INFORMATION TO USERS

This manuscript has been reproduced from the microfilm master. UMI films the text directly from the original or copy submitted. Thus, some thesis and dissertation copies are in typewriter face, while others may be from any type of computer printer.

The quality of this reproduction is dependent upon the quality of the copy submitted. Broken or indistinct print, colored or poor quality illustrations and photographs, print bleedthrough, substandard margins, and improper alignment can adversely affect reproduction.

In the unlikely event that the author did not send UMI a complete manuscript and there are missing pages, these will be noted. Also, if unauthorized copyright material had to be removed, a note will indicate the deletion.

Oversize materials (e.g., maps, drawings, charts) are reproduced by sectioning the original, beginning at the upper left-hand corner and continuing from left to right in equal sections with small overlaps.

Photographs included in the original manuscript have been reproduced xerographically in this copy. Higher quality 6" x 9" black and white photographic prints are available for any photographs or illustrations appearing in this copy for an additional charge. Contact UMI directly to order.

Bell & Howell Information and Learning
300 North Zeeb Road, Ann Arbor, MI 48106-1346 USA

UMI®
800-521-0600

Temple University
Doctoral Dissertation
Submitted to the Graduate Board

Title of Dissertation: (Please type) Development of Korean Animation Industry: Historical, Economic, and Cultural Perspectives

Author: (Please type) Kie-Un Yu

Date of Defense: (Please type) June 28, 1999

Dissertation Examining Committee:(please type) — Read and Approved By: (Signatures)

John A. Lent
Dissertation Advisory Committee Chairperson

David L. Womack

Robert L. Kidder

Thomas F. Gordon

Thomas F. Gordon
Examining Committee Chairperson

If Member of the Dissertation Examining Committee

Date Submitted to Graduate Board: 8-5-99

Accepted by the Graduate Board of Temple University in partial fulfillment of the requirements for the degree of **Doctor of Philosophy**.

Date 9/27/99

(Dean of the Graduate School)

THE DEVELOPMENT OF THE KOREAN ANIMATION INDUSTRY: HISTORICAL, ECONOMIC, AND CULTURAL PERSPECTIVES

A Dissertation

Submitted to

The Temple University Graduate Board

In Partial Fulfillment

Of the Requirements for the Degree

DOCTOR OF PHILOSOPHY

---

by

Kie-Un Yu

August, 1999

Bell & Howell Information and Learning Company
300 North Zeeb Road
P.O. Box 1346
Ann Arbor, MI 48106-1346

ABSTRACT

THE DEVELOPMENT OF THE KOREAN ANIMATION INDUSTRY: HISTORICAL, ECONOMIC, AND CULTURAL PERSPECTIVES

Candidate's Name: Kie-Un Yu

Degree: Doctor of Philosophy

Temple University, 1999

Doctoral Advisory Committee Chair: Dr. John A. Lent

Animation is globally produced by means of an international division of labor. The Korean animation industry has been at the center of the labor division for about forty years by subcontracting overseas animation, which is the backbone of the industry. The industry currently produces thirty percent of world animation.

Animation and comics, once regarded as a social evil in Korea, drew immense interest from the public, from other spin-off industries, and from the Korean government since 1995 when the industry was designated as a "strategic export industry" by the government. Sixteen colleges and universities established departments of animation and of comic arts in just four years. Domestic and international animation festivals and events have exploded. Publications on animation have flooded the market.

The economic basis of the early industry was not strong enough to sustain its own production of animation. Accordingly, the industry subcontracted animation to

countries such as Japan and America that had difficulties in finding cheap, stable, and skillful labor within their own borders. The frail developmental condition of the industry caused the Korean animation market to be heavily dependent upon imported foreign animation, especially Japanese animation.

The long history of subcontracting and the strong dependence upon Japanese animation along with pirated Japanese comic books pushed Korea into international cultural homogenization. The current cartoon-loving generation has been raised in the settings of the cultural homogenization of Korea and other countries, especially Japan. Korean culture became more like Japanese culture than Korean culture originally was.

On the other hand, there is also anti-Japanese sentiment stemming from Korea's experience under Japanese colonization (1910-1945). The domestic animation producers are aware of the sentiment and reflect it in their works. In this historic-cultural context, Korean animation is in a position of cultural "glocalization": globally homogenized but locally resistant culture. This cultural glocalization has driven the industry to invent a new creative form of animation that is neither wholly imitation nor wholly original.

ACKNOWLEDGEMENTS

It is a pleasure and an honor to acknowledge the many wonderful people who have made great contributions to the whole procedure of this dissertation. Without their tremendous support, timely help, and reliable guidance, this dissertation would not have been possible.

First of all, I would like to acknowledge and thank my dissertation advisor Dr. John A. Lent for his teaching, encouragement, patience, and understanding. In his home, in his office, in our trips to conferences and festivals of animation, he became my mentor in this area. I am proud to have been one of his students of comic and animation studies at Temple.

I am also grateful to Dr. Thomas Gordon who as a teacher has been a model that I want to resemble. He was an angel who helped me in a critical moment when I almost gave up and wanted to return to my country. Without his help I could never have become a doctor and would have lived with despair and regret. Dr. Gordon's encouragement and thoughtful guidance were tremendous and indispensable for this research.

I would like to thank Dr. David Womack for his invaluable direction and guidance, without which I might still be wandering in the jungle of the dissertation process.

Dr. Robert Kidder, the former director of the Asian Studies Center at Temple University, is the one who made this dissertation possible in the beginning stages. Without the financial support of the Asian Studies Center, I could not have flown to

Korea and Taiwan to gather materials and information for this dissertation. I am honored by his membership on the dissertation committee.

I have been extremely blessed to have been born to my mother, Oksoo Choi and father, Kisoo Yu, who deserve millions and billions of thanks from the bottom of my heart. "Gam sa ham ni da" (Thank you in Korean). They waited seven years until their second son earned a doctoral degree. Their financial and spiritual support and encouragement go beyond any verbal description. "Thank you, mom." "Thank you, dad." In addition, I wish to thank my brother, and two sisters who provided constant encouragement.

I would like to thank the following people who helped me in this dissertation in many practical ways. They became my discussion partners, interviewees, and information sources. They showed their production studios, and e-mailed and faxed me updated information on the industry. They are Professor Cheong San Lim of Kongju National Junior College, Professor Se Hyung Park of Sejong Universitry, Chang Wan Han of the SICAF 95 Promotion Committee, Jong-Jin Kim of the Korean Cultural Policy Institute, President Wook Jung, You-Il Kang, Sang-Chul Lee, and Nam Ho Kim of Dai Won Animation Co. Ltd., Sang Hong Yi of the Association for Our Cartoon Studies, Shinae Yun of Sunwoo Entertainment, President Hyouk Kim and Kyung Me Jin of Armageddon Co., Ltd, President Chang Rok Jun and Sung Yun Oh of Seoul Movie Co., Ltd, cartoonist Woon Hak Jo, Seung Woo Hong of the independent production group NEMORAMI, President Peter M. Choi of Hahn Shin Corporation, cartoonist Dong-Hun Shin, Doopyo Moon of Toon Town Character

Design, President In Jo of Seoul Kids, Chairman & CEO Nelson Shin and director Dong-Seok Kim of AKOM Production Company, President Young Sup Kwon of The Korean Cartoonists Association, President Seok Gi Kim, Young-Chul Choi of Hanho Heung Up Co., Ltd., and Youn J. Shin of Plus One Animation Inc. In particular, I appreciate President Choi's (Hahn Shin Corporation) kind, sincere, and speedy help in updating data on the current Korean animation industry.

I am also grateful to Denis Tanyol and George Simons (Ph.D. candidate in TESOL, Temple University) who took pains to proofread my dissertation. Especially, Mr. Simons was a good English teacher. His comments and notes improved my English writing. George was also a good friend and an angel God sent for encouragement and expectation. Thank you, George!

Lastly, but mostly, I am grateful to my wife Jiwon far beyond what these words can convey. Her encouragement, belief in my capabilities, and patience through many long discussions of the issues involved here enabled my work on this dissertation from start to finish. Jiwon was always ready for discussion whenever and wherever we were together. I am blessed to have such a wonderful friend and partner in my life. My two daughters, Haana and Haa-un, were a source of encouragement and hope. This dissertation coincided with their growth. It was difficult especially in the final busy days for me to hide myself from their eyes which were calling "Let's go out to play, dad." I thank God for giving me a wonderful family.

LIST OF TABLES

LIST OF FIGURES

LIST OF GRAPHS

TABLE OF CONTENTS

4. ECONOMIC ASPECTS OF THE KOREAN ANIMATION INDUSTRY

CHAPTER 1

INTRODUCTION

Background of the Study

Animation is a visual communication technique whose basic potential is to clarify the complex, to reveal the invisible, to teach quickly and concisely (Halas, 1976, p. 10). In addition, animation is an art form entirely different from 'live-action' filmmaking the central feature of it being that the movement is not the movement of the real world, but is hand made (Stephenson, 1967, p. 7). This hand made communication technique is nowadays globally collaborated. The global collaboration of animation production is the most significant characteristic in the production of animated cartoons (animation) in these decades.

According to *Variety*'s 1991 (May 27) special report, "International Animation--Big Bucks and New Rules Abroad," co-production deals involving multiple foreign partners are cropping up everywhere. Alongside these new partnerships, a new sensitivity to cultural differences seems to be developing. The days of American hegemony in animation are gone. The prime example of the new wave of animation production is Hearst Entertainment's "The Legend of Prince Valiant," a four-country co-production involving Hearst and the Family Channel in the U.S., IDDH in France, Polyphon Film und Fernseh in Germany, and Sei Young Animation Co. in Korea. The scripts, voice tracks, storyboards, direction and models for "Prince Valiant" are produced in Los Angeles by Hearst's animation division. The work then shifts to IDDH's animation studio in France, where key layouts and additional backgrounds are

done, before shipment to Sei Young in Korea, for inking and painting. Post-production efforts are completed in Paris under the supervision of Hearst and IDDH ("Special Report," 1995, p. 41).

This example demonstrates that a global division of labor exists in animation production. Today, South Korea shares center stage with Japan and the U.S. in the global assembly line of animation production. With forty years of history, the Korean animation industry now ranks as the third largest animation producing country in the world, behind the U.S. and Japan (see Table 1-1).

Table 1-1. International Animation Production in 1993

	Total Hours Created			Total Hours Subcontracted			Total (rank as a single country)
	Short Series	Features	Total	Short Series	Features	Total	
USA	2433	230	2663				2663 (1)
Canada	348	36	384				384 (4)
Japan	731	224	955	925	84	1009	1964 (2)
Europe	1704	143	1847	362	126	488	2335
Korea	**14**	**2**	**16**	**438**	**2**	**440**	**456 (3)**
Taiwan	6	1	7	346	6	352	359 (5)
China	24	5	29	272	0	272	301 (6)
East Europe And Asia		10	10	627	62	689	699
Total	5960	651	6611	2970	280	3250	9861

(C. Han, 1995b, p. 98)

The development of the Korean animation industry is the historical result of the international division of labor. It has grown by producing animation for overseas clients in the U.S., Japan, France, etc. The global division of labor has played historically significant roles in the formation of the Korean animation industry. Historical understanding of the Korean animation industry, in light of the global assembly line that supports the production of animation, provides an understanding of the formation of the international animation market which has relied heavily upon the labor of Asian animation workers. From the imperialist perspective, the global division of labor in the production of animation is a typical example of the "core (center)/periphery" world economic system, which is based on the international dependency relationship and the unequal exchange of resources and skills between countries (Wallerstein, 1974, 1979).

The international division of labor with the exchange of production skills between the core and periphery leads also to the question of the international homogenization of culture. Not only does consumption cause cultural homogenization, but so also does the production of other countries' products. Culturally, Korea's production of the animation of the overseas clients has resulted in Korea's adoption of, and adaptation to, its clients' production techniques. The international division of labor has led to standardizing cultural production, or cultural homogenization, between countries.

The Production Process of Animation

Rubin (1984) explains the process of animation production as the following. To begin, the director and head writer create a preliminary storyboard which roughly lays out in key drawings the proposed action and dialogue. Once the story has been sketched out frame by frame and approved. the camera crew films the animation and the animators make adjustments until the animation is satisfactory. This is known as the pencil test. Once this is completed. animators then trace these pencil drawings with ink onto punched celluloid plastic sheets called cels. These drawings are broken down into different layers with each character or moving image on a different cel layer. Next, the ink and paint department paints the cels. In a process known as opaquing, the paint is applied to the backside of the cel one color at a time.

At the same time, the animators draw the scenes which will serve as the backgrounds for the action. Once the director approves these drawings, the ink and paint department adds color to the background drawings. Only one background drawing is needed for each scene.

Once the background and cels are finished, they are ready to be filmed. Filming is a complex process. A special camera, called a flatbed camera, films the succession of cels against the appropriate background scene at the rate of twenty-four frames per second. The camera crew films each frame individually. Unlike live action movies where the frames are filmed to correspond to real time, cartoon animation requires that each frame be set up to match the preceding frame. As a result, a few seconds of animation may actually take several hours to film.

The flatbed camera is capable of movement. So, for any effects needed, such as a character walking a distance, the camera moves as the crew films each frame to give the illusion that the character is moving. Once completed, the animated film approximates the same movement as in live action film. When the camera crew finishes filming, actors or musicians record the soundtrack.

Term Definitions

In this dissertation, "animation" means "animated cartoons." They are created frame by frame by drawing them individually for the camera through the use of celluloid overlays (cels) (Hoffer, 1981). It is also called "cel animation." There are also paper animation, clay animation, puppet animation, etc.; the names result from the materials used for their production. However, this dissertation only covers commercially produced cel animation. Usually, there are three kinds of commercial animation: television series animation, animated features, and original video animation (OVA). This dissertation deals with all three of these.

"Cartoon labor" refers to the labor of producing printed and animated cartoons. In terms of making animation, cartoon labor can be specified as "animation labor." Animation labor has three divisions: pre-production, production, and post-production in accordance with the production procedure.

"Pre-production animation labor" includes scenario creation, character creation, storyboard construction, and layout.[1] The storyboard provides the basis for the layout. "Post-production animation labor" refers to the editing of filmed pictures, the recording of sound effects, subtitling, and producing a final print.

On the other hand, the "production" procedure of animation includes the labor of key animation[2], assistant animation[3], inbetweening[4], inking, painting (coloring), and filming. This labor is labeled "production animation labor." This production animation labor includes the subcontracted production of animation in Asian countries while The United States and Japan carry out the pre-production animation labor and the post-production animation labor.

"The global division of animation labor" is another term to be defined in relation to animation labor. Cel animation is perceived as requiring the division of the work force into different areas of specialization, which can isolate the creative artist from

---

[1] The layout artist creates drawings of shots in which the background elements of the action and camera moves are worked out and plotted (Neal-Lunsford, 1994, p. 219).

[2] The key animator uses the techniques of frame-by-frame filmmaking to give the artwork the illusion of movement. The key animator must have total knowledge of the camera in order to write comprehensive camera instructions (Neal-Lunsford, 1994, p. 217). The animator is often called the "key animator."

[3] This assistant animator adds to the rough drawings made by the key animator, leaving one or two in-betweens through for the inbetweener, and prepares the scenes for pencil testing (Neal-Lunsford, 1994, p. 217).

[4] The inbetweener is responsible for creating the drawings that fall between the extreme points of a movement. The assistant animators' assistant is given single tasks, usually doing single inbetweens, gradually working up to three, then five inbetweens (Neal-Lunsford, 1994).

the final work of art (Noake, 1988, pp. 86-87). The isolation of workers from their final products in animation production is pervasive on the global level, as is the case with "The Legend of Prince Valiant." Thus, the global division of animation labor implies international participation of animation laborers in the production of animation. The Asian countries mostly take the "production" part, which requires a great amount of labor.

Purpose of the Research

Scholarly Purpose

The actual size of the Asian animation industry is one of the best kept secrets in cartoon circles. In Japan, for example, thousands of volumes of comic paperbacks appear yearly, more than 10,000 people regularly attempt to become professional cartoonists, and the industry generates more than a billion dollars in revenue annually (Lent, 1995, p. 185). In Korea, the industry produced about $62 million worth of animation for overseas clients in 1993, $46 million for clients in the U.S., and about $3 million for those in Japan (Statistical report of Korea Trade Association in 1993, as cited in C. Han, 1995). Five years later (July 1997 to June 1998), the industry exported $115.13 million (Choi, 1999), making it the third largest animation producing country in the world. The Korean animation industry plays an important role in international mass communications, affecting both culture and economy through the huge scale of its business.

This dissertation, through its focus on the Korean animation industry, will contribute to the promotion of academic interest in the study of Asian cartoons and animation, as well as the study of comic arts around the world, by demonstrating the historical, economic, and cultural implications of the animation industry.

Recently, the economic and cultural importance of comics and animation as a means of communication has been rising very rapidly. The synergy of comics and animation has expanded into the music record industry, the publishing industry, the video game industry, theme park businesses such as Disneyland, the advertising industry, etc. As a result, a study of animation contributes to the need for theories that govern the economic and cultural implications of the international animation industry.

Social Purpose

There are very few people who know the enormous amount of anonymous labor that is necessary for the production of animation. By basing this research primarily on the analysis of labor in the production of animation, this dissertation provides a practical view of the current labor situation in the Korean animation industry. Korean animation workers have low wages and no job security because of the seasonal nature of their work and the low social regard for it. With respect to the international division of labor, the study of the labor in Korean animation is an important example of Asian workers, who devote their labor to the animation that the world enjoys.

Personal Purpose

As for the researcher's personal qualification, his bilingual ability and bicultural experience, will provide the most useful and effective research skills for this research. In addition, his participation in the 1995 Seoul International Cartoon and Animation Festival (SICAF) with the valuable help of the research grant of the Asian Studies Center at Temple University provided the researcher with a chance to look into the Korean animation industry, and to establish good relationships with some of its important people, a valuable asset in this research especially when updating industry data.

Research Questions and Techniques

Research Questions

This dissertation raises the following research questions.

Q1. How did the Korean animation industry develop historically, and what is the nature of the contemporary Korean animation industry?

Q2. What is the economic nature of Korean animation production in the world economic system, particularly in terms of domestic working conditions and internationally dependent development of the industry?

Q3. What is the cultural nature of the development of the Korean animation industry?

Q4. How has the Korean government's role affected the Korean animation industry both economically and culturally?

Research Design

This dissertation adopts a historical research method to effectively describe and interpret the collected materials with respect to the production of Korean animation. Three research designs are used in the study of mass communication history: descriptive designs, exploratory studies, and explanatory designs (Stevens and Garcia, 1980, pp. 16-25; Babbie, 1992, pp. 90-92). Descriptive designs deal with the growing and developing process of the mass media in chronological order. Exploratory studies consider the roles and functions of the media and media workers in politics, economy, technology, etc. Explanatory designs intend to explain the reasons by investigating the background of the growth and development of mass media, including the study of ideas and principles in communication history.

To define the dissertation according to its research designs, the major part of the dissertation relies on a descriptive and explorative examination of the global division of production labor as it effects the Korean animation industry. Thus, the facts described and the insights explored in the historical research design comprise the main body of the dissertation.

Selection Method of Literature Sources

The primary sources for this dissertation were collected in Korea, in 1995, by visiting the institutions of cartoon and animation production, and interviewing the people in the industry, the official censorship committee, cartoonist organizations, the animation production studio association, and comics research groups. These organizations and groups include the production companies, such as AKOM, Sunwoo, Seoul Movie, and Daiwon, The Korean Cartoonists Association, The Korean Animation Producers Association, "Uri Manwha Hyeobeuwhoe" (Association of Our Cartoons), and an experimental animation group "Nemorami" which is an animation production group in Hongik University.

The sources include information from the history of the old Korean comics and animation industry up to its current state. It was possible to collect actual comic books, comic magazines, pictures, video tapes, video clips recently and soon to be released, animated cartoons, animation companies' promotional brochures, and pamphlets which tell the history of overseas subcontracting as well as domestic animation production.

Korea's first exclusive animation magazine, *Animatoon* founded in 1995, provides bi-monthly much important information about the production of Korean animation. In addition, the completion of three master's thesis and a book in 1995 made that year an important year for the publication of academic research about comics and animation. This represents a significant movement in the field, considering that Koreans have long ignored cartoons as a serious research field.

The Internet, computerized databases, and references and bibliographies related to Korean cartoons and animation arts and industries provide secondary sources about the Korean animation industry. The dissertation of Neal-Lunsford (1994), *Animation: A Reference Guide* by Thomas W. Hoffer (1981), T*he Encyclopedia of Walt Disney's Animated Characters* by John Grant (1993). Charles Solomon's (1989) *Enchanted Drawings: The History of Animation*, and *Animation Magazine* provide good references for the history of labor in American animation. Additionally, Dr. John A. Lent (1996) provides valuable comprehensive bibliographies for Korean cartoons in *Comic Arts in Africa, Asia, Australia, and Latin America: A Comprehensive, International Bibliography*. In particular, Dr. Lent has provided the information about Korean mass communication since 1974 in the books: *Asian Mass Communication: A Comprehensive Bibliography* (1974, pp. 196-220), and *Global Guide to Media and Communications* (1987, pp. 36-37).

Current updated information about the Korean animation industry was accessed through the Chollian Internet service provided by the Korean Telecommunication and the Korean new organizations' information web sites of Digital Chosun, Electronic News, and other newspapers, magazines and broadcasting companies. Through these services, it is possible to search books and articles by subject, date, author, and title. In particular, the Association of Our Cartoons has collected full texts of the books, newspapers and magazines and compiled them into ten volumes under titles, such as "General Issues," "Animation," "Cartoonists," "Commentary Cartoons on Current Affairs," "Comic Arts in the World," etc.

Finally, other secondary sources were reviewed, such as Paley Library's Diamond catalog system of Temple University, and its research databases such as ComAbstracts, Comindex, Dissertation Abstracts, Film Index International, JSTOR for full text review, Online Computer Library Center (OCLC), Periodicals Abstracts, and Social Sciences Abstracts. In addition, the library's Electronic Journals service enabled the dissertation to access the databases of Asian studies, communications, art, computer and information science, sociology, history, and social science in general.

