, in the Malaysian context, as far as the researcher is concerned, no study has been carried out to examine the impact and contribution of cultural industries on national economy. Hence, it is important to carry out the study and fill the gaps in understanding the phenomena.

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