Research Techniques

This dissertation employed documentary analysis as a method of historical research, as well as interview and observation for the research.

As a qualitative method, documentary analysis enabled the researcher to master many subtle details on the global division of labor in the production of animation. A review of the historical records of this labor determined the nature of cartoon labor and identify any common patterns that recur at different times and places. The history of the development of comics and animation development was examined by comparing cases from Korea to those from the United States.

A rational interpretation of the historical records requires rigorous techniques of document analysis. A documentary analysis includes the "external" and "internal criticism" of the historical records and evidence collected for the dissertation.

The aim of external criticism is to determine the authenticity of evidence (Shafer, 1980, p. 41). The external criticism of documents essentially authenticates evidence

and establishes the accuracy of texts. Thus, it determines the authorship of evidence, which may prove or disprove the authenticity of the evidence (p. 41, p. 128). To satisfy the aim of external criticism the dissertation investigates the genuineness of the evidence, qualification of the author, the source of the author's report, originality of the evidence, possible biases in the documents, and the biased selectivity due to the categories employed in the documents.

Internal criticism determines credibility of evidence (p. 41). The check-list of internal criticism for the dissertation is as follows: the time of composition in relation to the time of observation of the matter reported; the audience for which the document is intended; the intent of the author (p. 83).

This research adopts interviewing techniques to acquire information about the current situation of the Korean animation industry. Interviewees were selected according to their representativeness in various aspects of the production of Korean animation. One of these interviewees was Donghun Shin, who is called the grand master of Korean animation. Wook Jung, who is the president of the Daiwon comics and animation group, and was one of the animators who produced "Hong Gil Dong," Korea's first animated feature, in 1967. Mr. Nelson Shin, a Korean-American animator and president of AKOM, initiated the production of animation for American clients in Korea. Currently, AKOM is producing "The Simpsons," "Invasion of America," and other American television animation shows. The researcher also interviewed independent researchers of Korean comic arts and animation, such as Cheongsan Lim, Gwangwoo Rho, Changwan Han, and Shinae Yun. The interviewees

also included professors in the cartoon department of the university, reporters, cartoonists, animation fans, and animation workers, such as directors, key animators, inbetweeners, inkers, painters, and so on. At present, there are seventy four animation companies in Korea; most of them are located in Seoul. Their addresses, telephone numbers, fax numbers, and e-mail addresses[5] were obtained at the Seoul International Cartoon and Animation Festival, in 1995.

The types of interview questions were designed to obtain the field data for the production of Korean animation: the background of the animation companies, working conditions (wage scales, promotion, job security, recruiting procedure), the educational background of the employees, previous occupational careers, domestic production, and foreign production of the companies.

There are three formats for interview techniques: (1) a structured or standard format in which the wording and question orders are already established, (2) an unstructured or nonstandard format which provides more freedom to the interviewer, (3) a semi-structured format which has question outlines with loosely composed questions according to the types of questions.

For this research, the semi-structured interview technique was selected. The semi-structured interview permits a flexible question format, so long as each question maintains the predetermined focal points. There were many unexpected interviews

[5] The researcher has already interviewed the important people in the Korean comics and animation industry. Also, the author has remained connected with them through email and fax.

during the conference and while in the real production field. Thus, the semi-structured interview was preferable.

To ensure the validity of survey research, Dr. John Lent, adviser for the dissertation, reviewed the questions in advance. To ensure the reliability of the interview method, the researcher used a 'test-retest method' and compared the difference between the two tests in the beginning stage of the survey in Korea.

Transliteration

Transliteration from Korean to English is primarily based on the 1994 transcription rule of The Korean Press Institute. The dissertation also refers to *Korea at a Glance* by Daniel Holt and Grace Massey Holt (1988). Romanization is based on standard Korean pronunciation. Words are written as they sound. In addition, alphabetic characters are used exclusively, with no pronunciation markers.

CHAPTER 2

LITERATURE REVIEW

Development of World Animation Production

The Origins of the Animation Production System

Solomon (1983) defines animation as an expression process that requires highly trained artists, sophisticated production equipment, film laboratories and editing facilities, distribution companies, and theaters. Animated filmmaking, to any degree, needs an industrialized economy for support (p. 141). However, the "expression process" is mainly based on the division of labor in nature, and is traced back to the first animation device 'thaumatrope' in 1825, invented by Dr. John Ayrton Paris and sold as a scientific plaything. It was a card disc with a picture of a bird on one side and a birdcage on the other. When the disc was twirled by means of strings attached to opposite edges, the viewer's eyes retained the image of one side as the other side was revealed; the result was that the two images were superimposed. As a result of persistence of vision, human eyes blend the separate images together. Finally, the bird appeared to be in the cage (Halas, 1987, p. 13; Neal-Lunsford, 1994, p. 12).

In 1832, a Belgian physicist Joseph Plateau invented the phenakitoscope, a revolving paper disc which had a figure pictured in different stages of movement spaced around it. When viewed through a mirror, they appeared to be one moving image. It was not until 1861 that Coleman Sellers in Philadelphia achieved a major breakthrough when he patented his kinematoscope, a stereoscopic viewer using a

paddle-wheel action to project continuous motion in rapid succession, which was arguably the first actual photographic animation device (Halas, 1987, p. 14; Hoffer, 1981, p. 9).

Later, Emile Reynaud in France, a showman, inventor and artist, was determined to improve the commercially exploited toys based on the persistence of vision principle. All the previous systems required the public to peep through rotating slits in order to watch the moving images. In 1877, however, Reynaud reversed the system. He used a circular cluster of revolving mirrors to reflect the drawings, which were on a horizontal band placed around the revolving drum. This time the onlookers were not required to look through anything, but could instead sit back and watch a relatively smooth moving picture projected via a series of mirrors. He called the device a praxinoscope (Halas, 1987, p. 14).

Reynaud developed the system more by adding a mirror-and-lens system to project the drawings onto a screen. The actual images were hand painted onto long strips of transparent celluloid. In order to keep the pictures steady, Reynaud punched holes onto the center of the celluloid strips between the frames which were kept in register with a metal claw as they rotated along in a loop format. The use of celluloid in animation was once again introduced some years later in New York by Earl Hurd, who patented his system in 1915. Today, animators still use his method of dividing a scene up into its component parts and painting each one onto a separate sheet of transparent material (Halas, 1987, p. 16). The animation was still jerky and only lasted a few seconds. Because the electric light was not yet fully perfected, the images from the

praxinoscope were usually illuminated by a flame which caused the picture to flicker and limited projection to only a few feet (Neal-Lunsford, 1994, p. 13).

While the phenakistoscope, praxinoscope, and other devices were popular as novelties or toys, cel animation would have to wait until the development of the motion picture camera and projector. In 1889, William Friese-Greene and Mortimer Evans were developing their 'box projector,' which was capable of showing four to five frames per second. Auguste and Louis Lumiere successfully projected live-action motion pictures onto a screen with their Cinematographe in March 1895 for a scientific society in Paris. For quite a long time, however, there was very little real distinction in the public's mind between live-action film and animated drawings or paintings. The essence of both was movement, and the idea of moving shadows and pictures on a screen was enough to enthrall audiences throughout Europe and the USA (Halas, 1987, p. 14).

In the late 1890s, a Frenchman, Georges Melies, began the production of a series of short films that would later influence the yet unborn animation industry. His films "Voyage to the Moon" (1902) and "The Conquest of the Pole" (1912) used special effects with superimposition and dissolves, and his stories aptly pursued revelations of the impossible and the surreal (Halas, 1987, p. 14). Combined with other special effects, Melies' films so startled early film audiences that he was even openly accused of practicing witchcraft (Heraldson, 1975, pp. 21-22, as cited in Neal-Lunsford, 1994, p. 14).

Melies' influence is evident in the early work of James Stuart Blackton, a newspaper illustrator and music-hall cartoonist whose career was languishing. Blackton, who was originally from Britain but settled in the USA, bridged the gap between animated cartoon (made in stop-motion, frame-by-frame technique with artwork and a fixed camera) and live-action film (photographed in continuous motion with a mobile camera). He is one of the most important early practitioners of trick photography as well as of animation. With the collaboration of an expert cameraman called Albert Smith, he constructed a camera for trick photography called the Vitagraph which was also to become the name of their film company. His film "Humorous Phases of Funny Faces (1906)," generally acknowledged as the first animated film, was a true animated cartoon with 'impossible' action where transitions of shapes and forms maintained the audience's interest. Blackton had taken a long time to make the film. He drew over 3,000 drawings and exposed them several times to achieve the desired effects (Halas, 1987, p. 19; Stark & Solomon, 1983, p. 12; Hoffer, 1981, p. 10).

Influenced by Balckton's 'magic,' Emile Cohl in France tried to go further. In his works, characters were little more than stick figures but had the ability to magically transform themselves into whatever shape they desired, all while suspending the laws of physics. Cohl's cartoon characters float freely in space, a house turns into a man, hens lay alarm clocks, a clown's head swells up like a balloon, and so on (Stephenson, 1967, p. 33). In addition, in terms of techniques, he developed a 'light-box' as an aid to exactly matching animated drawings. He had a sense of cartoon timing which few

of his predecessors possessed and much more drawing skill than his contemporaries. By drawing eight individual figures for each second of film (at that time projected at sixteen frames per second), he achieved an unprecedented fluidity of movement, setting a standard which still exist today (Halas, 1987, p. 20).

In April 1911, Winsor McCay finished his first cel-animation film entitled "Winsor McCay Makes His Cartoons Move: or Little Nemo," released by Vitagraph. McCay's animation cels were made of rice paper, not celluloid at that time. On each cel he drew the entire image and all the action, including the background or stationary portions, doing the same for each successive cel. His work was fully animated, which meant that for the sixteen frames in every foot of 35mm film, sixteen different drawings were photographed. For McCay, a cartoonist employed by the William R. Hearst organization, such painstaking and time-consuming work was an art form (Hoffer, 1981, pp. 10-11). What makes McCay's work distinctive is the nearly flawless execution of the drawings. Despite their magical abilities, the characters exhibit naturalistic motion. The illusion of depth is created by McCay's accurate and exacting use of perspective animation. Because McCay drew some 4,000 pictures for his film, the movements of the characters are extremely smooth and realistic, far superior to Balckton's crude chalkboard drawings or Cohl's stick figures (Heraldson, 1975, p. 32).

However, the animated film needed a new production procedure for the increasing audience. Winsor McCay's technique in using full animation was too laborious for the demands for film products on a regular basis and the emerging mass market. The

period 1912-1915 was clearly an important period for the American film history. The Motion Picture Patents Company was disintegrating and its power in mandating one- and two-reel films and its antifeature stand were failing in the face of independents' use of features and the promotion of the star system. The nickelodeon was being replaced by the "movie palace" in the large metropolitan areas, seating far more than the paltry one hundred or so patrons typical of those small five-and-dime theaters. The audiences for films also changed, adding others to the low-income and blue-collar Americans who had been entertained by the films for ten years. As theaters moved to better locations, and feature films introduced known or publicized stars, higher-income groups increased their attendance. Moreover, audiences were developing a habit of going to the movies as programs changed. Such regularity conditioned a production system which divided the labor so that several films could be manufactured in a short time, and given to distributors for release to theaters during an appropriate publicity campaign, with continued hype through the newspapers and newly formed fan magazines (Hoffer, 1981, p. 12).

Under these circumstances, John Ralph Bray and Raoul Barre had been working on a systematic method for producing animated cartoons faster without having to redraw everything in each frame, as had McCay. Barre divided up the labor in cartoon production, assigning various tasks to his staff, spending much of his time supervising their work. This model was refined and carried forward by Walt Disney in the early 1930s, supplemented with training sessions, pencil tests, storyboards, script conferences, and other devices to produce a single animated style.

But, in 1914, technology and economics conditioned a much simpler yet consistent approach in the Barre studio. Barre's "slash system" enhanced his division of labor by eliminating the expensive effort involved in redrawing everything in each frame, including the stationary portions of the action, as Winsor McCay had done in his animation up to about 1915. In Barre's slash system, only the moving portions of an action would be redrawn, with the stationary portion put on another cel. Barre also devised a uniform system of peg registration so the holes placed on each drawing would be perfectly registered with successive drawings, eliminating the annoying "jiggle" over the stationary part of the drawn image. His New York studio, organized in 1913, had great significance in the training of a new generation of animators, including Albert Hunter and Richard Huemer who would later animate for Disney. One year later, Bray formed an animation studio in New York City, and Earl Hurd and he pooled their patents, which enabled mass production of cartoons on a sound economic basis (Hoffer, 1981; "Bray-Hurd: The Key Animation Patents," 1988).

Bray revolutionized animation by turning it into an industry. Bray's revolution consisted of the development of several labor-saving methods, which, while they made the animation process faster and more economical, also diminished the aesthetic quality inherent in the work of McCay and his followers by infusing the cartoons with a simplistic "sameness." Bray was also quick to patent his ideas, which gave him a great deal of control over the animation process in the United States and earned him a great deal of money from royalty payments. Cartoon filmmakers who produced

outside the Bray studio were required to pay Bray for the use of his patented devices (Neal-Lunsford, 1994, p. 18; Callahan, 1988, p. 225).

Bray added to the assembly-line aspects of animation by patenting a method by which background art and other animation elements could be added to a scene without the necessity of having the artist redraw all the elements for each frame of the cartoon. While this was an improvement over existing techniques, Bray's fortunes improved considerably when he agreed to join with Earl Hurd in pooling their patents to form the Bray-Hurd Process Company (Crafton, 1982, p. 153).

Bray established his company at a time when the principles of "scientific management," espoused by Frederick W. Taylor (Taylorism), became popular. The ideas of scientific management were initially designed for assembly line operations in factories, in which the "system" was dominant (Deneroff, 1987, p. 2). In his 1912 book *Shop Management*, Taylor defined good management as "knowing exactly what you want men to do, and then seeing that they do it the best and cheapest way. The 'cheap men' were the backbone of industry" (Taylor, 1912 as cited in Crafton, 1982, p. 164).

The application of these principles meant that the work itself was broken down into smaller and smaller divisions, which in animation was promoted by the innovations embodied in the Bray-Hurd patents. Bray originated the concept of "inbetweening," with the animator drawing the extreme positions of movement and assistants drawing the movement between those extremes. In devising a previewing process, Bray claimed a patent on the process of flipping successive sheets to check

animation. In 1915, Earl Hurd proposed the use of transparent glassine sheets[6]. The moving parts were drawn on these sheets and placed in sequence over the background during each single-frame exposure by the camera. This process, along with Bray's achievements, revolutionized animation production well beyond 1915. Numerous refinements were continually devised, but the basic technology was available for such mass production to which the live-action American film industry was clearly geared. Max Fleischer's rotoscope process, in which live-action footage was traced onto cels, and Bill Nolan's moving background system were two of many improvements made later (Hoffer, 1981, p. 13).

The result of the Bray-Hurd system was an emphasis on increased production, stressing the system over the individual; and, at least in theory, the need for people of unusual talent was diminished (Deneroff, 1987, p. 2). The rigidity of the system went against the self-image of a number of workers who saw themselves as traditional "creative" artists, rather than as elements in an assembly-line process (p. 4). Often, cel animation is perceived as requiring the division of the work force into different areas of specialization, which can isolate the creative artist from the final work of art (Noake, 1988, pp. 86-87). In this sense, Crafton (1982) noted that the practical result

---

[6] According to Neal-Lunsford (1994), Hurd had obtained a patent for the use of clear sheets of celluloid in animation in 1915. The use of celluloid sheets had an enormous impact on the production of cartoons. Up to this point, animated cartoons had been drawn on rice paper or similar material. This made animation very labor-intensive, because each time a character moved, the entire picture, background and all, had to be redrawn.

of systematic management is a studio staff packed with untrained women and adolescents, where a low salary and a high turnover are the standard (p. 164).

Consequently, the Bray-Hurd patent system was a process whereby creative intellectual labor was transformed into simple physical labor, and whereby artists were treated as factory workers and rewarded with low wages. This treatment of labor resulted in extensive strikes beginning in the 1930s.

Labor Problems in the Bray-Hurd System

Sometime in the 1920s, the animation process was streamlined in the Max Fleischer organization. Inbetweeners were introduced, who filled in the action drawings between extremes drawn by the key animator. Newcomers to animation were initiated in a step process before being called animators. Beginners would become opaquers, then inkers, then graduate to inbetweening, thence becoming assistant animators and finally achieving animator, thereby establishing a division of labor (Hoffer, 1981, p. 195).

Because the division of labor forms the foundation for the Bray-Hurd patent system, the system requires an abundant labor force; this was not a big problem in the early stages of American animation production. Eventually, however, the Bray-Hurd system encountered labor problems as its sources of abundant and cheap labor began to dry up. Moreover, the system inherently treated animators as factory workers and rewarded them with low wages. In other words, the Bray-Hurd system is a system that

transforms creative intellectual labor into simple physical labor. These labor problems in the system resulted in extensive strikes by the workers.

This essential element of struggle between the producers and laborers was also present from the very start of the Hollywood era of film production. The first theatrical unions in the U.S. were formed in the 1890s, around the time of the invention of the motion picture camera and projector. Stage workers formed unions in their communities in response to exploitation by theatrical managers. Shortly after the theatrical stage workers organized and began receiving better wages and conditions, managers of theaters and theatrical production companies turned to motion pictures for increased revenues through lower labor costs. Motion pictures represent the stored labor of theatrical workers: actors, directors, and technical stage workers. A single performance before a camera provides a master copy from which hundreds of prints can be duplicated and distributed at a fraction of the costs involved in sending the same performance out on the road as a theatrical touring company. The unions responded by attempting to organize the workers in the new film industry (Nielsen, 1988, p. 121).

With the signing of a basic studio agreement by nine studios and five unions, the West Coast film industry in the United States became unionized. While the event seemed to bring about a hiatus in the industry-labor tensions, the next twenty years would involve additional strife with the non-represented groups: actors, animators, and directors desiring standardized agreements (Hoffer, 1981, p. 196).

In this context, as a part of movie industry, American animation workers have also had a long history of walkouts. The first turmoil broke out at the Fleischer Studio in 1937 and then at Walt Disney Productions in 1940. One hundred Fleischer employees affiliated themselves with the Commercial Artists and Designers Union and went on strike, complaining that Fleischer refused to negotiate. The strike began on May 7, 1937, and was settled in October 1937 (Hoffer, 1981, p. 201; Deneroff, 1987, p.2; Lent, 1998, p. 6). The Fleischer Studio was a studio based in New York City. Founded in 1929, it produced animated cartoons for distribution by Paramount Pictures. Fleischer enjoyed considerable success during 1930s producing Betty Boop and Popeye cartoons (Deneroff, 1987, p. 1). In the Fleischer strike in 1937, the death of Dan Glass, an inbetweener in the studio, further intensified the strike. He died from tuberculosis and many employees thought that the low wage and long working hours were the main reasons for his death. The strike continued into the early 1940s (p. 5).

The strike contributed to the decision to move Fleischer studios to Miami, Florida, and to Fleischer's losing control of the company to Paramount. In a broad context, the walkout by the Commercial Artists and Designers Union was also the first overt manifestation of widespread labor unrest in the American animation industry. It was the result of unrest that had been simmering for several years, and did not quiet down until 1943, when the Screen Cartoonists Guild, which picketed the Disney Studios in May 1940, finally organized all the major studios (Deneroff, 1987, p. 1). The low pay scale at Disney made animators desperate for a union contract in 1940. This led to a strike a year later and provoked Walt Disney to react vindictively by firing the union

organizers of his art staff and labeling them communists. Schlesinger, MGM, and Warner also felt the effects of an employee walkout in the late 1940s (Lent, 1998, p. 6).

At Fleischer Studio, wages in the 1930s began at $12 per a forty four hour week as an opaquer, the initial job for all employees. The next step was inking, which paid $16 to $18 maximum per a week, and $20-$22 for an inbetweener before 1939. However, a fledgling animator received $100 per week in 1930 (Lent, 1998, p. 2). In the case of Disney, salaries in the 1930s and early 1940s, ranged from $17 to $26 a week for inkers and inbetweeners (Lent, 1998, p.3). At present, according to Deneroff (1994, as cited in Lent, 1998, p. 2), major studios in the U.S. hope to recruit and retain class "A" animators by offering up to $2,200 a week, twice the union minimum.

Farming-out the U.S. Animation Production

As the entire American industry faced a crisis, with the collapse of movie chains and the emergence of the topsy-turvy world of television in the 1950s, cartoon production and exhibition costs skyrocketed (between 1941 and 1956, production costs rose 225 percent and rental receipts only fifteen percent). As a result, the big studios cut spending on less profitable areas, such as cartoons, when they found they could re-release old cartoons at ninety percent of the earnings of a new one. MGM closed its cartoon studio and laid off all its animators, but Bill Hanna and Joe Barbera shifted their work to television, where many of the animators had gone, often to do commercials. Hanna and Barbera also revolutionized production by converting from

full to limited animation and, eventually, sending much of the work overseas. This export of work followed the trend of many American industries in the 1960s, who were shifting to offshore production (Lent, 1998, pp. 6-7).

Hollywood's first offshore animation was done by Japan in the early 1960s. During the 1960s and early 1970s, other countries joined Japan in the production of foreign animation, notably Taiwan, South Korea, and Australia (Lent, 1998, p. 7). According to *Variety* (1991), Wang Film Production in Taiwan is the largest animation studio in Asia with almost 1,000 people on the payroll. Wang's biggest client is Warner Bros., but it also does work for most major international buyers. Wang has created an excellent worldwide reputation by providing a consistent supply of quality cartoons, TV shows, and movies for its clients in Japan, North America, and Europe ("Special Report," 1991, p. 41).

Finally, the Motion Picture Screen Cartoonists Local 839 (Hollywood) claimed up to 75 percent of animation work was being exported to other countries where costs were lower. In mid-August in 1979 more than 800 animators and associated personnel went out on strike, protesting the runaway cartoon production in Taiwan, Korea, and Spain. An "antirunaway" clause was agreed to for inclusion in an industry-wide package for the first time (Hoffer, 1981, p. 226).

The history of the development of animation production skills shows that animation was moved from arts to industry, from labor-intensive one man production to a hierarchical labor-division with hundreds of people, and from domestic production to international cooperation through subcontracting.

Theoretical Background of Economic Implications of the International Division of Animation Labor

As we can see in the origins of the animation production systems, animation as a form of mass media currently requires stable, skillful, and cheap labor worldwide for its mass production at a fast speed. During the years of the international division of animation labor, the history of the Korean animation industry primarily raised the questions of "mass media and national development" in the sense that the development of the industry has been in the context of Korea's economic development after the Korean War (1950-1953).

The notions of development primarily focused on the informational roles of mass media in the developing countries as shown in *Communication and Political Development* (Pye, 1963), *Mass Media and National Development: The Role of Information in the Developing Countries* (Schramm, 1964), and *Communication and Change in the Developing Countries* (Lerner & Schramm, 1967). Also, the studies of its development concentrated on the consumption of "cultural informational outputs as embodiments of the ideological features of the world capitalist economy" (Schiller, 1969, p. 6).

The aspect of "development" in animation as a form of culture industry is also related to the tension between the developed and the developing countries in the world. This tension led Wallerstein to broaden Marxian notion of class conflict into a problem of global conflict centering on the international division of labor (R. Lee,

1994, p. 43). This tension is emphatically studied from the imperialistic perspective in the mass communication area under the category of "cultural imperialism" (Schiller, 1969, 1976) and "media imperialism" (Boyd-Barrett, 1977). Originally, those imperialism perspectives are based on the existence of imperial centers in the global economic system, which controlled goods, services, and capital from those centers to nations on the periphery of the system (Stevenson, 1988, pp. 37-38).

Division of the World Economy between Core and Periphery

The Korean animation industry developed by providing the overseas clients with cheap, talented, and stable labor. It is pointed out that industrial capital promotes a division of labor suited to the requirements of its chief centers in modern industry. The division of labor springs up and converts one part of the globe into a chiefly agricultural field of production, for supplying the other part which remains a chiefly industrial field (Karl Marx as cited in Chilcote, 1974, p. 15). The Marxian notion of division of labor and the requirement of chief centers suggests the strong relationship between the international division of labor and the division of the world system into center and periphery.

Prebisch apparently first referred to "center" and "periphery" in his lectures in 1944 (Chilcote, 1974, p. 24). That is, he divided the world into two parts, a center of industrialized countries and a periphery of underdeveloped countries. He believed that long-term deterioration in terms of trade in the periphery caused by distortions in international demand and supply would impede development in the periphery as

capital goods and other manufactured imports became expensive and exchange earnings declined (pp. 23-24).

On the other hand, Wallerstein (1974) defined a world system as a unit with a single division of labor and multiple cultural systems. He points out that the capitalist world system is divided into three tiers of states, those of the "core," those of the "semi-periphery" and those of the "periphery." The essential difference between these is in the strength of the state machine (governments) in different areas, and this, in turn, leads to transfers of surplus from the periphery to the core, which further strengthen the core states (Wallerstein, 1974, p. 390 as cited in Brewer, 1986, p. 165).

According to Wallerstein (1979), the core-periphery division is maintained by the ability of the core states to manipulate the workings of the system as a whole to suit their needs (within limits). They deliberately weaken peripheral states or eliminate them by conquest, and also alter the workings of markets by imposing monopolistic restrictions, protecting their own industries and forbidding corresponding protection in the periphery. For Wallerstein, the 'semi-periphery' is a sort of 'labor aristocracy' of states or geographical areas. Without it, a world system becomes polarized and liable to revolt, while an intermediate tier diffuses antagonisms. New core states can emerge from the semi-periphery, and it is a destination for declining core states (Wallerstein, 1979 as cited in Brewer, p. 166).

Wallerstein's notion of periphery and semi-periphery implies several important points of the Korean animation development. As he indicates, the roles of governments have been essential for the Korean animation industry as a semi-

periphery now in the world assembly line of animation production. In this context, also, the industry has developed from periphery to semi-periphery in its forty year history through subcontracting core states animation work.

Cultural Imperialism and Its Theoretical Implications

The idea of cultural imperialism has risen to reexamine and even deny the Western concept of traditional development in the third world in relation to communication development (Robertson, 1988), as in the actual field research Commonwealth Caribbean (1717-1976) by John A. Lent (1977) in his book *Third World Mass Media and Their Search for Modernity*. In particular, American "cultural imperialism" has been argued most emphatically by Herbert Schiller (1969) in his book, *Mass Communication and American Empire*. His and related work is also well summarized in *National Sovereignty and International Communication*, (Nordenstreng and Schiller, Eds., 1979). Over the years Schiller and a growing band of supporters moved away from the simple view that the U.S. government was the guiding force behind this new colonialism and toward the transnational corporation (TNC) or multinational corporation (MNC) as the chief villain. By the mid-1970s, a new element was added to this argument—the conceptualization of the United States as an "information society" or "information economy." In this view, the decline of Western or American political and economic power was offset by information, the new medium of wealth and influence (Stevenson, 1988, pp. 36-37).

On the other hand, cultural imperialism started with the premise of dependency theory based on the global economic system which implies imperial centers, notably the United States, controlling the flow of goods, services, and capital from those centers to nations on the periphery of the system. Economic development at the periphery—mostly Third World countries—was shaped to strengthen the dominance of the center nations and to maintain the peripheral nations' positions of dependence (Stevenson, 1988, p. 38).

Schiller (1976) defines cultural imperialism as the sum of the processes by which a society is brought into the modern world system and how its dominating stratum is attracted, pressured, forced, and sometimes bribed into shaping social institutions to correspond to, or even promote, the values and structures of the dominating center of the system (p. 9). Particularly in the actual context of cultural dependence, Lent (1977) stresses the autonomy of the peripheral (developing) countries, such as the case of Commonwealth Caribbean:

> It must be remembered that the developing countries themselves made the final decisions concerning their relationships with foreign media. Foreign conglomerates do not forcibly take over media plants; they just make island governments and media personnel offers that are too attractive to turn down. Along the same lines, island media are not required, legally or otherwise, to purchase or subscribe to foreign news and entertainment services. Instead, they do so because they feel that large, foreign concerns can offer a better product than the island media can produce, and do so at a lower cost (p. 315).

Similarly, Dagnino (1973, as cited in Schiller, 1976, pp. 16-17) explains that the effects of cultural dependence on the lives of Latin Americans are not a consequence of an "invasion" led by a foreign "enemy," but of a choice made by their own ruling

class, in the name of national development. Through this choice, national life and national culture are subordinated to the dynamics of the international capitalist system, submitting national cultures to a form of homogenization that is considered a requirement for the maintenance of an international system.

In this sense, the international homogenization of culture is well discussed in the particular research example of *How to Read Donald Duck: Imperialist Ideology in the Disney Comic* (Dorfman & Mattelart, 1975). The ideological imprint of the main centers of the capitalist world economy is typically represented in the Disney products:

> Disney, like the missionary Peace Corpsman or "good-will ambassador" of Public Relations men, has learned the native languages -- he is fluent in eighteen of them at the moment. In Latin America he speaks Spanish and Portuguese; and he speaks it from magazines which are slightly different, in other ways, from those produced elsewhere and at home. There are, indeed, at least four different Spanish language editions of the Disney comic. The differences between them do not affect the basic content (p. 14).

This study of Dorfman and Mattelart found a particular view of peoples in developing countries which reflected dominant American stereotypes of foreigners, and expressed a morality which was wholly supportive of American foreign policy objectives. The Disney comics were deemed to function as an 'innocuous' tool of imperialism.

The ideas and perspectives of the core-periphery world economic system and cultural imperialism give the Korean animation industry a chance to see that its production systems and technologies have been dependent upon the imperial centers,

and the industry has been induced to limit its production to actual drawings for animation, not going further into pre-production and post-production. In particular, the underdevelopment of pre-production (character development, creation of stories, etc.) resulted in an imitation of client countries' animation in the early period of the recent prosperity in the mid-1990s. In addition, learning the styles and fashions of the center countries' animation through subcontracting also led the industry to be similar with them. Historically, the animation production system and skills have been transferred from the developed client countries for forty years. Recently, however, the animated features domestically created were criticized for their similarities to one of the industry's major client countries, Japan.

Media Imperialism and Its Theoretical Implications

In the context of cultural imperialism, "media imperialism" was separately termed by Oliver Boyd-Barrett (1977) to distinguish it from cultural imperialism and to focus more on discussion about specific roles of mass media in the international communication system. Boyd-Barrett's article on media imperialism and analysis of media systems explores the usefulness of the cultural imperialism approach in relation to the media. Jeremy Tunstall (1977) offers a global perspective, giving numerous cases. Boyd-Barrett (1977) defines media imperialism as a process whereby a country's media ownership, structure, distribution, and content are dependent on considerable pressures of the other country's media interests even without a mutual exchange of media products.

There are two important characteristics in the international roles of mass media. The one is the one-way flow of media products in the world; for instance, great amounts of media products are imported to Asian countries from the United States, not vice versa. The other is the matter of media ownership which is monopolized by a few developed countries (Boyd-Barrett, 1979, p. 117).

On the other hand, C. Lee (1980), Boyd-Barrett (1979), Katz and Wedell (1977), Lent (1987) revised the deterministic perspective of cultural imperialists who just reduce cultural dependence to economic dependency. The cultural imperialists intend to apply the economic domination-dependence relationship to whole parts of culture. Accordingly, cultural imperialism underestimates the autonomy and inner dynamics of the third world countries. In particular, C. Lee (1980), as in the previous case of Lent (1977) and Dagnino (1973), complains that cultural imperialism unduly emphasizes the dysfunctional aspects of the Western media. He points out that concerted efforts are made by the third world countries, and they creatively use traditional media and modern media to overcome dependence upon the Western media.

In addition, it is very suggestive to take a look at Hamelink's (1983) conceptualization of media imperialism in terms of "cultural autonomy" and "cultural synchronization." According to him, cultural autonomy is the ability of a country to decide on the allocation of resources in their symbolic, social and instrumental environment, which was the essence of cultural survival. Cultural synchronization is the global homogenization of cultures with a unidirectional flow of cultural products from the dominant to the subordinate cultures, where the cultural symbols and patterns

favor the former. The important point of cultural synchronization implied that the decisions on resource allocation were determined extraterritorially.

According to the literature review, the Korean animation industry can be examined in terms of systematic dependence of the industry in the core-periphery world economy system. In light of production, the international division of animation production labor is a result of core-periphery world economy system. The core countries try to secure not only cheap and stable labor but also expansion of their cultural domination in the world communication system. By means of international subcontracting, Korea started in the beginning as a periphery in the world animation production system. However, it now takes a position of semi-periphery which makes concerted efforts to overcome technological and cultural dependence upon the client countries by creating its own animation for both domestic and overseas animation markets, as well as becoming a client country to the cheaper labor countries.

In terms of consumption of animation, Korea is heavily dependent upon the animation of its client countries, such as Japan and the United States. As an ironical result, the Korean people enjoy watching the foreign animation in the production of which the Korean animation industry's efforts are embedded.

Theoretical Background of Cultural Implications of Development of the Korean Animation Industry

Subcontracting as Disruption of the Creative Process

The mass production of animation separates, through a division of labor, the efforts of animation artists from their final works (Noake, 1988, pp. 86-87). The international division of animation labor extends the separation to the extent that there is a disconnection between the original artists and the real drawers who make pictures for the individual movements of animation. According to Edelman (1979), this may be called "soulless product" by "soulless labor." He argues that, in the case of a photographic negative, the product is soulless because only the machine works. His idea is that the (creating) subject must always be present in the creation process (p. 45). Once he disappears, then, quick as a flash, his absence will designate his nature—he was "mechanical" (p. 46).

In contrast, Roland Barthes (1977) and Michel Foucault (1979) claim that the work itself is alive even without regard to its creator (author). They argue that there is no need to take the creator into consideration when one interprets the meaning of the work. Barthes contends that the author is dead as far as interpretation of the work is concerned. He complains that we always seek an explanation of a work in the individual who produces it, as if the explanation were always rooted in his life (p. 143). This interferes with the reading of the text, which is drawn from the innumerable centers of culture (p. 146). Thus, to give a text an Author (emphasis on the capital

letter in the original text) is "to impose a limit on the text, to furnish it with a final signified, to close the writing," he argues (p. 147).

Barthes emphasizes the polysemy, the multiplicity of reading, in each text. In this sense, he contends that we should recover the reader's rights by removing the Author from the text. He asserts that a text is made of multiple writings, drawn from many cultures and entering into mutual relations of dialogue, parody, contestation. There is, however, one place where this multiplicity is focused and that place is the reader, not the Author. Further, he argues that cost for the birth of the reader must be the death of the Author (Barthes, 1977, p. 148).

If we apply Barthe's ideas to animation, we can infer that there is no author's function in terms of multiplicity and polysemy of the animation as a text because neither the originator nor the subcontractor can regulate the consumers' interpretation of the animation.

Foucault (1979) also points out that the author is not an indefinite source of significations which will fill a work: the author does not precede the work, he is a certain functional principle by which, in our culture, one limits, excludes, and chooses (p. 159). Like Barthes, Foucault regards the author as a regulator of the production of meaning. Thus, he argues that it does not seem necessary for the author-function to remain constant in form, complexity, and even in existence. He even predicts that as our society changes, the author-function will disappear and the fiction and its polysemious texts will once again be subject to wider interpretations (p. 160).

The theoretical focuses of Edelman, Barthes, and Foucault are all reduced, negatively or positively, to the notion of separation of the authors or creators from the texts or the works they produce. Here, what we can draw from their ideas is that the conceptual relationship between the author and his work can be disconnected. In terms of the animation production process, the separation between the originator and the real drawing work becomes more evident through the subcontracting process based on the international division of labor. As a cultural text, animation is supposed to be free from its creator for its multiplicity of meanings to become evident, according to Barthes and Foucault, whereas, according to Edelman, it is soulless as long as it is made away from its original creator. In this context, the production of subcontracted overseas animation puts the Korean animation industry in a more complicated position: the simulated homogenization of culture worldwide.

Cultural Simulation and Homogenization

McLaren (1995) points out that as capitalism expands, standardization, routinization and streamlining come into play in the global assembly line. Culturally, this trend is leading to a single unifying, global culture, McLaren contends. On the other hand, Harvey (1994) argues in his discussion of postmodern conditions that what is at stake is the analysis of cultural production and the formation of aesthetic judgments through an organized system of production and consumption mediated by sophisticated divisions of labor, promotional exercises, and marketing arrangements (p. 346).

On the other hand, Roland Robertson (1992) points out that in both North America and Europe, and, in a less clear-cut way, in Asia, economic and extra-economic factors are intertwined with trends toward multiculturality and polyethnicity within nations and mega-nations (p. 185). Robertson further argues that there is a mythology about globalization. Among the myths are "disappearance of time and space," "global cultural homogeneity," "bigger is better," "the new world order," "economic determinism," and "saving planet earth." Contemporary globalization involves considerable increase in global complexity and local density (p. 188; Lent, 1980).

In terms of an innocuous tool of imperialism, it is very suggestive to take Robertson's (1992) concept of "glocalization"[7] into consideration. Glocalization is a process in which commodity forms are globally disseminated without an immediate distortion of local cultures. In this context, the semi-periphery can be regarded as "glocalized" periphery in the sense that it has potentials as both the past periphery and the future core. Raymond Lee (1994) contends that multinational agencies are most powerful in "glocalization" by reconstructing cultural problems into technical problems. In this sense, the Korean animation industry has been "glocalized" by taking a serious part in the global assembly line of animation production.

Robertson's idea of globalization is also well stated in R. Lee (1994), who contends that cultural production and consumption based on a standardized exercise of the division of labor in fact creates intermixing of global commodity forms with local cultural contents, which he calls "hyper-commodification through 'glocalization,'"

[7] The term "glocalization" is combined with the following terms: "global" and "local."

forming a type of resistance to Western cultural hegemony. That is, globalization does not necessarily produce cultural uniformity but stimulates cultural reinvention (p. 33). Hyper-commodification is the spread of the commodity form into all spheres of life, negating the distinction between commodified and non-commodified areas. "Style" and "life style" are products of hyper-commodification, just as "taste" is a product of an early phase of commodification. Style follows the erosion of institutionalized cultural authority. Thus, hyper-commodification includes globalized standardization and also specialization at the same time (Crook et al. 1993, pp. 60-61).

The idea of glocalization is also expressed in Jonathan Friedman's notion of "strong globalization" and "weak globalization" (Friedman, 1994). Weak globalization requires a stable frame of global reference, one that applies different parts of the global system to the same set of expressions or representations. Weak globalization refers merely to the existence of a global field of reference, to access beyond local communities, territories, states and regions to a wider arena. It requires that the local assimilates the global into its own realm of practiced meaning, while strong globalization requires the production of similar kinds of subjects on a global scale. The homogenization of local contexts is the prerequisite for strong globalization, so that subjects in different positions in the system tend to attribute the same meaning to the same globalized objects, images, representations, etc. (pp. 203-204).

As suggested in the notions of glocalization and the weak and strong globalization, the global spread of capital and technology is not an automatic, unreflective process.

Development in the Third World is culturally reactive and does not necessarily conform to macro-models of economic causation. Thus, there occurs a cultural paradox in the Third World industrialization: the more intense the drive towards industrialization, the more ambivalent the cultural attitudes towards the First World (R. Lee, 1994, pp. 43-46). On the other hand, according to Bamyeh (1993), development refers not to an objectively definable economic condition of a society, but rather to the absence of distinctions between the core and the periphery with regard to well-being. Development in this sense denotes not an abstraction like "prosperity" per se, but rather the abolition of global inequalities (p. 44). Then, the global inequalities of cultural well-being are abolished by the emergence of cultural intermixing between the core and the periphery, between the First World and the Third World.

Also, modernity is being simulated in the developing countries in the sense of an empirical replication of technology without the abstraction of authenticity. Globalization speeds up this simulation through a process of repetition in which the original model of modernization is no longer apparent or central to current activities (R. Lee, 1994, pp. 29-30).

Specifically, Baudrillard claims that in contemporary postmodern society reality has dissolved into fragments, and subjects are in the process of disappearing (as cited in Best and Kellner, 1991, p. 257). Further, according to Baudrillard's scheme, it does not matter if needs are true or real, or if labor is free or unalienated, since such ideas are locked within productivist logic. He contends that the genuine revolutionary

alternative for the productivist logic is a symbolic exchange that breaks with all utilitarian ideas (p. 115).

Symbolic exchange is based on the artistic forms which have proliferated to such an extent that they permeate all commodities and objects so that by now everything is an aesthetic sign. The Western industrial world was previously marked by "explosion," by expanding production of goods, science and technology, national boundaries, and capital, as well as by the differentiation of social spheres, discourses, and values. Modernity's explosion thus included new technologies, product differentiation, and a constant proliferation of goods and services, while all aesthetic signs coexisted in a situation of indifference based on what Baudrillard called "implosion" (Best & Kellner, 1991, p. 136).

Baudrillard's theory of implosion describes a process of social entropy leading to a collapse of boundaries, including the implosion of meaning in the media and the implosion of media and the society in the masses (Best and Kellner, pp. 120-121). For example, in "infotainment" the boundaries between information and entertainment collapse (p. 120). The implosion of boundaries and differences also brings about cultural intermixing by glocalization, while the internationally divided labor transfers the code of production from one country to the other, from the core to the periphery, and vice versa.

In terms of transferring the code of production, Baudrillard (1988a) contends that production is the dominant scheme of the industrial era, while simulation is the dominant scheme of the present phase of history, governed by the symbolic code (p.

135). Simulation threatens the difference between "true" and "false," between "real" and "imaginary" (Baudrillard, 1988b, p. 168). In addition, simulation is no longer that of a territory, a referential being or a substance. It is the generation by models of a real without origin or reality: a hyperreal (p. 166). It is no longer a question of imitation, or of reproduction, or even of parody. It is rather a question of substituting signs of the real for the real itself (p. 167). Dews (1987) defines "hyper reality" as "more real than real." This kind of reality is not surreal, or unreal, but a hallucinatory resemblance, in which two different categories are merged as in the case of implosion of "infotainment."

When we apply these ideas to the global division of animation labor, it is interesting to find that the labor division of cultural products such as animation not only transfers the code of the sign system penetrated into the product, but also produces simulated homogenization through sharing the transferred sign system. Baudrillard's ideas can interpret international homogenization of culture as a result of transferring and producing sign systems through the international division of labor, which helps a country internalize other countries' cultural codes, or even substitute its domestic signs with those of the overseas countries, producing cultural simulation. When one country's cultural products are simulated with the other country's cultural tastes, there is no real difference of culture between the two countries because the culture is intermixed and then becomes a reinvented simulation of hyper reality. Then, notions of dependence or development, or even cultural invasion of the imperialist center, do not matter anymore.

In this context, ideas of cultural homogenization and simulation may provide a chance to flesh out the idea of cultural imperialism, which is oriented to materials, their distribution, and the political and economic structures of domination (Schiller, 1976, p. 107). According to Edelman, Barthes, Foucault, Robertson, R. Lee, and Baudrillard, the internationally simulated homogenization of culture affects not only global production and reproduction of cultural products, but also the internalization and implosion of the cultural codes of sign systems between countries.

CHAPTER 3

HISTORICAL ASPECTS OF THE KOREAN ANIMAITON INDUSTRY AND ITS CONTEMPORARY PROFESSIONALIZATION

Introduction

South Korea shares the center stage with Japan and the United States in the global assembly line of animation production. With forty years history, the Korean animation industry produces thirty percent of the world's animation, ranking third behind the U.S. and Japan (C. Han, 1995a, p. 262).

Yet, the Korean mass media are heavily dependent upon imported works. For example, Korean animation cable television stations, the first of which started in 1995, are so dependent upon Japanese animation that they consistently violate the thirty percent limit the government has placed on the use of foreign animation. Moreover, the Korean animation industry has been structured by the needs of overseas clients, not the demands of a domestic market. Some of this has changed since 1994, when Korean animators made important moves to create and appeal to a domestic market, producing their own animation and participating in government-sponsored festivals.

Development of the Korean animation industry is a historical result of the international division of labor, growing through its production of animation for overseas clients in the United States, Japan, France, and other countries. Thus, the Koreans have participated very actively in the formation of a global animation assembly line that has heavily relied upon Asian labor.

This chapter looks at the history of the Korean animation industry, examined in light of the production of domestic and overseas subcontracted animation, which have at various terms both cross-fertilized and harmed one another. The birth of Korean animation followed four directions in turn—1) commercial advertising, 2) educational and artistic animaiton, 3) animated features, and 4) television animation. That is, Korean animation started with commercial advertising animation in 1956, and the first artistic animation arose in 1961 by the National Movie Production Institute. Later, in 1967, Korea's first animated feature was produced. Twenty years later in 1987, Korea's first television animation was produced by the Korean Broadcasting System (KBS).

Korean people were exposed to foreign animated features since June 13, 1957, when the imported "Peter Pan" (see the poster below) was shown in Seoul. Later, "Gulliver's Travels" was presented in May 1961, "Arabian Nights" on January 3, 1962, and "Cinderella" on July 26, 1962 (S. Whang, 1992, p. 191)[8] The first television animation series in Korea was the American "Dennis the Menace," broadcast by KBS[9] in August 1964. Four years later, the Tongyang Broadcasting Company (TBC) and the Munwha Broadcasting Company (MBC) broadcast the Japanese television show,

---

[8] Y. Choi (1995) contends that "Peter Pan" was shown in 1958, "Arabian Nights" in 1962, and "Cinderella" in 1963 (pp. 121-122).
[9] KBS started its broadcasting on December 31, 1961.

Yogwe Ingan," by Jeil Dongwha, partly made in Korea,[10] and "Marine Boy" by Mu Productions, respectively (Y. Choi, 1995, p. 123).

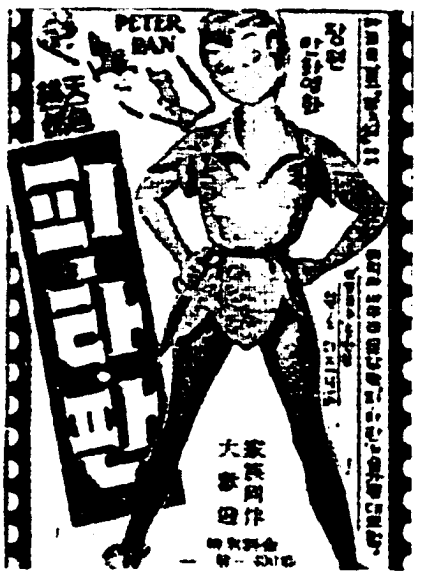


Figure 3-1. Poster of "Peter Pan."
(Whang, 1992, p. 192)

The regularly imported animation shown either in theaters or on television interested Koreans in animation as a new entertainment form to enjoy as well as to produce. In particular, the animation broadcast on the American Forces Korean Network (AFKN) became a good textbook for pioneer animators in those early days.

[10] While the production of domestic cartoons has not grown steadily, that of overseas animation by subcontract has prospered since its beginning in 1966, when TBC began subcontracting for the Japanese animation show, "Golden Bat" (Jung, 1994, p. 5). However, the real rush to subcontract for Japanese animation began in 1973, while subcontracting for Hollywood studios was initiated in 1969 (S. Whang, 1992, p. 207).

Nelson Shin (1996b), for example, was stimulated to explore American animation and tried to learn its skills (p.79).

Early Ages of Korean Animation

Birth of Commercial Animation

Early Korean animation was born out of a need for advertising films. The very first Korean animation was an advertisement for "Lucky Toothpaste," made by Dalbu Mun in 1956 (C. Park, 1997; "Yeoksajeok Inmureul," 1998), as a response to the box office success of the local showing of "Peter Pan." The black and white commercial was carried on the two-year old HLKZ TV where Mun was an art director. He worked alone, using rudimentary equipment, including a steel camera to put the pictures on film. This first Korean animation trailed by half a century the efforts of Emil Cohl who made the first French animation, "Fantasmagorie," in 1908 (Brasch, 1983, p. 9)[11], and Winsor McCay's first American animation, "Gertie, the Dinosaur," in 1909 by a half century (Halas & Manvell, 1971).[12]

Among other animated advertisements of soaps, medicines, drinks, etc., the most memorable was "Jinro Soju" in 1960. The Jinro liquor company was excited about animation as a new advertising tool, and "Jinro Soju" by Donghun Shin and Neungpa

---

[11] Emile Cohl of France directed the animation, a drama with matchstick figures and about 700 drawings were used in the short film.

[12] In 1906, Start Blackton, reporter-cartoonist for the New York Evening World produced for American Vitagraph Studios "Humorous Phases of Funny Faces," now regarded as the first animated cartoon, which consisted of a series of crude animated scenes drawn on a chalkboard (Solomon and Stark, 1983, p. 12; Hoffer, 1981, p. 10). "Gertie, the Dinosaur" was, in fact, copyrighted in 1914 (Hoffer, 1981, p. 19).

Shin was the initial result of that excitement (Y. Choi, 1995, p. 122; "Nelson Shin whoejang," 1997). Part of "Jinro Soju's" success related to its theme song, popular among Koreans for years (I. Kim, 1995, p. 57). The advertisers made full payment to the animators in advance and even rented a working room for them (S. Han, 1995, p. 86).

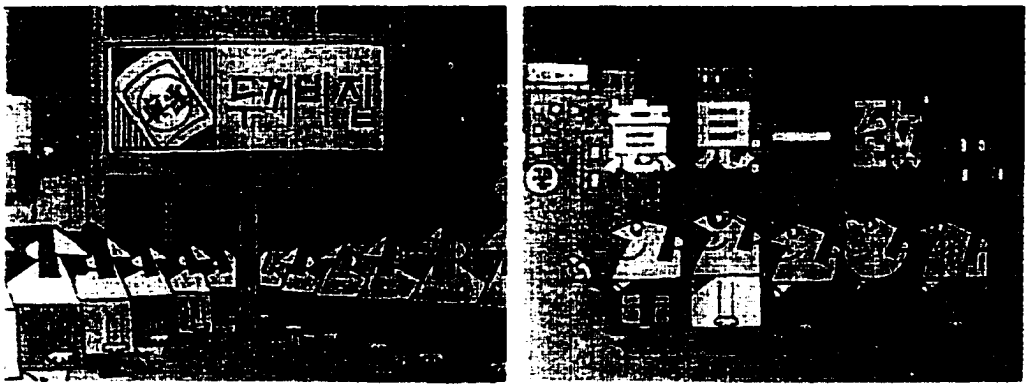


Figure 3-2. Clips of "Jinro Soju" (1960).
(I. Kim, 1995, p. 57)

Donghun Shin, one of the most active animators in Korea, established the Shin Donghun Productions in 1960. After "Jinro Soju," Shin made another successful animated advertisement, "Dakpyo Ganjang" (Chicken Brand soybean sauce) of the Aegyeong Yuji Company. These two commercials exalted Shin in the realm of animation advertising, to the extent that he played a significant role in the production of most works (D. Shin, 1996, p. 90; I. Kim, 1995, p. 56). One reason Shin was sought as an animator of commercials was his musical talent, which allowed him to match

commercial songs with the moving pictures of his animation, an essential, but hard-to-come-by, skill at that time (I. Kim, 1995, p. 57).

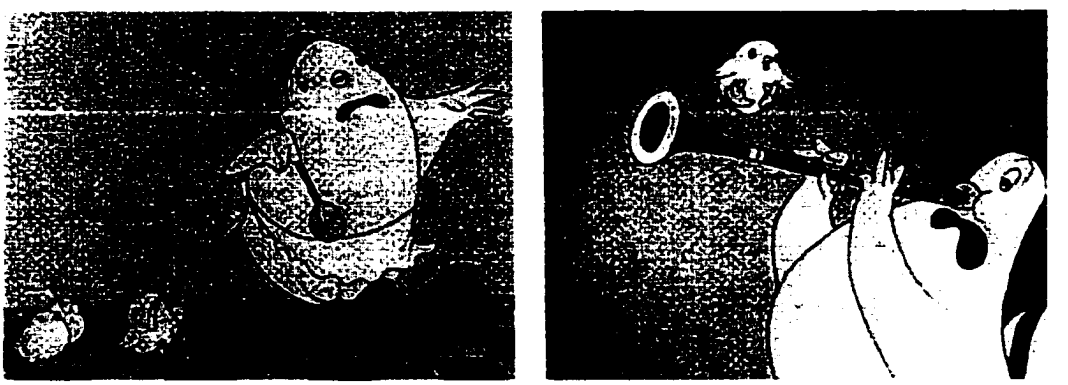


Figure 3-3. Clips of "Dakpyo Ganjang" (1960).
(I. Kim, 1995, p. 56)

Also in 1960, Dosik Eom produced "Whalmyeongsu," the name of a digestive drink. This piece of animation led the drink to dominate almost the entire market (S. Whang, 1992, p. 191). The important animators, such as Donghun Shin, Sangho Yi, Seonghak Han, Neungpa Shin (Nelson Shin), Dobin Jeong, Dosik Eom, and Youngil Park, did pioneer work during this period (N. Shin, 1996a, 1996b; S. Whang, 1992; S. Han, 1995, p. 86), when advertising played an important role in the early development of the Korean economy.

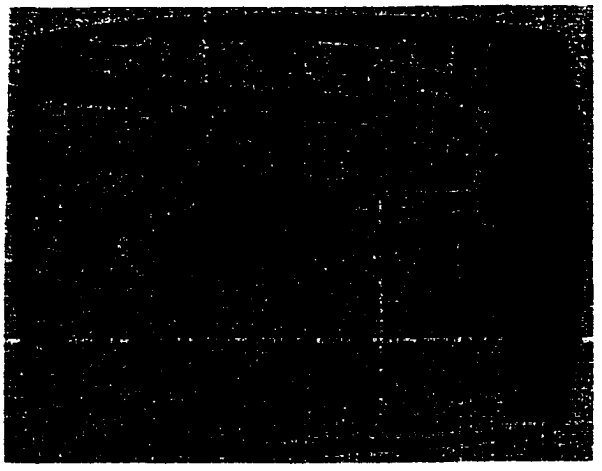


Figure 3-4. "Whalmyeongsu" (1960).
(S. Whang, 1992, p. 191)

Educational and Artistic Animation

In the early days and throughout the history of Korean animation, production of educational and artistic films was relatively weak. According to Vallas (1997), the six-minute educational film, "I Am the Water," by Dobin Jeong and Youngil Park, was the genesis of Korean animation; it was broadcast on the American Forces Korean Network (AFKN) in 1963. In addition, Gungnip Youngwha Jejakso (the National Movie Production Institute) of the Ministry of Culture and Public Affairs sponsored the four-minute animated feature "Juireul Japja" (Let's Terminate Mice) where cartoonist Yongwhan Kim's famous character "Kojubu" was used (N. Shin, 1996b, p. 79).

In terms of artistic animation, the institute also experimented with the five-minute "Gaemiwa Betzangi" (Ants and the Locust), from Aesop's fables. Youngil Park,

Dobin Jeong, and Seonghak Han were the animators of this film (S. Whang, 1992, p. 191), released in April, 1961.

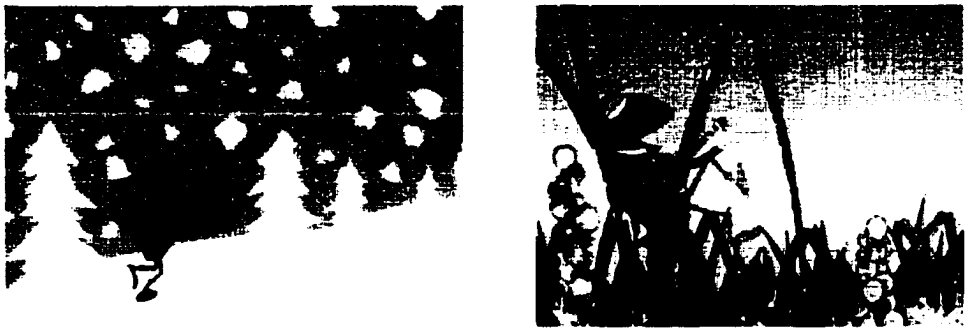
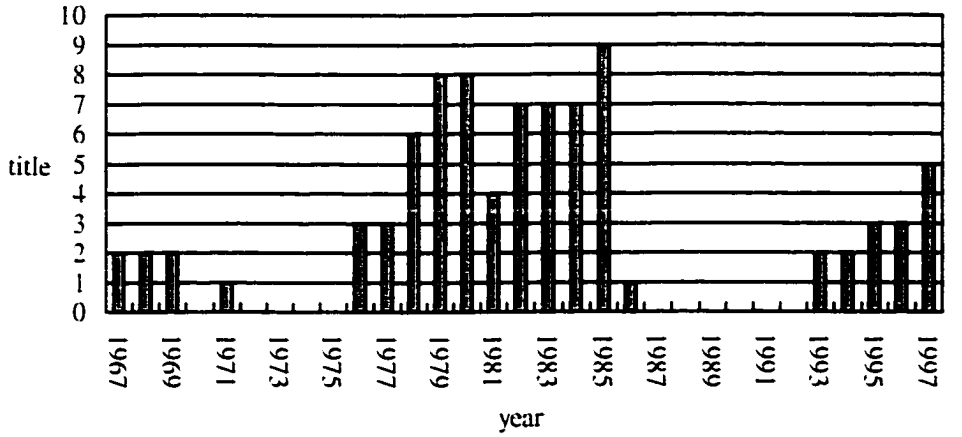


Figure 3-5. Clips of "Gaemiwa Betzangi" (Ants and Locust, 1961). (Jeong, 1996, p. 98)

Development of Korean Animated Features

Overall, Korean domestic animated features appeared sporadically between 1967 and 1997, broken into three important periods: genesis (1967-1971), prosperity (1976-1986), and renaissance (1994-present). There were gaps such as 1970, 1972-1975 and 1987-93 when none was made. The birth of Korean animated features came in the late 1960s, when talented pioneers struggled with unfavorable sponsoring agencies and poor production environments. The prosperity from 1976 to 1986 gave birth to sixty three animated features. In spite of high number of animations produced, however, most animation was the result of an imitation of imported Japanese television robot animation. At that time, Korean animation was regarded only as children's entertainment until the first adult animation was released in 1994.

Graph 3-1. Production of Korean Animated Features



The current boom in animation has led the Korean animation industry to widen its range of audience from children to adults, and to broaden its genres from science fiction to realism animation. Various other themes of animation also emerge, such as environmental protection, ideological conflicts, social problems, nationalism, and so on, which previously were not considered as proper themes for animation.

The peak year was 1985 with nine productions, followed by 1979 and 1980, each with eight, 1982, 1983 and 1984, each with seven, and 1978 with six. Five features were made in both 1982 and 1997, four in 1981, three in each year 1976, 1977, 1985, and 1986. Two features were produced in each year 1967, 1968, 1969, 1993, and 1994, one in both 1971 and 1986 (S. Whang 1992; S. Han 1995; Rho, 1995; Yun, 1995; "Animation Panorama," 1995).

Genesis (1967-1971): Birth of Animated Features and Working Conditions

In the beginning, box office triumphs of imported animated features provided the sound financial basis for the production boom of Korean animation. Segi Sangsa (Segi Company), a major distributor of animated features and live-action movies became a key sponsor of domestic animation production.

Figure 3-6. Hong Gil Dong" (1967). (S. Whang, 1992, p. 192)

Figure 3-7. The Main Characters of "The Return of Hon Gil Dong" (1995). (Y. Park, 1995b, p. 67)

Poster of the first Korean animated feature "Hong Gil Dong," in 1967 (Figure 3-6) and its main characters revived by the original animator, Dongwoo Shin who died in 1994 (Figure 3-7).

Segi Company backed the Shin brothers (Donghun and Dongwoo Shin) when they produced the country's first animated feature "Hong Gil Dong" in 1967[13]. Donghun Shin, still called "the grand master" of Korean animation (D. Shin, 1995, pp. 84-85), was director. Shin soon became known as an "exclusively successful animation director" (I. Kim, 1995, p. 56).

The story of "Hong Gil Dong" was from *Punguna Hong Gil Dong* (The Boy of Wind and Cloud, Hong Gil Dong), which had been drawn since 1965 by Shin's younger brother, Dongwoo Shin, in the children's newspaper, *Sonyeon Chosun Ilbo* (Chosun Daily Newspaper of Youth). Advertising for "Hong Gil Dong" proclaimed that "125,300 pictures were drawn in one year by 400 people. If one person hand made it, he would have taken 400 years to complete them. The production cost is equal to that of ten domestic movies." Furthermore, the advertising boasted, "There are only five countries in the world which can make animated features, America, France, Germany, Japan, and finally Korea." "Hong Gil Dong" attracted 100,000 patrons in just four days. The film's key personnel, Seongwoong Yu, Wook Jeong, and Daejung Kim currently run their own animation companies, Shinwon Productions, Daiwon Dongwha, and Seyoung Dongwha, respectively.

---

[13] There was a report ("Manwhayeongwha 'Wonjo'," 1998) that the very first animated feature may be "Seongwoong Chungmugong" (Holy Hero Admiral Yi) made by the producer Jaepyo Jung for the purpose of education of children in 1958. The pictures were drawn by Yongwhan Kim who was the creator of the famous comic character "Kojubu" in Korea, and its voice actor was Min Gu who was one of the most popular voice actors then. However, it is hard to consider the feature as a form of animation because the feature was not animated. The drawings were taken in the 16 mm film as slide pictures.

Immediately after "Hong Gil Dong," in January 1967, Korea had another animated features, "Hopiwa Chadolbawi" (The Man of Tiger Skin and the Boy of Rock Stone) also directed by the Shin brothers and sponsored by Daedong Movie Production; it was in the theaters in August 1967 (S. Whang, 1992, pp. 191-3).

Figure 3-8.
Poster of "Hopiwa Chadolbawi"(1967). ("Hanguk Animatione," 1997, p. 162; S. Whang, 1992, p. 193)

Figure 3-9.
The Main Characters of "Hopiwa Chadolbawi." ("Shin Dong Hun Gamdok," 1997, p. 167)

"Hong Gil Dong" was awarded first prize in the non-live action movie category during the annual movie competition for the Daejong Prize in 1967. Shin also invented production techniques, one of which was multiple exposure, used to create shadow by controlling the amount of light that a camera accepts. The multiple exposure enabled

him to make shadows without painting. He also experimented with pre-recording and sound synchronization narration, already used in the U.S., but not in Korea (D. Shin, 1995, p. 84; 1997, p. 166; D. Shin, personal communication, August 15, 1995).

The Shin brothers were not involved in producing animated features again until 1995, when they helped make "The Return of Hong Gil Dong." The reason they stayed away had to do with their disappointment with the production companies, Segi Company and Daedong Movie Productions, which did not reward them fairly, despite their box office success. Segi Company reneged on the original contract, reducing the brothers' promised compensation because they did not meet the production deadline for "Hong Gil Dong." Exhausted by legal and other hassles, Dongwoo Shin left the animated feature arena, while Donghun Shin moved to television animation and sub-contracting production for overseas clients (I. Kim, 1995, p. 52).

Donghun Shin did well in television animation, leading him to establish Universal Art, a company that produced Japanese and European subcontracted animation from 1974 to 1980. In the latter year, he had to give up the production studio because of his lack of management skills, at which time he left for Canada, where he briefly worked at Nelvana. He traveled all over the U.S. for three years and had six exhibitions of his drawings. Upon his return to Korea in 1982, he was appointed honorary chairman of Daiwon Animation Company, where he aided in the production of the animated feature "Dokgotak" (1984) until 1986. In 1992 Donghun Shin produced a title role animation of the American movie "Ninja Kid," which was his last work as an animator. After retirement, Donghun Shin became a classical music commentator and

wrote a guidebook for classical music listeners (I. Kim, 1995, pp. 58-59; "Shin Donghun Gamdokgwa," 1997, p. 166; Lent, 1997).

Even when the Shin brothers agreed to re-make the 1995 version of "Hong Gil Dong," their talents were not appreciated: Dongwoo Shin died of a heart attack on November 17, 1994, and Donghun Shin struggled with the Japanese animators on whom the Korean sponsor Stone Flower Company mostly relied. Finally, he quit directing animation because he disagreed with how the story and character drawings were being developed (D. Shin, personal communication, August 15, 1995). Thus, the 1995 version of "Hong Gil Dong Returned" was produced without the original creators.

The loss of the Shin brothers to the industry curtailed domestic production. The industry was more and more inclined to import foreign animation for television and theaters, and to imitate the styles and stories of imported animation. For example, out of twenty features made in Korea in the late 1970s, seventeen were Japanese style robot animation.

The success of "Hong Gil Dong" allowed Segi Company to keep investing in cel animation; at the same time it produced Korea's first puppet movie "Heungbuwa Nolbu" (The Brothers Heungbu and Nolbu) in 1967. Segi even exaggeratedly insisted in its advertising that "Heungbuwa Nolbu" was the world's first puppet movie (S. Whang, 1992, p. 192).

Without the Shin brothers, early animated features were sustained by Youngil Park, Seonghak Han, and Hanyeoung Kang, who ran Altamira Productions (C. Kim,

1997, pp. 108-109), and Yusu Yong. Youngil Park directed "Sonogong" and "Whanggum Cheorin" (Golden Iron Man) in 1968, and "Bomulseom" (Treasure Island) in 1969, with Segi's sponsorhip. In addition, Yusu Yong made "Hong Gil Dong Janggun" (General Hong Gil Dong) in 1969 and "Wangja Hodonggwa Nangnang Gongju" (The Prince Hodong and the Princess Nangnang) in 1971, which were also sponsored by Segi (Y. Choi, 1995, p. 123).

Segi was the only company to continue to produce animated features, bringing out six features in the five years after 1967. The company advertised its animated feature was colorful, more fun, longer in running time, clearer on the bigger screen, and more realistic than television animation (S. Whang, 1992, p. 194).

Segi's role in the early development of domestic animation was immense as the company continued to import foreign cartoons and movies, the profits from which were plowed back into the production of domestic animated features. Most animation studios could not exist long and for some, their first animation was also their last because of high production costs and a limited audience. Animation was commonly regarded as a genre of low culture just used to entertain children during summer and winter vacations (S. Whang, 1992, p. 207).

In regard to working conditions, the industry was in very poor condition in the early days. Wages were low, and production materials and equipment were in short supply. According to Nelson Shin (1996b), although sponsors were enthusiastic about animated advertising, they only paid animators 200,000-300,000 Won per minute of the film, barely enough to cover net production costs and the charge account at a local

Chinese restaurant. Even so, the Korean animators thought positively, working on the belief they were being paid to study animation (p. 79).

Finding a cel supply was the most difficult aspect of production, and early animators salvaged the expired wide film used in air surveillance thrown away by the American Air Forces base in Korea (I. Kim, 1995, p. 49; Lent, 1997). Seonghak Han (1995) reflected that the film had to be unrolled, washed with special chemical detergents to make it transparent and then, cut to half size as an economy measure (p. 86).

Figure 3-10. A Sketch of the Early Days.

Dobin Jeong (1996), also reflecting on those beginnings, said:

> As soon as camera work was done, the painted cels were put into water to be washed out. We cherished each cel like a treasure not to have any scars and damages on them. Then, we hung them on laundry strings to have them dried. We used laundry pins to hold them on the strings. We only could rent a narrow room of an inn where the laundry strings were strung like spider nets, while the paintings and drawings were scattered randomly on the floor. We could not imagine any N.G. (no good) cels at all because

> the paintings on the cels were already washed out after camera work and dried ready for second drawings and paintings on them. In this way, the five-minute-long 35 mm color animation "Gaemiwa Betzangi" (Ants and the Locust) was made in four months (pp. 98-99).

The cels washed out and reused were not as clean as before. Further, when the cels dried, they rolled up and animators had to put them under heavy objects for long periods to unroll them (S. Kim,1996, p. 99). Animators were also handicapped in cel coloring. Not able to obtain proper paints, they used washable water colors, which were not completely adhesive to the cels, allowing colors to separate in the drying process and requiring artists to redraw the images repeatedly (I. Kim, 1995, p. 49). Even then, parts of the paintings were missing when cels were put in the camera (S. Kim, 1996, p. 98-99).

Equipment was not available either. Without line testing machinery which would enable them to see the pictures in motion before actual camera work, animators were forced to rely on good luck (S. Kim, 1996, p. 98). To shoot the animation onto film, they used a live action movie camera they adapted to animation (I. Kim, 1995, p. 49). Wook Jung (personal communication, August 14, 1995) recalled that a movie camera engineer, Wonchun Jeon, created a camera after examining one belonging to the U.S. Eighth Army in Korea. He measured the stand and duplicated it by himself.

The problems seemed almost endless. For starters, there was the weather. The rainy season played havoc with cels, which stuck together and were damaged. Then, there was the lack of training and expertise of the small staff, which necessitated reporting work. Also, improvisation dominated production. The animator Dong Hun

Shin, for example, applied his knowledge of astronomy which was one of his hobbies, to get the double exposure effect. In addition, the shadow effect was improvised through the concept of accumulation of light (Lent, 1997).

Working under these conditions was often tortuous and challenging. For example, Segi's "Sonogong" (1968) was made during the winter in unheated and uninsulated quarters. Animators recalled that they had to blow warm air from their mouths to unfreeze their cold hands and fingers. In the summer, they suffered excessive heat in uncooled rooms directly under the hot roofs (Im, 1996, p. 97).

To meet deadlines, animators often worked without sleep for two to three days. One animator told how he kept falling asleep at the table, so he pretended to go to the toilet, and instead, went to the top of the building, lay down in the snow, covered his face with a newspaper and fell asleep. When he woke up he found a fellow worker asleep beside him, both partially covered by snow (S. Kim, 1996, p. 99).

Small budgets and short production schedules were the most difficult obstacles to overcome. Production of domestic animation coincided with the subcontracting of overseas clients' animation, first with the Japanese in 1966, and the Americans in 1969. In time, Korean animation studios had to put aside domestic animation production in order to serve foreign clients. Overseas subcontracting opportunities grew rapidly in the 1970s, and the industry shifted accordingly. As animator Jeonggyu Im (1996) said, "We always say that if we had enough money and time, we surely can make as good animation as Disney (p. 97)."

Prosperity (1976-1986): Robot Animation

As said earlier, Koreans were first exposed to overseas animation when "Peter Pan" was shown in 1957. Imported television animation after 1964 particularly provided Korea with the production basis for a boom in domestic science fiction animation in the 1970s and early 1980s. Newly-created television stations critically needed foreign animation to fill their children's programs, because the imports were of high quality, less expensive than local productions, and appealed to audiences. Interestingly, the success of the imported television animation triggered a boom in the domestic production of animated features. The Japanese television series, "Mazinga Z," aired on MBC in 1975 became an inspiration for children's animation in Korea. At the end of a four year drought, when domestic animation was not made, the Korean industry followed the model of "Mazinga Z" and began to produce science fiction (robot) cartoons in 1976. As a result, seventeen of the twenty features made in Korea during the 1970s were science fiction animation. But, producing science fiction animation did not get stronger due to the Korean government's negative perspective toward cartoons, which continued into the 1980s.

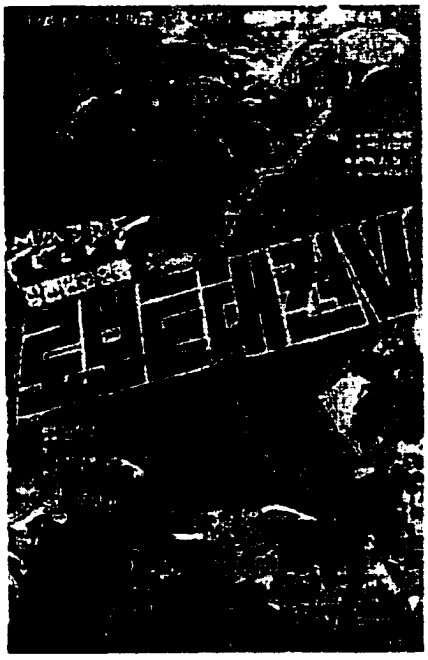


Figure 3-11.
First "Robot Taegwon V" (1976).

Figure 3-12.
Second "Robot Taegwon V" (1976).

Figure 3-13. Third "Robot Taegwon V."

Most imitated Japanese science fiction animation, represented by the super robot "Mazinga Z." The first domestic copy was "Robot Taegwon V" (1976), directed by Cheonggi Kim (Y. Choi, 1995, p. 121; "Hanguk Animation Geungan," 1997, p. 163). So similar to Japanese animation were some features that one director, Seonghak Han decided not to publicly reveal his name on a poster for his "Cheorin 007" (Iron Man 007) (1976), and instead, listed his son's name as director (S. Han, 1995, p. 87).

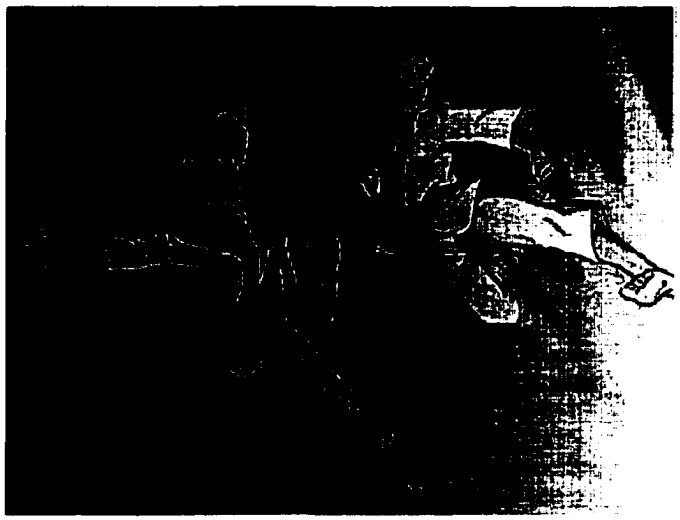


Figure 3-14. "Taegwon Dongja Maruchi Arachi" (1976).
("Jeonwhangi," 1997, p. 39)

The series "Robot Taegwon V" ended in 1977[14], but in the interim, one of MBC's popular radio dramas, "Taegwon Dongja Maruchi Arachi" (Taegwon Kids Maruchi and Arachi) was animated by Samdo Film in 1976. Directed by Jeonggyu Im, the film became the third most popular of the year with 164,143 viewers. Another success at the box office was "Byeolnara Samchongsa" (Three Musketeers in Space), which garnered a theatrical audience of 103,118 in 1979 (Rho, 1995).

Two of the three non-science fiction animated features of the 1970s, "Wangja Hodonggwa Nangnang Gongju" (Prince Hodong and Princess Nangnang, 1971) and "Samgukji" (The History of Three Countries, 1979), were adaptations of Korean and Chinese legends, while the third, "Cheonha Mujeok Ttori Jangun" (Unbeatable General Ttori, 1979), was a nature adventure story. None of these attracted audience as large as robot animation.

Although banned since the Liberation from Japan in 1945, Japanese animation was shown on Korean television. One show, "Candy," aired on the MBC in 1977, was so popular that Ilshin Publishing Company translated and published the comic book series from which it evolved, even though publishing Japanese comic books was prohibited by law. Ironically, the government did not strictly enforce its 1945-

[14] SICAF 95 indicated that the first series of "Robot Taegwon V" appeared in December 1976 ("Animation Panorama," 1995), and S. Whang (1992) agreed with that date. However, the series that Whang indicated as the first is actually the second. Whang and other sources, such as Changwan Han (1995b) and Gwangwoo Rho, (1995) agreed that the final series, "Robot Taegwon V, Commando in the Water,"ended on July 20, 1977. Thus, I have decided to place the first and second series of "Robot Taegwon V" in 1976.

originated policy of banning the import of Japanese cultural products (Y. Choi, 1995, p. 147; D. Shin, 1994).

The importation of television animation in the 1970s played two significant roles in the development of domestic animated features: it broke the vacuum of (1972-1975) when it spurred Korean animators into action, and it drove the industry to focus on robot animation.

Figure 3-15. "Dokgotak, Dasi Chazeun Mound" (1985).
("Hanguk Animationgyereul," 1996, p. 12)

From 1987 until 1993, another void occurred in the production of Korean animated features, as animation shifted to television stations, which produced 11,780 minutes and forty one titles. In particular, the Asian Games in 1986 and the Seoul Olympic Games in 1988 accounted for this change: the thinking was that television animation should be made available to the hordes of tourists coming to Korea.

Renaissance of Animated Features in the 1990s

Korea enjoyed the revival of animated features in the 1990s, triggered by "Blue Seagull" in 1994. Actually, in December 1991, Disney's "The Little Mermaid" awakened the Korean animation industry to the enormous commercial possibilities of animated features ("Hanguk Animation Geungan," 1997, p. 164). "The Little Mermaid" drew 433,309 viewers and was ranked as the fourth most successful movie in early 1992 (Rho, 1995, p. 56).

Two years later in 1993, two local animated features were produced: "Georie Mubeobja" (Outlaw on the Street) by Daiwon Animation Company and "Super Child" by Young Production. Even though these films helped fill the six-year vacuum since 1987, they failed to satisfy the expectations of Koreans, long accustomed to foreign animation. The two domestic films were just regarded as copies of foreign features.

Figure 3-16. Poster of "Blue Seagull"(1994). ("Hanguk Animation Geungan," 1997, p. 164)

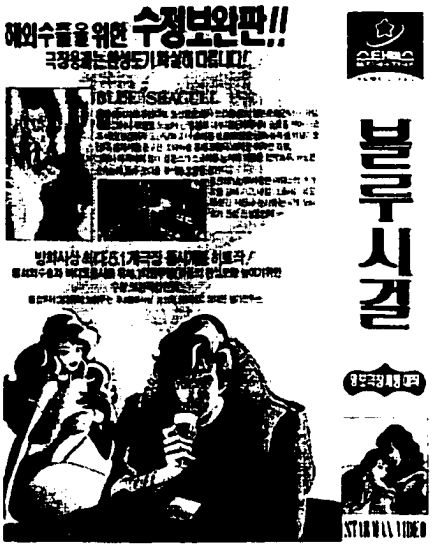


Figure 3-17. Video Cover of "Blue Seagull" (1994).

In 1994, "Blue Seagull," the country's first adult animated feature, was released amid intense criticism for its sexual images and clumsy pictures, which pictures were often poorly colored, roughly drawn, and out of synchronization with sound and movement. Moreover, "Blue Seagull" was known to have been hurried; it was made in just three months (Park & Song, 1996, p. 185). But, "Blue Seagull's" high attendance of 500,000 ("Hanguk Animation Geungan," 1997, p. 164) indicated that Korean people's interest in animation was still alive and that domestic films should be made in addition to those for foreign clients.

In 1995, three full-length features, "The Return of Hong Gil Dong" by Stone Flower Company, "Red Hawk" by Daiwon Animation Company, and "Hungry Best 5" by Young Production were released. In addition, "Armageddon" of Armageddon

Production Committee was planned for a 1995 release, but did not meet its production schedule; it appeared in January 1996.

Figure 3-18. Poster of "The Return of Hong Gil Dong" (1995).

Figure 3-19. The Main Characters of "The Return of Hong Gil Dong." (Park, 1995b, p. 66)

Korean animators put to use the know-how they acquired from long-term subcontracting of overseas animation. However, the serious critiques of "Blue Seagull's" low quality pictures made the industry seek a technical association with Japanese animation production companies, such as "The Return of Hong Gil Dong" in association with Anime International Co., Ltd., "Red Hawk" in association with Toei Animation, and "Hungry Best 5"with the directing staff of "Slam Dunk" in Japan.

"Red Hawk"was first carried in the bi-weekly comic magazine *Sonyeon Jump*. Its story was created by Sangwol Ji, famous for ancient warriors stories ("Hanguk Animation Geungan," 1997, p. 165).

Figure 3-20. Poster of "Red Hawk" (1995). ©Dai Won Animation

Figure 3-21. The Main Characters of "Red Hawk." ©Dai Won Animation

"Hungry Best 5" was first carried in the *Daily Sports Newspaper*. The basketball animation was the second sports animation in ten years since "Dokgotak, Regaining Mound" (1985). Meanwhile, in January 1996, "Armageddon" made an interesting move in the industry. Written and directed by Hyunse Yi, Korea's most popular cartoonist, "Armageddon's" entire production procedure was done in Korea, except for the sound effects, made in America by Bauer and Bracken Studio (Park & Song, 1996, p. 193).

Figure 3-22. "Hungry Best 5" (1995).
("Hanguk Animation Geungan," 1997, p. 166)

What was most interesting was that "Armageddon" was funded not by one producer as was usual but by a consortium of more than ten investors, including the director and the original story writer (Armageddon Production Committee, 1995, p. 11). Thus, its appeal lay not just in domesticity of production know-how but also in its use of consortium funding. Further, because its original story was already very successful in the comic book market, people expected box office success, even though the storytelling was poor.

Figure 3-23. The Main Characters of "Armageddon" (1996).
(Park, 1995a, p. 64; "Urinara Jangpyeon," 1996, p. 77)

"Armageddon" lasted just two weeks in the theaters, with only 100, 000 viewers. One reason for its failure was that Disney's "Toy Story" was in the theaters at the same time. ("Hanguk Animation Geungan," 1997, p. 166). Also, the makers of "Armageddon" did not pay attention to the format difference between comic books and animation. In fact, "Armageddon" was ten book-long stories, and it was difficult to put them into a two hour animated feature. Hyeonse Yi, originator and director, confessed "I did not know that the particular mechanism for animation is different from that for comics, and my excessive enthusiasm with unskillful directing brought about the failure for which I am totally responsible ("Hanguk Animation Geungan," 1997, p. 168).

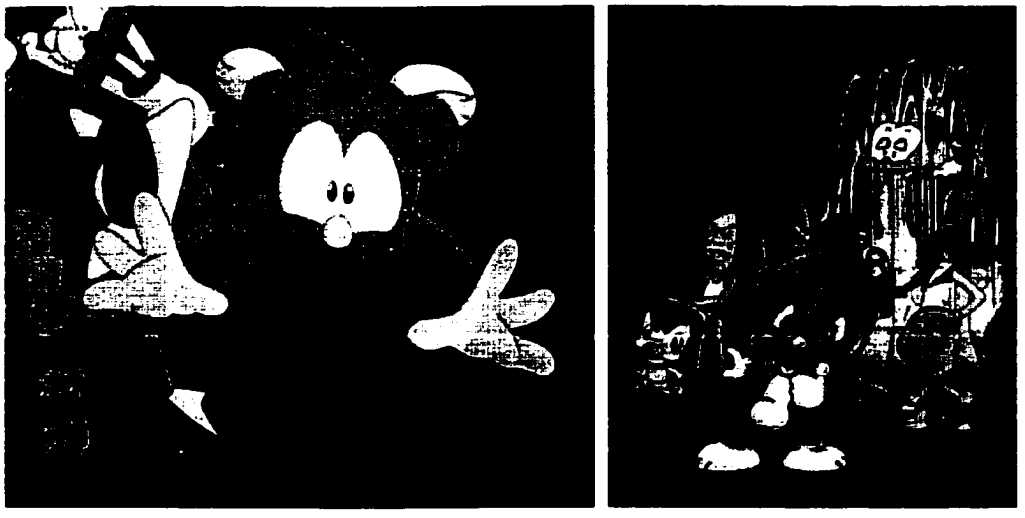


Figure 3-24. The Main Characters of "Little Dinosaurs Dooly" (1996).
(© Dooly Nara; "Agi Gongryong Dooly," 1996, p. 86; "Cover Story," 1996, p. 4)

After this disappointing situation, the success of an animation feature gave hope to the industry. It was "Agi Gongryong Dooli--Eoreum Byeol Moheom" (The Little Dinosaurs Dooly—Adventure on Ice Planet) shown in 1996. "Dooly," so called, attracted 250,000 patrons in a month. Like "Armageddon," it was also directed by its original creator, Sujeong Kim, and its story had been successfully carried in a comic magazine for twelve years. On top of that, KBS made it into an animated television show in 1987 ("Agi Gongryong Dooly," 1996, p. 86).

"Dooly's" success alerted the industry to two important points: television animation was important as a first trial for comic book stories in the market and an attractive storyboard was the key to success in attracting people's attention ("Hanguk Animation Geungan," 1997, p. 169). Unlike "Armageddon," "Dooly" had been tested

in television or video animation markets previously: it was very popular in the comic book market.

Also in July 1996, "Wanghu Esdeo" (Queen Esther) was shown in theaters. Directed by Cheonggi Kim and produced by Dongbo Heunhaeng, in association with Stone Bell Animation, its Old Testament story did not attract large audiences.

Figure 3-25. Poster of "Wanghu Esdeo"(1996).

Figure 3-26. The Main Characters of "Wanghu Esdwo." ("AWN," 1996c, p. 53).

On July 19, 1997, three animated features were shown in theaters on the same day: the science fiction adventure "Jeonsa Ryan" (The Last Warrior Ryan), directed by by Hyeongin Park of Pilgrim Art Movie, "Nanjung Ilgi" (War Diary), by Gangmun Byeon of HanGil Productions, and "Euijeok Imggeokjeog" (Imggeokjeog the Righteous Gang), by Cheonggi Kim of Stone Bell in association with the Seoul Broadcasting System (SBS).

"Euijeok Imggeokjeong" was sponsored by Seoul Broadcasting Station (SBS), the first time a broadcasting company sponsored domestic theatrical animation. Broadcasting companies traditionally were timid in producing animation, as they preferred to import less expensive overseas animation.

Figure 3-27. Poster of "Euijeok Imggeokjeog" (1997).

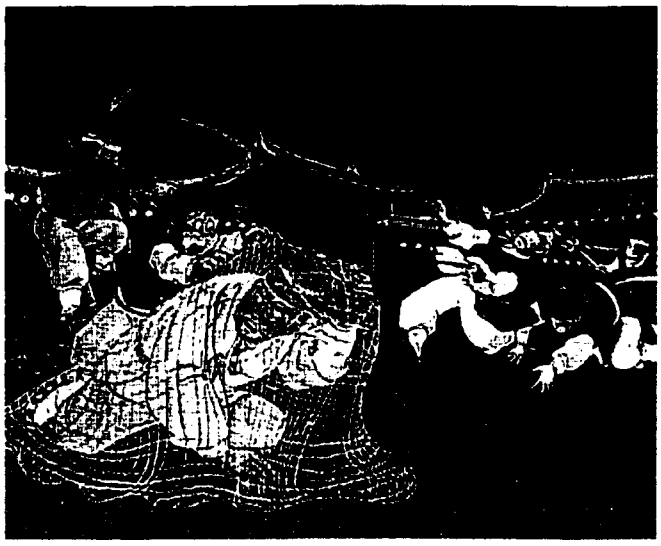


Figure 3-28. A Clip of "Euijeok Imggeokjeog." ("'97 Chunchon.", 1997, p. 47)

"Nanjung Ilgi" (War Diary) was the first work of HanGil Productions which alone funded it with 820 million Won ($1.025 million) ("AWN," 1997b, p. 9). The War Diary was written by Admiral Shunshin Yi of the Yi Dynasty during the war against Japanese invasion. The Admiral was a national hero who defeated the Japanese navy and the story was animated in 1997.

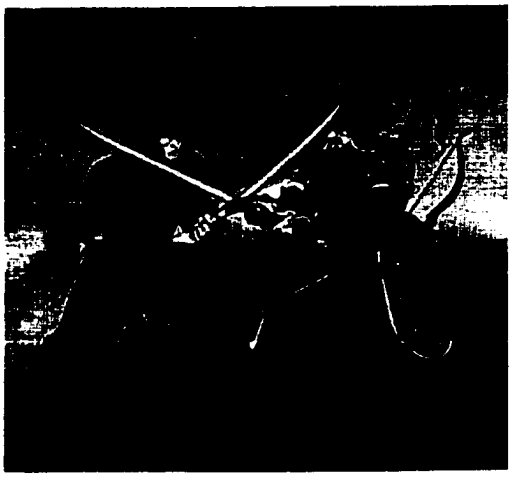


Figure 3-29. "Nanjung Ilgi (War Diary)" (1997).
("AWN, 1997b, p. 9)

Unlike "Nanjung Ilgi" which was funded solely by its production company, "Jeonsa Ryan" used a consortium approach: its major sponsor was Ssangyong Group, one of Korea's business Jaebeols (conglomerates), its producer, Cine Dream, and its production studio, Pilgrim Art Movie. Usually a producer takes on the whole financial backing solely. However, Cine Dream as a matchmaker connected its financial sponsor and actual production studio. That was important in that the Korean animation industry began to have a professional producer system which would create a bridge between sponsors and animators.

Figure 3-30. The Main Characters of "Jeonsa Ryan" (The Last Warrior) (1997). ("AWN," 1997b, p. 9)

In such a co-production system including three major players, the producer could economically and effectively mediate between sponsors and studios, and coordinate spin-off businesses, such as publishing, character merchandising, game software, and advertising. This co-production system enabled sponsors to invest without professional knowledge of animation, and the industry could attract even small funds from multiple co-sponsors so that it could reduce the high financial risk of animation production. ("Motion Special," 1997, p. 112).

Actually, Cine Dream gave the fancy company[15] Morning Glory the right to character merchandising, and Woongjin and Jigyeong publishing companies, the rights to publish a film book of the animated features and comic books of the same title.

[15] In Korea, fancy products implies ornamental, elaborate, imaginative and cute products usually for the specific consumers, such as children and young women. This business concept is applied to almost every consumer product, such as stationary, sports goods, gifts, clothing, shoes, underwear, etc. Cartoon characters are one of their major materials to apply to the products.

respectively. In addition, Ssangyong Information and Communication Company made a fantasy role-playing game for the IBM personal computer.

The three animated features of 1997 reached only 40,000 to 50,000 viewers, except for "Jeonsa Ryan (The Last Warrior)," which had 100,000 viewers, thanks to the Jaebeol's promotional efforts ("Animation Yeongwhasijang," 1997, p.26). Compared with previous animated features, such as "Blue Seagull," "The Return of Hong Gil Dong," and "Armageddon," which drew 100,000 to 500,000 viewers, revenues of the 1997 features were very disappointing, far below their profit-loss break-even point of 60,000 viewers ("Animation Yeongwhasijang," 1997, p.26).

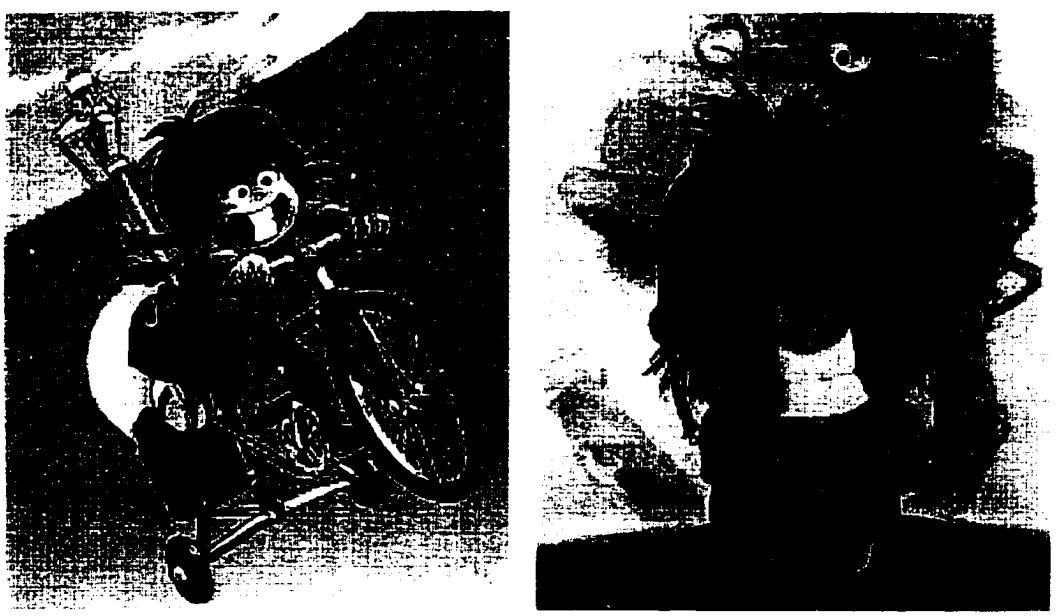


Figure 3-31. Clips of "Mangchi" (Little Hammer).
("AWN," 1997a, p. 8)

As a result, two features, "Mangchi" (Little Hammer) by JCOM Production and "Odoltogi" by Jaedong Park, planned for release in late 1997 were shelved, as

investors, especially industrial conglomerates, were reluctant to support the industry. Production of "Mangchi" stopped after providing a demo tape because its production company JCOM was abruptly closed. JCOM was established by Samsung group's Jeil Jedang Compay in October 1995, and "Mangchi" was to be its first animated feature, to be produced in cooperation with Korean-American animator Peter Chung who was making Aeon Flux of M-TV("Hanguk Animation-e Gungan," 1997, p. 170; .Park, 1998).

Jaedong Park, producer and director of "Odoltogi," experimented in seeking funds, encouraging audiences to participate in the production by purchasing cel drawings and movie tickets in advance. The theme of his work was much different from previous features, showing the ideological conflict between communism and capitalism in Korea's Cheju island after Japanese colonization in 1945 and before the Korean War in 1950. In spite of his impressive efforts, "Odoltogi" did not generate enough funding.

Figure 3-32. The Main Characters of "Odoltogi." © Odoltogi
("Hanguk Animation Geungan," 1997, p. 172)

Suffering from financial shortages, producers looked for sound patrons, usually a consortium composed of multiple investors, or a Jaebeol's backing. This was a time for testing new genres and themes of animation. "Blue Seagull," for example, introduced adult animation to Korea in 1994, and despite criticisms, it succeeded like no other animated feature at the box office. In terms of theme, "Odoltogi" was the most interesting experimentation; not only did it depict the suffering and pain caused by ideological conflicts between leftists and rightists, but its director insisted that the animation should be funded by lay people. "Odoltogi" seemed to test the statement made in *Animatoon Magazine*: "Korean animation industry is only commercially led by non-professionals who were indifferent to the foundation of creative production" ("AWN," 1997a, p. 22).

The Rise of Television Animation

The Korean animation industry had a great boost from the outside when the country hosted the Asian Games in 1986 and the Olympics two years later. Television stations, as major consumers of animation, realized at the time that they had always depended upon imported animation and had no domestic cartoons to show to the great number of foreign visitors expected. In addition, the animation industry regarded these sporting events as a great chance to attract additional subcontracting business from abroad. Thus, many animation companies were established to meet these demands, including AKOM in 1985, Saerom in 1986, and Dongseo Dongwha and Mihan in the late 1980s. Television stations also became much more active in producing animation. In 1987, KBS sponsored the country's first television animation, "Tteodoro Kkachi" (Wandering Kkachi), which shifted the industry from theater to television production. From 1987 to 1993, there were forty one animated television shows of 6,455 minutes.

The same year as "Tteodori Kkachi," a show of eighty minutes, MBC released its first animation, "Dalryeora Hodori" (Run, Hodori: 100 episodes of five minutes each). Other firsts came in quick succession: the first television animation series, KBS' "Dongwha Nara ABC" (ABC in Story Land, six episodes of twenty minutes each) in 1987; the first pre-recorded animation, "Agi Gongryong Dooli" (Baby Dinosaur Dooli, thirteen episodes of twenty minutes each) by KBS in 1987; the first drama format animation, KBS' "Dalryeora Hanny" (Run, Hanny) in 1988; the first show that merchandized its characters, KBS' "Cheonbang Jichuk Hanny" (Mischievious Hanny) in 1989; and "2020nyeon Ujueui Wonder Kid" (Wonder Kiddy in Space in 2020), also

by KBS in 1989, a first effort by an animation production company and a television station to co-produce and co-distribute a product. Later, co-production became KBS' principal way of animation production (S. Whang, 1992, p. 205).

Figure 3-33. "Tteodori Kkachi" of KBS (1987).

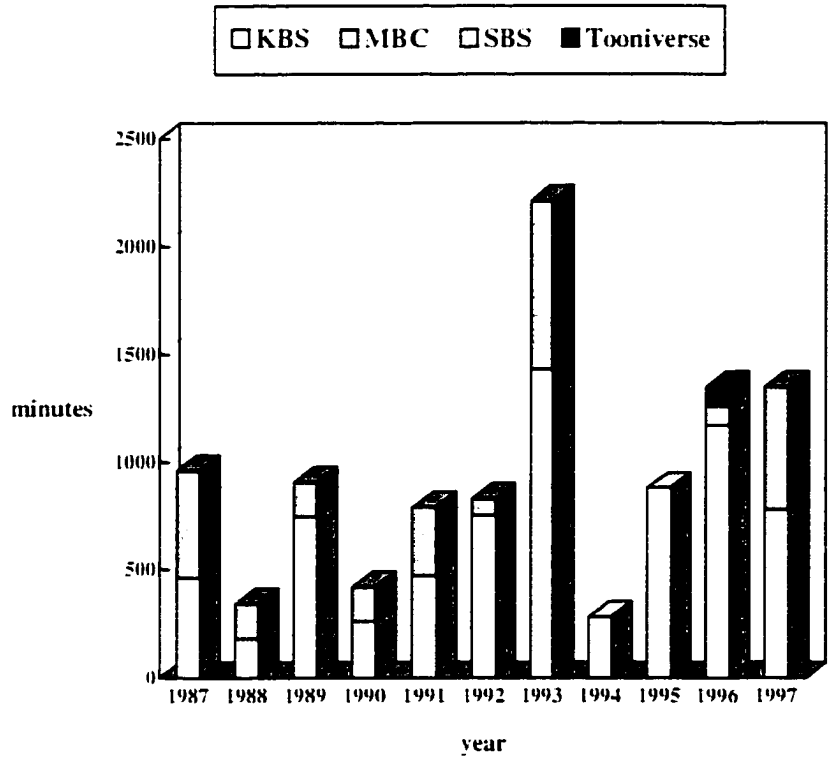
Since "Tteodori Kkachi" in 1987, KBS led production of television animation in Korea, creating 1,385 minutes from 1987 to 1989, with an average of 461 minutes per year. Meanwhile, its counterpart MBC produced 802 minutes, averaging 273 minutes yearly during the same period.

Table 3-1. Television Stations' Animation Production (unit: minute)

	KBS	MBC	SBS	Tooniverse	Total
1987	460	500			960
1988	180	160			340
1989	745	160			905
1980s total	**1385 (62.81%)**	**820 (37.19%)**			**2205 (100%)**
1980s avg	**461**	**273.3**			
1990	260	160	Established		420
1991	470	320			790
1992	750	80			830
1993	1430	780			2210
1994	280				280
1995	880			Established	880
1996	1170		90	90	1350
1997	780	570			1350
1990s total	**6020 (74.23%)**	**1910 (23.55%)**	**90 (1.11%)**	**90 (1.11%)**	**8110 (100%)**
1990s avg	**752.5**	**238.75**	**11.25**	**11.25**	**1070**
Total (87-97)	**7405**	**2730**	**90**	**90**	**10315**
Avrg (87-97)	**673.18**	**248.18**	**11.25**	**11.25**	**937.72**

Entering the 1990s, KBS increased its animation schedule: from 1990 through 1997, it produced 6,020 minutes (a yearly average of 752.5 minutes), accounting for 74.23 percent of the nation's total. MBC took the second rank in animation production, with 23.55 percent of the total, producing 1,910 minutes (an average of

239 minutes per year). Comparing the 1980s and 1990s in terms of yearly average, KBS increased its production by 291, while MBC reduced its by thirty eight minutes.



Graph 3-2.Television Stations' Animation Production.

As seen in Graph 3-2, KBS played a leading role in producing its own animation, while MBC and other stations were seriously inclined to co-production. MBC produced 3,055 minutes by way of co-production, while KBS made only 2,550 minutes jointly in 1990s.

Among its productions, KBS made its first science fiction animation, "Eunkkabi-e Yennal Yetzeoge" (Eunkkabi: Once Upon a Time; a series of thirteen shows of twenty minutes each), in 1990 in association with Hanho, Shinwon, Dongyang, and Take One

studios (S. Whang, 1992, pp. 206-207). The animation was popular enough to be made into a second part in 1992.

To stimulate the profession and to enhance its own reservoir of stories, KBS annually has provided a competition of animation scenarios. The best scenario of the first competition, "Haetsal Namu" (Sunny Tree: a series of four shows of twenty minutes each), was animated. In 1992, KBS' "Jiguneun Chorok Byeol" (The Earth is a Green Planet) of the best scenario of the 1991 competition was awarded a bronze medal in the New York Movie Festival. Stimulating the industry was the first result from the competition (Min, 1994, p. 36).

Figure 3-34.
"Jiguneun Chorok Byeol" (1992).
("Urinar Animatione," 1995, p. 36)

Figure 3-35.
"Koby Koby" (1992).
("Jeonwhangi," 19997, p. 37)

Figure 3-36.
"Hamos" (1997).

Another successful animation work to come out of the scenario competition was "KobyKoby (Little Monster: five shows of twenty minutes each)" made in 1995 from the 1992 winner. "Koby Koby," Korea's first television animation broadcast with

stereo sound, was awarded the special prize in the long animation section of Daehanminguk Youngsang Manwha Daesang (the Korean Visual Cartoons Grand Prize Contest) in 1995, and was later exported to the US and Canada. Part two of "Koby Koby" was made in 1996 when "Duchiwa Ppukgu" (Duchi and Ppukgu: of a series of twenty six shows of thirty minutes each) was produced ("Jeonwhangi," 1997).

In 1997, KBS made a ceremonial animation work, "Noksaekjeoncha Hamos" (Hamos the Green Chariot: a series of twenty six shows of thirty minutes each) in celebration of the ten-year anniversary of domestic television animation and its own fifty year history of broadcasting. KBS invested 2.6 billion Won in this animation in partnership with Geumgang Giwhoek company and Daiwon Animation company. Each of the two companies undertook twenty five percent of the total production cost of the animation. The station announced that the animation would be totally made with Korean skills. "Noksaekjeoncha Hamos" was also broadcast in Japan at the same time ("Jeonwhangi," 1997).

MBC opened its production with the two-part series "Meoteol Dosa" (Magic Boy Mutul: a series of two shows of eighty minutes each) in 1990. Different from KBS, MBC produced eighty-minute works until 1993, except for "Dalryeora Hodori" (Run, Hodori), a series of 100 five-minute shows in 1987. In 1991, MBC produced as many as four different eighty-minute shows ("Heukggokdu Jangun" (General Heukggokdu), "Yojeong Pink" (Fairy Pink), "Jangdokdae," and "Simcheong"), investing 788 million Won ($985,000) in total (or an average of 197 million Won ($246,250) each). Another

eighty-minute animation. "Ggulbeore Chingu" (Honeybee's Friends), was made in 1992, with the highest MBC investment so far, of 236 million Won ($295,000) ("Jeonwhangi," 1997).

Figure 3-37. "Meoteol Dosa" (1990).

Figure 3-38. "Penking Liking" (1990).

("Jeonwhangi," 1997, p. 40) ©MBC Productions Co.

Moving from one piece eighty minute animation, MBC tried its first noteworthy animation series, "Penking Liking" (a series of twenty six shows of thirty minutes each), in 1993. With an investment of 1.56 billion Won ($1.95 million). The station quit making its own animation after "Penking Liking" as a series was unfavorably compared with one of MBC's dramas that was successful and less expensive than the animation ("Jeonwhangi," 1997, p. 36). For three years until 1996, MBC did not make its own animation, instead concentrating on co-production and importation of overseas animation. Production was resumed in 1997 with the two series: "Guiyeoun Tzogomi"

(Little Cutie: a series of thirteen shows of thirty minutes each) and "Kongtakkong Iyagi Jumeoni" (Kongtakkong Story Pocket: a series of twelve shows of fifteen minutes).

Two other stations entered animation production. SBS made its first animation in 1996, a ninety minute show, "Naeireun World Cup" (World Cup Tomorrow) with a 410 million Won ($512,500) investment. Tooniverse, started in 1995, made "Mulk and Swank's Music Show" in two versions: one of fifty minutes with English subtitling and one of forty minutes with Korean subtitling.

In terms of co-production, KBS and MBC were very interested in cooperating with overseas as well as domestic, animation producers. KBS' first co-production was with Korean production companies in 1990, the results being "Youngsimi" (a thirteen show series of thirty minutes each) and "Narara Super Board" (a two show series of thirty minutes each) in cooperation with Daiwon and Hanho Heungeop Company. The next year, KBS produced 1,950 minutes of a show "Widget" with the American ZODIAC, its first foreign partner, while MBC made two titles of a total 1,625 minutes with Saban Entertainment. In the same year, KBS produced 470 minutes of its own domestic animation and MBC did 320 minutes (C. Han, 1995, p. 187).

Table 3-2. KBS' Domestic and International Co-production (1990-1995)

Year	Title	Co-producer	Input (Won/dollar)	Length (minutes)
1990	Youngsimi	Daiwon		390 (30 minutes x 13)
	Narara Super Board	Hanho Heungeop	1.634 billion ($2.04 million)	60 (30 minutes x 2)
1991	Widget	ZODIAC	16.5 billion ($20.625 million)	1950 (30 minutes x 65)
1995	Mugungieui Miraeyeohaeng	KTA sponsored all expenses.	134.25 million ($167,812)	75
	Gongjajeon	NHK, PTS	1.120 ($1.4)	90
Total			19.388 billion ($24.24 million)	2.565

Later in 1995, KBS broadened its range of overseas production partners when producing "Gongjajeon" (Tales of Confucius: a ninety-minute show) with Japanese NHK and Taiwanese PTS. KBS invested 1.12 billion Won in the project. "*Gongjajeon*" received special attention from the industry because KBS participated not only in its financial support but also in the beginning stage of creating and planning the animation. KBS broke the usual way of co-production which was just financial investment in animation ("Changrip," 1996, p. 33).

Figure 3-39. "Gongjajeon" with NHK and PTS.
("Changrip, 1996, p. 33)

Table 3-3. MBC's International Co-production

Year	Title	Co-producer	Input (Won)	Length (minutes)
1991	Gulliver's Travels	Saban Entertainment		650 (25 minutes x 26)
	Maekrowa Sonyeon	Saban Entertainment		975 (25 minutes x 9)
1992	Teolbo Ajeoshiwa Kkureogi	Saban Entertainment		650 (25 minutes x 6)
	Mr. Bogus	ZODIAC		650 (25 minutes x 6)
1994	Ggumdori	ZODIAC	3.4 billion (4.25 million)	780 (30 minutes x 26)
Total				3,705

Totally, KBS produced 2,565 minutes by means of co-production with domestic and foreign companies, while making 6,020 minutes itself. That KBS' co-production did not exceed what it made itself can be explained by the fact that it was expected to contribute to the development of domestic animation. Co-production helped stations to have a chance to share some important rights to producing animation at a reasonable price because the station did not have to full financial responsibility. The undesirable factor was that its actual production was not necessarily contracted with domestic animation companies. On the contrary, even though the costs are enormous, when a station produces its own animation, it helps the industry by contracting with domestic companies.

MBC, as a private station, strongly concentrated on co-production. It produced 3,055 minutes by way of co-production in the 1990s, which was 62.5 percent more than its own animation production of 1,910 minutes. It participated in producing two titles of a long series: "Gulliver's Travels" and "Maekrowa Sonyeon" (Macro and a Boy) by Saban Entertainment. By joining with ZODIAC, MBC produced "Mr. Bogus" in 1992 and "Ggumdori" (Twinkle the Dream Being) in 1994. For three years, 1994-1996, it engaged in nothing but co-produced animation. The co-production strategy also became strong for the private television stations established in the 1990s.

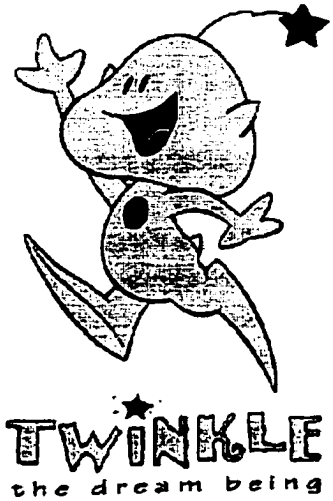


Figure 3-40. "Ggumdori" (Twinkle the Dream Being,1994). ("Jeomnwhangi," 1997, p. 38) © MBC Productions Co.

SBS and the animation cable station Tooniverse were established in 1990 and 1995, respectively. Initially, SBS was timid in animation production and started its first animation "Bitdori-e Uju Imalli" as a co-production with Saban Entertainment in 1993. In 1996, SBS made a ninety-minute show of its own, but did not go further in animation production.

Table 3-4. SBS' Co-production

Year	Title	Co-producer	Input (Won)	Length (minutes)
1993	Bitdori-e Uju Imalli	Saban Entertainment	7.8 billion ($9.75 million)	650 (25 minutes x 26)
Total				650

Table 3-5. Tooniverse's Co-production

Year	Title	Co-producer	Input (Won)	Length (minutes)
1997	Lazenca	Koko Entertainment, Daegyo Publishing Co.	2.15 billion ($2.69 million)	390 (30 minutes x 13)
	Jang Bogo	S-MEDICOM (Korea), Zen Entertainment (USA), Image KEI (Japan)		72
1998	Chrono Quest	S-MEDICOM	5 billion ($6.25 million))	780 (30 minutes x 26)
Total				1,242

On the other hand, Tooniverse was more enthusiastic in producing animation, both with overseas and domestic partners in 1997. It produced "Younghon Gibyeong Lazenca" (Lazenca the Soul Warrior) and "Haesangwang Jang Bogo" (Jang Bogo, the King of the Sea).Tooniverse invested 2.15 billion Won for "Lazenca" with other domestic investors, such as Koko Entertainment and the Daegyo Publishing Company; its "Jang Bogo" was made with three outside partners, S-MEDICOM of Korea, Zen Entertainment of U.S.A., and Image KEI of Japan. This was the greatest number of multi-national partners for animation production.

Figure 3-41. "Lazenca" (1997). ("Hanguk Animation Geungan, 1997, p. 177)

Figure 3-42. "Jang Bogo, King of the Sea" (1997). © S-MEDICOM

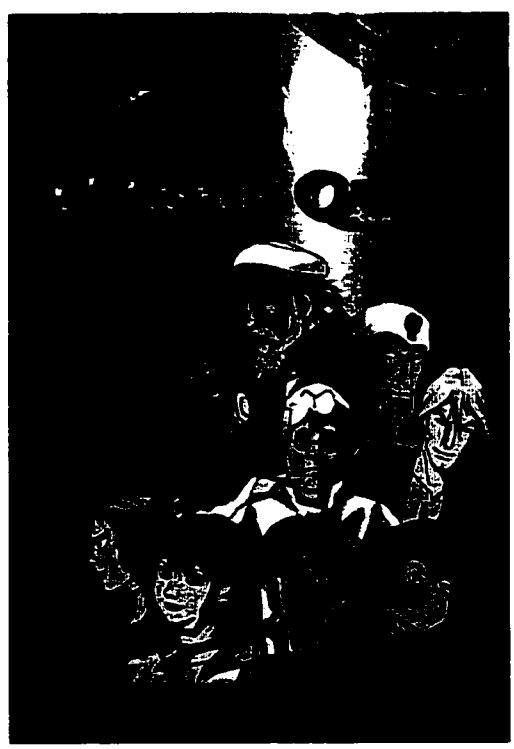


Figure 3-43. "Chrono Quest" (1998). © S-MEDICOM

History of Subcontracting Overseas Animation

The animation production studios in Korea have developed a system that relies upon a strong cottage industry for many phases of production. Almost everyone freelances or moonlights, and many studios lay off workers like a bookie lays off bets when he gets more action than he can handle. A studio may be producing three separate series at the same time and not even have a layout department in house. However, the bottom line is that over the thirty years of subcontracting history, Korea has developed a large and capable work force and a system in which their production efforts can be maximized when needed and downsized when slow (Vallas, 1997).

Korea's subcontracting of overseas animation is a result of the unstable and expensive labor market of client countries. The strikes by American animation workers in the 1940s helped spur the industry to look for alternative labor souces, especially in Asia where skillful, stable, and inexpensive workers were abundantly available.

Pioneers of Subcontracting Japanese Animaiton: Wook Jung and Dai Won Animaiton Company

While the production of domestic cartoons has not grown steadily, that of overseas animation by subcontracting has prospered since its beginning in 1966, when Tongyang Broadcasting Company (TBC) became the subcontractor of the Japanese animation show, "Golden Bat" (Jung, 1994, p. 5; Vallas, 1997). TBC, which no longer exists, was credited with performing assistant animation on Japanese animation. However, TBC closed its animation department three years later and concentrated on

importing overseas animation. Its first foreign animation was "Yogwoe Ingan" (J. Yi, 1995, p. 95; Y. Choi, 1995, p. 123).

The real rush to subcontract for Japanese animation studios began in 1973 and involved production companies such as Universal Art (represented by Dongheon Shin and Byeonggwon Jeong), Golden Bell, Donggi Dongwha (Donggi Animation), Seyoung Dongwha, and Yunseong Sireop (Yunseong Company). Seongwoong Yu, working for KBS, established Gyoyuk Dongwha (Education Animation Company) and started subcontracting for Japanese Toei and American DIC Enterprise in 1976, taking charge of key animation through camera work. "Dennis the Menace," "Ghost Busters," "Captain Future," and "Transformers" were its memorable works. Goyuk changed its name to Shinwon Production later in 1986 (S. Whang, 1992, p. 208).

Dai Won Dongwha (Dai Won Animation) was established in 1977, and has had a long-term deal with Toei, but also produces the works of American Marvel and Ruby & Spears. Wook Jung, president of Daiwon, earlier participated in producing "Hong Gil Dong" (1967) and "Hopiwa Chadolbawi" (1967) with Dongheon Shin. After his military duty, Junng established Won Productions, together with Daejung Kim from Seyeoung, on October 5, 1973. (Wook Jung, personal communication, August 14, 1995). On December 6, 1974, Won Production changed its name to Daiwon Productions, which was changed again into Dai Won Animation Co., Ltd (Jung, 1995).

Dai Won began its subcontracting history with the Japanese Toei Animation in 1977, and set up a technical tie-up with Toei Animation Company and Toei CM

Company in 1978. It produced "Candy Candy" for Toei. "Star Zingga," "A Thousand Year Queen," "Knights at the Round Table," "King Arthur," and "Little Ladies" were early subcontracted Japanese animation. In 1985, Dai Won also began to produce Marvel's "GI Joe" and "Transformer," and Ruby & Spear's "Rambo," DIC Enterprise's "The Little Archies," "Dennis, the Menace," and "Hello Kitty." Hanna Barbera, MWS Inc. and Project X are its major overseas clients (Dai Won, 1995).

Dai Won Animation was awarded $10,000,000 Exports Stature from the government with a Letter of Commendation by the president and the prime minister in 1986 and again in 1992. Also, "The Earth is Green Planet" (five episodes of twenty minutes) received a bronze medal from the New York Film Festival in 1992.

With Seyeong, and Gyoyuk, Dai Won specialized in subcontracting Japanese animation, but some American animation indirectly subcontracted through Japan. American clients spent more than the Japanese or Korean television stations, such as KBS and MBC who were their domestic clients. Thus, the Korean studios tried to subcontract American animation (N. Shin, 1996b, p. 80). Daiwon's first domestic television animation was made for KBS and MBC in 1987, and its first domestic feature animation, "Red Hawk," was released in 1995.

Dai Won Animation has grown to include the following affiliated companies: Dai Won Movie Company (1988), Dai Won Home Video Company (1989), Dai Won Toy Company (1992), and Dai Won Publishing Company Ltd. (established in 1992) which publishes comic books and monthly and bi-weekly comic magazines. Interestingly,

Dai Won had previously set up a publishing division in the animation production company and launched a bi-weekly comic magazine in 1991.

Pioneers of Subcontracting American Animation: Nelson Shin, Steven Hahn, Tayk Kim and Jerry Smith

Nelson Shin is also notable for stimulating Korea as a world-class animation producer by connecting the country to the American animation production system. Nelson Shin, whose Korean name is Neungpa Shin, started his career as a cartoonist in his early 20s. He was involved in the production of the advertising commercial "Jinro Soju" with Dongheon Shin after he established Shin Neungpa Animation Studio in 1960. Nelson Shin left for America in 1971, and eight years later, brought six storyboards from the United States[16] and successfully produced the animation with several local studios.

Political instability, however, due to the assassination of President Chunghee Park in 1979 raised questions about the Korean industry's stability in overseas subcontracting. Moreover, America went through animation worker strikes. One of the main issues was that the studios should not send their work overseas. Nelson Shin had to come back to America and worked at Marvel, participating in "GI Joe" and "Transformer." Later, in 1985, Shin came back to Korea and established AKOM

[16] According to Vallas (1997), Nelson Shin started out by making a deal with Depatie-Freling to bring six half-hour shows they were producing with the Netherlands to Korea. The show was titled "Dr. Snuggle." He also brought a Bugs Bunny Special for Depatie-Freling From America to Korea.

Production Company in Seoul, mainly to subcontract the animation of Marvel Productions (N. Shin, 1996a, p. 70; 1996b, pp. 79-80).

Its first work was an animated feature film "My Little Pony: the Movie" from December 1985 to March 1986. Its representative television works were: "My Little Pony and friends," "The Transformers," "Muppet Babies," "Pink Panther," "The Simpsons," "Peter Pan," "Bat Man," "X-Men," "Conan," "The Tick," "GI Joe," "Arthur," "Casper," and others (N. Shin, 1994).

AKOM was awarded a memorial cup in 1993 by the government for exporting $10 million. AKOM reported a production run of 189 shows for 1996 (Vallas, 1997, p. 5). AKOM also is making "Invasion America" (thirty-minute series of thirteen shows) which is the first animation of DreamWorks SKG's established in 1994 ("AWN," 1997b, p. 9).

Nelson Shin was selected as one of the most influential people in international animation by Animation Magazine in the USA ("The most influential," 1998, p. 20). Nelson Shin believes he brought the first full show (animation through camera) to Korea. Others felt Steve Hahn or the late Jerry Smith was first. They were all pioneers and helped to started the industry (Vallas, 1997).

AKOM's current major clients are Universal Studios, Warner Brothers, Film Roman, Saban Entertainment, Sunbow Entertainment, Dream Woks Animation in America, and CINAR and Funbag Animation in Canada, and Gaumont Entertainment in France; AKOM Production Company, has 875 employees in 1999. They include twenty directors, 150 key animators, and 400 assistant animators (N. Shin, 1999).

In 1968[17], International Art Production began re-doing a series of single reel shows featuring classic animation characters such as "Betty Boop," "Krazy Kat," "Felix and Porky the Pig." These old theatrical shorts were being copied frame by frame and being reproduced in color. This company was run by Jeong Yoon Song and Tayk Kim (Vallas, 1997).

In 1973[18], Tayk Kim joined Korean American Steve Hahn[19] and opened Dongseo Dongwha (East West Animation). Dongseo Dongwha started overseas subcontracting by joining with Ralph Bakshi and supplying in-between animation on the features "War Wizards" and "Hey Good Looking" (Vallas, 1997). Dongseo Dongwha's major clients were the American DIC Enterprise, Ruby & Spears, Canadian Nelvana, and French IDDH. Its works included "Chipmunks," "Silver Hawks," "Ghost Buster," "Care Bears" and so on (Whang, 1990, p. 208).

Dongseo became Hanho Heungeop in 1984, which became a major player in the formative years of Korean animation (Vallas, 1997). Hanho was nominated as a promising exporting firm by the Korea Foreign Trade Association, and awarded the Canadian GEMINI trophy in 1990. Later in 1992, Hanho was also awarded a $10

---

[17] According to Whang (1990, p. 207) subcontracting for Hollywood studios was initiated in 1969 by International Art Production which started out doing the coloring works for U.S. animators.

[18] According to Whang (1990, pp. 207-208), Dongseo Animation was established in 1974, when the studio did just inking and painting for Ralph Bakshi's animation.

[19] Tayk Kim (personal communication, August 17, 1995) explained that he made two minute demonstration film of "Felix the Cat" in 1973. Kim did not have personal relationship with Steve Hahn who studied films in America, but Hahn came to Kim to propose co-working. Later, they produced some portions of key animation and assistant animation of "War Wizard," "The Lord of Wings," and " Fire and Ice."

million exports memorial cup by the President of Korea and a Letter of Commendation by the Korean Government (Hanho Heung Up, 1995). It had more than 500 employees, forty percent of whom worked as inkers, painters, camera men, etc. (Kim, 1995, personal interview). Hanho Heungup's current major clients are Nelvana (Canada), Walt Disney and Warner Brothers, and France Animation. Hanho now employs 526 workers for actual production in 1999. Specifically, it presently has eighteen directors, ten layout artists, ninety nine key animators and 192 assistant animators. Hanho Heungup made 137 shows under fifteen titles which were less than twenty five minutes each. They include two shows of feature length animation in the first half of 1998. It produced 106 shows with twenty two minutes animation and one feature animation of 70 minutes in 1996, and 123 shows of twenty two minutes and eleven minutes with a seventy minutes animated feature in 1997 (Kim, 1999).

In the formative years, Steve Hahn played an important role in adopting American animation production skills to the Korean industry. Hahn Heungup opened another company, Mihan in 1980. Hahn lost both Mihan and Hanho Heungup when he produced the world's first theatrical 3-D animation, "Star Chaser: The Legend of Orion" in 1984, a failure that resulted in his financial backers taking over his studios. Hahn left Korea to return to the United States (Yi, 1994; Vallas, 1997). Hahn's style was more direct and confrontational than that of other studios in the Asian region, such as those in Taiwan or Japan, where saving face and avoidance of open conflict was a more natural way of dealing with problems (Vallas, 1997).

Steve Hahn received work from Ruby & Spears on their show "Plastic Man." This work came to him with the help of Jerry Smith, who was trusted by Ruby and Ken Spear. Smith had been sent to Taiwan by Bill Hanna in 1978 to help James Wang set up Cookoo's Nest, but in what would become a recurring theme, he had a falling out and so was ready to try a new start up in 1980 with Steve Hahn in Korea (Vallas, 1997).

But by 1985, Jerry Smith had split with Steve Hahn, formed his own company, Take One which he shortly closed after he left the country. Tayk Kim also had left Dongseo and started his own company called Pion Animation. He is now president of Luk Film and is making the feature animation "Squishees" (eighty minutes) of American Felix Company ("AWN," 1997c, p. 14). Another Korean American, Nelson Shin, was opening a new studio, AKOM, which would eventually become the largest studio in Korea (Vallas, 1997).

Sunwoo Entertainment

Korea had another animation production company in 1974 that stemmed from television commercial production. Sunwoo Productions was established by workers in Korea's first independent advertising agency, Seonjin Munwha. Sunwoo means friends of Seonjin. Sunwoo Production was a leader in making advertising commercials and also took an active part in the field of animation production. Sunwoo Production subcontracted four Japanese feature length animation films between 1977 and 1985, and also produced four domestic features during that time. In

1989, Sunwoo Animation was established and subcontracted Walt Disney's animation, such as "Chip & Dale," "Talespin," "Darkwing Duck," "Goof Troop, Bonkers," and "New Bonkers." Film Roman's "Cro" and Games Animation's "Rocko's Modern Life" were its work, too. Its average production capacity is six episodes a month with over 300 workers.

Also, in 1991, Anivision Korea was established for the animation of Twenty Century Fox's "The Simpsons," Paramount's "Duck Man," and Nickelodeon's "Rug Rats," among others. Anivision Korea is now able to produce six episodes a month with more than 250 employees. Furthermore, Sunwoo reached out to America for its international business by establishing Anivision America in Los Angeles in 1992. Sunwoo also extended its business to the area of animation production planning, animation copyright and character licensing in the Sunwoo Giwhoek (Sunwoo Planning) started in 1991. All of the companies are now combined under Sunwoo Entertainment with about 600 employees.

Han-Young Kang, chairman of Sunwoo Entertainment had worked in Segi Company which produced "Hong Gil Dong" and "Hopiwa Chadolbawi." Sunwoo was rewarded with a $1 million in exports memorial cup in 1990 and $5 million in exports memorial cup in 1991.

Production Company Groups Based on Sub-subcontracting

Myeongok Jeon of Ko Ko Enterprises came into prominence as her company's subcontracting reached $20,800,000 in 1997. Ko Ko has produced animation for

Warner Brothers, Walt Disney, Tri Star, etc. since 1994. "Batman," "Spider-Man," "Super Man," and "101 Dalmatians" were representative works for American clients. The domestic feature animation "Agi Gongryong Dooly," (1996) was also made by Ko Ko Enterprise.

Ko Ko Enterprise has been traced back to Dongyang Animation, established for subcontracting Japanese animation in 1982, when Jeon was twenty six years old. Later, her major subcontracting clients changed from the Japanese to the Americans. Ko Ko grew to be able to produce seventy percent of Warner Brothers' television and feature animation productions in cooperation with its sub-companies, such as Seoul Movies, Samwon, and Dongyang, which are under the management of Jeon's family members. These family group production companies enabled Ko Ko to produce 140 episodes a year on average ("Jeon Myeongok Sajang," 1997; "Muyeoge Nal," 1997; Changrok Jeon, August 14, 1995, personal communication)

The Other Notable Production Companies

Wooyoung Jeong, the president of Youngwoo Production, is proud of his company's various international clients in the US, Japan, and France. He thinks his company has mastered each country's production skills and is ready to produce creative domestic animation. Youngwoo Production was established in 1986 and its exporting reached $800,000 in 1995 ("Hanguksik," 1996).

In addition, Saerom Productions was also established in 1986 and subcontracted Taiwanese Wang Film's animation in the beginning. From 1989, its major clients were

the American Hanna Barbera, DIC, Walt Disney, Universal, and others. It had nine animation directors and 380 employees and exported animation in the amount of $7,000,000 in the first half of 1995.

Saerom hired fifty non-skilled workers and trained them in 1991, while the other companies usually hired skilled workers on the basis of personal acquaintance. Saerom enthusiastically tried to train intensively and use the people for future needs. The result, however, was negative because most of the trained workers left for other companies for better pay or even left the industry ("Haewoe Gondong," 1995).

Rough Draft Korea (RDK) was established in 1992 to subcontract the animation of Film Roman, Walt Disney, and MTV. Its yearly average production was sixty episodes. It exported US $4,600,000 and had 230 employees in 1994. RDK started by doing an odd little show called "Ren and Stimpy" and soon were being sought after as a highly creative studio capable of producing the off-the-wall productions that Klasky-Csupo and Nickelodeon were developing as their benchmarks (Vallas, 1997).

Hahn Shin Corporation was established in 1992. What is interesting is that thirty percent of Hahn Shin's capital funds of one billion Won ($1.25 million) as of 1998 is comprised of overseas capital. It is producing 120 episodes of thirty minutes each a year and has a total of 510 employees including its domestic and foreign branches; it has 290 workers in the main studio in Seoul, ninety workers in the Anitown studio in Chunchon, and 130 workers in the studio in Hochimin City in Vietnam, especially for inking and painting. Specifically, Hahn Shin has fifteen workers in pre-production, 480 workers in animation (twelve for lay-out, eighty for key animation and direction,

110 for inbetweening, eight for checking, ten for background, eighteen for scanning, 163 for inking and painting, seventy three for computer painting, and six for camera shooting) (P. Choi, 1999). In particular, the domestic branch studio in the Anitown began to work in 1997, where Hahn Shin could get financial support for purchasing the equipment of digital computer animation ("AWN," 1997d).

There were a few studios which existed for only a short time. Pioneer and Infinitive Production produced "Smuff," Lee Films made "Jonny Quest," Jo Eun Art worked for "Hooper," Uri Dongwha for "Centurion," Samyeong Animation for "My Little Pony," Geukdong Animation for "Potato Head," and Fine Art Productions for "Cops"(S. Whang, 1992, p. 209). One of the pioneer companies, Universal Art and Yunseong Sireop, also closed its doors, in 1977 (Jung, 1995).

According to the Korean Cable Television Association, the number of people serving the industry was 20,000 and the companies which were registered as export/import companies were 32 as of December 1994 (Korean Cable Television Association's report on the current situation of independent production and its development plan, as cited in Yun, 1995, p. 30). However, the Korean Animation Producers Association (1995) reported that there were 64 member companies in August 1995. If we include small size production studios which served only some parts in the production process, the number of companies would reach 450 in Korea (Yun, 1995, p. 30).

The North Korean Animation Industry

Since 1953, after the Korean War, North and South Korea developed their own industries in their own ways. In terms of animation production, however, the two parts of Korea have a common basis of subcontracting overseas animation.

In fact, the North Korean animation production started with creating its own animation "Heunggyeo-un Deulpan" (Joyful Field) in 1956 and ("Usangwha," 1996), which is more than 10 years earlier than South Korea's first animated feature "Hong Gil Dong" in 1967 and even the first advertising commercial "Lucky Tooth Paste" in 1958.

North Korea's state-owned animation production studio, Korean Scientific and Educational Film Studio (SEK Studio) was established in 1953, and there are 10 more studios presently. About 4,500 people are involved in production. There are reportedly 850 directors and key animators. Jun Ok Kim and Gwang Seon Kim are the most outstanding directors in the North. The studios created "Prince Hodong and Princess Raknang," "The Clever Raccoon Dog," "A Butterfly and a Cock," "The boy General," and "The Story of Two Generals." They are also subcontracting European and Japanese clients, producing 120 shows of half hour animation a year on average[20] ("Bukhan Woegukgwa," 1997; N. Shin, 1997).

In addition, the North Korean animation production skills are about to be added to the South Korean industry. The animation production agent B-29 Enterprise in Seoul

[20] Vallas (1997) reported that North Korean studios are producing 26 half-hours a year at a competitive price for European producers (p.7).

is likely to farm out its animation to the North and import North Korea's created animation ("AWN," 1998b, p. 41).

Contemporary Professionalization of the Korean Animation Industry

Festivals and Events

The industry was become professionalized also through festivals, the establishment of organizations and publishing magazines and books. What is most interesting in the contemporary professionalization is that the festivals and events started with the production boom of Korean domestic feature animation in 1994, when the first feature animation was released after the production vacuum between 1987 and 1994.

Since 1994 the Korean animation industry has made important moves to create and appeal to a domestic market; the industry has tried to advance itself through numerous festivals, forums, symposiums, award competitions, and expositions. The government, local city governments, broadcasting and newspaper companies, independent production groups, and even colleges sponsored, organized, or cooperated in the festivals and events.

Unprofessional Beginning in 1994

A small but important domestic animation film festival was held by the visual study group Maru and the Sogukjang Oneul (Small Theatre Today) in Seoul from November 19 through December 4, 1994. The title of the festival was "The World of

Animation: Animation Path Finding" and was supported by the Dai Won Animation Company , the Sunwoo Entertainment Company, and AKA an animation study group. As shown in its title, the festival tried to find the right path for the development of the domestic animation industry by inviting important speakers in the industry, by presenting papers and by showing foreign animation productions awarded prizes in the international festivals, and old notable Korean animation. It also reminded the public of the industry's subcontracting for foreign clients and introduced and explained the domestic animation due to be released.

The festival was a reflection of the people's strong attraction towards animation triggered by the first adult animation "Blue Seagull" in 1994. Two days after the festival ended, on December 6, 1994, the Ministry of Culture and Sports organized a Symposium for the Development of the Animation Industry, which reviewed the current situation and prospects of the Korean animation industry. It also discussed problems of broadcasting animation, adoption of advanced technology in animation, and needed government policy, all of which were still urgent topics to be addressed.

People's Strong Interests in Animation in1995

The first Seoul International Cartoon and Animation Festival (SICAF) was held from August 11-16, 1995, as Korea's first such international festival. It was organized by the Ministry of Culture and Sports and the public Korea Broadcasting System (KBS) under the management of the SICAF 95 Promotion Committee and the Korean Animation Producers Association. Previously, the government organized the

committee with cartoonists, presidents of animation production companies, college professors, as well as cable and air broadcasting companies. The festival was also supported by major daily newspapers, cartoonist organizations, colleges, a foundation, and governmental ministries.[21]

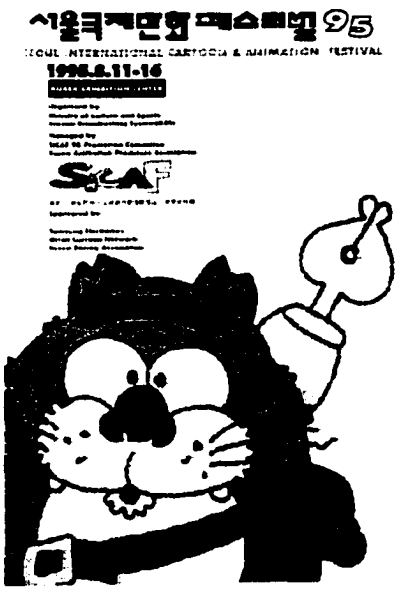


Figure 3-44.
Poster of SICAF 95

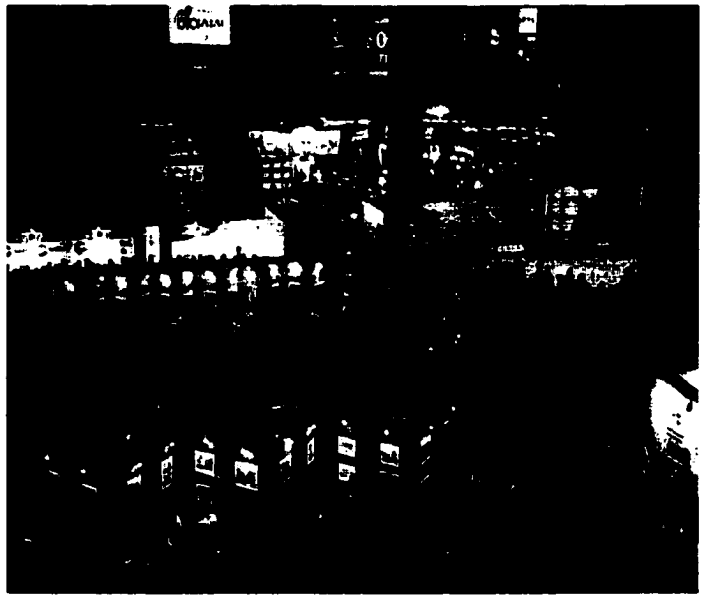


Figure 3-45. A View of the Festival.
("Seoul International," 1995, p. 24)
50,000 people visited SICAF 95 for 6 days (SICAF 95, 1995)

[21] The Committee was composed of the following newspaper companies, *Dong-A, Seoul, Hankyoreh, The Korea Economic Daily, and Sonyeon Hanguk* which is a young children's daily newspaper. The Ministry of Information and Communication, the Ministry of Trade Industry and Energy, the Korea Cartoonist Association, the Korean Publishers Association, the Korean Culture and Arts Foundation, the Korea National Tourism Corporation, the Korea Institute of Computer Graphics, the Kongju National Junior College, and the Duksung Women's University, the Association for Promoting of Korean Cartoon.

SICAF 95 drew 150,000 people in six days, and provided cartoon characters and animation competitions. SICAF awards each year more than fifty million Won (US $62,500): 16.5 million Won ($20,625) for the competition of cartoon characters, and thirty five million Won (US $43,750) for the animation works competition each year. In case of animation competition, ten million Won (US $12,500) was awarded as a grand prize ("Je2whoe '96 Seoul," 1996, p. 21; "SICAF 96 Animation," 1996, p. 22; "SICAF Minganjudo," 1997, p. 35; "'95 Seoul Gukje," 1995).

Different from previous years, SICAF '97 did not have direct governmental involvement. Instead of the Ministry of Culture and Sports, the Seoul Broadcasting System (SBS) became one of its organizers in 1997. SICAF has been a festival of comic arts and animation, necessitating the need for the Seoul Animation Expo in 1997, which concentrates on animation only.

After the first SICAF in August, there was a rush of animation-related events at the end of the year. The social organization Christian Academy held a forum about opening the domestic cultural market to the world and setting cartoon policy on November 10. The forum proposed to establish a council for the development of the Korean cartoon industry. In addition, from November 21-24, the Ministry of Culture and Sports held an exposition called Uri Munwha Sangpumjeon (Our Cultural Products Exposition) in Seoul with the slogan of "the Globalization of Korean Cultural Products."

Within the span of several days, a number of events occurred. In December of 1995, the Korean Cultural Comics and Animation Award was sponsored by the

Ministry of Culture and Sports, adding animation and game software to printed comics, which had been a part of the award ceremonies since 1991 ("AWN," 1997a, p. 11). "Hong Gil Dong Returned" was awarded the grand prize in the animation section in 1995. On December 16, KBS held '95 Jonghap Yeongsang Chukjeon mit Yeongsang Gongmojeon (Comprehensive Exposition of Visual Products and Competition) for six days, which invited domestic and foreign producers and distributors of movies, dramas, and animation, as well as software and hardware companies of visual products. Among 11 zones in the exposition was the Animation Visual Zone. Also from December 16 to 19, the '95 World Amusement Attraction Exposition was held in Seoul, featuring animation spin-off products ("AWN," 1996a, p. 40).

The Rise of Academic Interests in Animation in 1996

The year 1996 was opened with the establishment of the Korean Comics Society in June, which organized its first academic symposium, "The Government's Cartoon Policy, and Its Diagnosis and Response," on December 20. The society was the first cartoon academic society in Korea and its members were composed of professors and independent researchers. The growing number of educational organizations with animation components stimulated the birth of the Society.

The second SICAF was again held in Seoul with the budget of 1.5 billion Won (US $1.25 million) from August 14 through 21 concentrating on industrial synergic

relationships, the creation of domestic animation production, and the industry's advancement towards international markets ("Je2whoe," 1996, p. 20).

Right after the festival, September 13-21, the Pusan International Film Festival (PIFF) was held, and showed several Japanese previously prohibited animation works. The attendance of 200,000 people attested to the public's growing interest in visual products.

On October 16 to 20, the International Cartoon Institute of the Kongju National Junior College organized the Taejeon International Cartoon Visual Exposition in Taejoen city. Cartoon people from over 50 countries participated in the exposition and award competition ("AWN," 1996d, p. 55). Another local city, Chunchon also presented its first annual autumn cartoon festival in order to prepare for Anitown which was planned to be established by 2002. In November 9-15, a cut-out animation titled "Why are You Crying—the Dream of Ikaros," directed by Giyeong Kim, was awarded the Excellent Work Prize in the third Seoul Short Films Festival ("AWN," 1997a, p. 14).

December had two important events for the industry, the Korean Cultural Comics and Animation Award and the Media and Film Expo '96. "Baby Dinosaur Dooli" was awarded the grand prize at the award ceremony. Also, the Media and Film Expo was held by *Joongang Ilbo* (Joongang daily newspaper) and Korea Exposition (KOEX) Company. The exposition included visual products and equipment, such as movies, videos, broadcasting programs, game software, laser disc, animation, virtual reality software, HDTV, karaoke equipment, studio equipment, and so on.

Explosion of Animation Festivals in 1997

The animation boom in Korea beginning in 1995 reached its highest level in 1997. The industry enjoyed six similar festivals and expositions, which was the largest number of international events. There were duplications and overlaps of festivals with unnecessary competitions that wasted time and money.

As a spin-off industry, the game industry was trying to get involved with the boom of Korean animation. For instance, the Korean Game Industry Association held an exposition show Edugame Worldcup '97 on February 22. The exposition intended to combine multi media, entertainment, and education, and provided booths for topics such as education, information and communication, animation, children, animation game, and virtual reality products. Another spin-off business of animation was involved a year later, which was the first Seoul International Character Expo in May 1998. The Korean PC Telecommunication Co. Ltd. and *Chosun Ilbo* (Chosun daily newspaper) organized and sponsored the exposition in association with the city of Seoul and cable channel Tooniverse. The Expo aimed to connect the growing character industry to domestic- and overseas- related markets of fancy products, animated game software, and internet business.

Meanwhile, *Joongang Ilbo* and Tooniverse jointly organized and held an industrial symposium of "The Strategy of Korean Animation for the Future" with the associated sponsorship of the Ministry of Public Affairs on April 28. This symposium was the

second industrial symposium since that on "The Development of the Animation Industry," which was organized by the Ministry of Culture and Sports on December 6, 1994. Different from the first symposium, the second expanded its interests towards the overseas animation industry with invited speakers from France and Japan.[22] Also, the Korean speakers from a production company, a broadcasting company, and a college presented their ideas about the current state of the Korean animation industry. What was interesting is that the actual producers of animation criticized the speakers for their unfair reports of the pre- and post-production capabilities of the industry. The speakers said that the industry is still not ready to go solo in pre- and post-production. But, production company personnel argued that the industry's pre- and post-production capabilities were sufficient to produce internationally competitive animation, and that the only problem was the industry's financial capability to produce feature length animation. The weak financial capability resulted from the fact that the television stations do not concentrate on creating domestic animation, but importing overseas animation ("AWN," 1997b, p. 15).

From July 25 to August 3, two festivals were held in Seoul and Chunchon city. The Seoul Animation Expo '97 was held as the Korea's first animation-only festival by the broadcasting station MBC with the support of the Ministry of Information and Communication, Ministry of Public Affairs, and cultural and social organizations such

---

[22] Mr. Kurosu Masao, the president of Nippon Animation presented about the factors of international competing power of Japanese animation and Mr. Christian Davin, the president of Alphanim in France spoke about the global competing strategies of French animation.

as People's Sports Foundation, UNICEF, and others. Also, the second Chunchon city's Anitown Festival was held with an academic symposium, comics and animation market for trade, job fair, animation presentation, and a cartoon flea market for fans ("Event haengsa," 1997, p.162).

Figure 3-46. Poster of Seoul Animation Expo

Figure 3-47. Poster of Anitown Festival

The theme of Seoul Animation Expo '97 was "Nature and Dreams," primarily focusing on children and young people. Because the festival was exclusively for animation it was regarded to be more helpful for the industry to concentrate on its domestic and overseas markets in a real sense. For example, the Expo promoted its festival in the Ottawa International Animation Festival. It also provided an animation product sample fair, production equipment exhibitions, and invited foreign animators

("Event Haengsa," 1997, p.163). The festival awarded US $120,000 to each of the winners of eight categories: theme animation, educational animation, excellent new director, advertising animation, feature animation, television animation, children animation, and a general section ("Seoul Segye," 1997, p. 39).

At the same time, from July 26 to August 1, the Seoul International Family Film Festival[23] was held in Seoul under the sponsorship of the International Movie Organization, Korea Women's Organizations Coalition, and *Digital Chosun Daily*. The festival was strongly supported by European countries, and the Swedish animator Erling Ericsson was on hand to teach young children animation in a workshop ("Gajokgwa," 1997, p. 51).

From August 8 to 14, the third SICAF '97 was also held with a 1.7 billion Won (US $2.125 million) expense budget. Two weeks after SICAF '97, from August 29 to September 5, Puchon International Fantastic Film Festival (PiFan) was held by Seoul's satellite city of Puchon, with a 1.5 billion (US $1.875 million) budget. Over 80 pieces of animation from 25 countries were shown ("Gajokgwa," 1997, p. 52). September 27 to October 5, there was another international festival similar to SICAF. It was the Dong-A L.G International Festival of Comics and Animation (DIFECA 97). *Dong-A Ilbo* (Dong-A daily newspaper) and the Lucky Goldstar business group organized and sponsored the international cartoon festival. It provided an award competition for 100 million Won (US $125,000) in total, which was the highest award in 1997. Interestingly, another newspaper company *Joongang Ilbo* sponsored the

second Media and Film Expo to exhibit visual products and equipment from December 8 to 11.

Figure 3-48. Poster of Dong-A L.G
International Festival of Comics and Animation.
("Jelwhoe Dong-A. LG," 1997, p. 48)

Along with animation-related festivals, printed comics international festivals and exhibitions were also held. The 8th annual Seoul International Cartoon[24] Festival was held by Korea Comics Culture Research Institute (KOCORI) of Korean Cartoonist Association from June 3-October 17. In addition, September 24-30, the Asia Comics Conference was held in Seoul. The first conference was held under the name of East

[23] Its another title was Seoul International Film Festival for Children and Young People ("AWN," 1997a, p. 13).
[24] In the title, cartoon must be replaced with comics. Cartoon is usually identified with printed comics in Korea. However, cartoon includes comics and animation.

Asia Comics Summit in Japan in 1996. Ten cartoonists including Korea's Hyunse Lee examined the current status of the Asian cartoon industry and discussed ways to boost mutual cooperation in the region.

Table 3-6. International Festivals in 1997

Festivals	**Date**	**Cost**
Seoul Anim Expo	7/25 – 8/3	1.6 billion Won
Chunchon Anitown Festival	7/25 – 8/3	1.56 billion Won
Seoul International Family Film Festival	7/26 – 8/1	0.3 billion Won
SICAF	8/8 – 8/14	1.2 billion Won
PiFan	8/29 – 9/5	1.5 billion Won
DIFECA	9/27 – 10/5	0.8 billion Won
Total		6.96 billion Won (US $8.7 million)

The festivals, expositions, exhibitions, and conferences since 1994 reflected the boom of animation in Korea. The industry enjoyed a rapidly growing number of events every year; in 1997 alone, there were six international festivals and events concerning animation. In the Meeting for the Development of Korean Comics and Animation on December 1, the industry leaders found that the events cost 6.96 billion Won (US $8.7 million) and were concentrated in July to September, averaging about two per month. The meeting concluded there were unnecessary competitions and that money and energy were being wasted (J. Yi, 1997, p. 69). As a result, DIFECA was

moved from September to May in 1998, and the Seoul Animation Expo and SICAF were scheduled biannually in August and October, respectively ("AWN," 1998c, p. 50).

In addition, there has been negative opinion about overseas animation being shown in the international festivals, which leads the public to be inclined to foreign works, rather than domestic animation. In other words, the festivals became vehicles for the exportation of animation in the future. From the industry's practical viewpoint, the festivals did not establish a foundation for development. The industry may primarily need money not to spend on festivals but to support actual production in the industry ("42nyeon Yeoksa," 1997, pp. 62-63).

Organizations for Animation

The Korean animation industry is also backed by the producers' and workers' organizations emerging from the industry boom. The industrial leaders, animators, and camera workers organized their associations in order to cope with rapid changes in the industry.

The Korean Animation Producers Association was formed on December 21, 1994. Sixty seven production companies initially joined the association. The association played important roles in future animation festivals and expositions. In particular, the association announced its overall plan, which would collectively support the industry financially and technically.According to the plan, the producers could create collective power in the market through cooperative promotion both in domestic and overseas

markets, technology transferring, information sharing, and the association's special support of weak member companies. In particular, the association would provide credit assurance, permitting companies to make easy bank loans ("AWN," 1996c, pp. 50-51).

In 1995, a new Korean Animation Artists Asoociation was organized; the ceremonial event was held in Seoul on April 13. The association was created after being petitioned by over 500 people who actually work in animation production. The association actively researched and developed new ideas to introduce and promote their work internationally. The organization, composed of animation directors, camera technicians, key animators, assistant animators, coloring workers, and other workers ("AWN," 1996a, p. 40), would provide animators the proper and needed education to prepare and to keep up with currently advancing animation technologies ("AWN," 1996d, pp. 27-28). In addition, about 300 animation camera workers launched their own association in 1995 (Park, 1995, p. 102).

On April 13, 1996, Korea was approved as a member of ASIFA (L'Association International du Film d'Animation; the International Animated Film Society) on April 13, 1996. The first president of ASIFA–Korea was Nelson Shin, CEO of AKOM. The long pursued and awaited national membership would introduce Korea internationally and further expose Korean artists and animators to the world's animation market. The ASIFA has now over 2,000 members from about 58 countries around the world ("AWN," 1996b, p. 68; "AWN, "1996d, p. 27).

SICAF attempted accreditation by ASIFA in 1996, but failed because the festival was not solely for animation and did not meet ASIFA's requirements ("Seoul international," 1997, p. 93). The Hiroshima International Animation Festival in Japan was already authorized and ran at nearly the same time ("AWN," 1996c, p. 52). ASIFA-Korea had its first general assembly meeting on May 22, 1997. President Nelson Shin attended the ASIFA general assembly in Annecy, France and gave the first report on ASIFA-Korea ("AWN," 1997c, pp. 8-9).

Not only industrial organizations were established and run, but also academic research organizations were started for the professional study of comics and animation in Korea. The Korean Comics and Animation Society was established on December 20, 1996. Its president is Cheongsan Yim, who is a professor in the Cartoon Arts Department of Kongju National Junior College. The Society has been growing and provided its first award to outstanding academic research on comics and animation on May 1, 1998. On the same day, the Society held a conference where the following papers were presented: "Sex and Love in Disney's animation" by Jeong-A Yi, "Vitalization of Character Products in the Animation Industry" by Hyejeong Yim, "Intrinsic Nature of Cartoon Media" by Seokwhan Kim, and "A study of Japanimation Simulation" by Changwan Han ("Manwha animation," 1998). The Association has published its journal *Manwha Animation Yeongu* (Comics and Animation Study) since 1997 annually.

The Korea Cartoon & Comic Culture Research Institute (KOCORI) of the Korean Cartoonists Association is now running a year round educational program of cartoons.

Since 1997, the students of the Institute have studied popular culture theories, organized seminars, and written criticisms, and has finally published its second annual collection of theses.

Animation Publications

The very first academic study of cartoons in Korea was the series of five articles entitled "Manwha Immun" (Introduction to Cartoons) in 1930, by Dongseong Kim who studied journalism in America. Since the articles, no other studies or research were published until 1971 when Jonghyeon Kim published *Adong Manwharon* (A Study of Children's Cartoons). Then, these studies followed: *Manwha Jakbeop* (How to Draw Cartoons) by Gijun Park in 1975, *Hangukmanwhae Hyeonsil* (The Reality of Korean Cartoons) by Gyuwon Oh in 1981, *Hanguk Sisa Manwhasa* (The History of Korean Editorial Cartoons) by Haechang Yi in 1982, and *Hanguk Shinmun Manwhasa* (History of Korean Newspaper Cartoons) by Youngok Yun in 1986. In the midst of the growing academic need for cartoon studies, *The Cartoons: Communication to the Quick* by R. Harrison (1981) was translated under the title, *Manwhawa Communication* in 1989, while Seongil Whang produced *Animaiton Yeongwhasa* (A Hisotry of Animaiton) in 1990, which dealt with foreign animation histories, along with those of Korean animation. He also wrote *Animation-e ihae* (Understanding Animation) in 1997.

In terms of theses, the first master's thesis on cartoons was about the impact of cartoons upon the general attitude of children (Eunhyeon Baek, 1973). Later, studies

in universities focused on "cartoons and children" (S. Jeong, 1979; S. Park, 1985; C. Geum, 1986; S. Kim, 1989), along with aesthetic approaches (S. Yi, 1985; C. Yim, 1992). In addition, a study approached cartoons as a medium of public relations (J. Min, 1989).

In 1995, when Korea was in the surprising boom of animation. Changwan Han wrote an important research book *Hanguk Manwha Saneob Yeongu* (A Study of the Korean Cartoon Industry), based on his master's thesis at Sogang University. The book quickly became an academic guideline for the industry. Shinae Yun and Gwangwoo Rho also wrote their master's theses on the Korean animation industry in 1995. Later, three other master's theses were written in1996 and two in 1997.[25] However, no academic research on the Ph.D. level has been done, yet.

The first animation periodical in Korea appeared in August 1995. The bi-monthly animation-exclusive magazine *Animatoon* was initiated by the AKOM production company; since then, it has also carried English translations: reports on the domestic and overseas animation industries and international festivals and expositions. In July 1997, another animation magazine *Motion* was inaugurated by Dongwha Publishing

---

[25] Hijeong Choe. (1996). Gungnae tema parke kaerikteo gaebal mit wharyonge gwanhan yeongu [Study of domestic theme park characters and their uses], Master's Thesis, Hongik University, Seoul, Korea; Gyeongsu Kim. (1996). Hyoyuljeokin Jejakbanghyange gwan han yeongu [Study of effective management of production], Master's thesis, Myungji University, Seoul, Korea; Yi, Jiyeon. (1996). Animatione jangmyeon jeonwhangibeope gwnahan yeongu [Study of scene transfer skill in animation], Master's thesis, Gungmin University, Seoul, Korea; Hakje Yi. (1997). Tema parke gwanhan yeongu—Haeyang parke gwanhayeo [About theme park—about marine park], Master's thesis, Gyeongseong University, Seoul, Korea; Sujin Kim. (1997). Animation character-e gwanhan gochal [Study of animation characters], Master's thesis, Chosun University, Gwangju, Korea.

Company. Different from *Animatoon*, the monthly magazine intensively introduced Japanese animation, which is not allowed to be played in Korea.

The Korean animation industry has made an important record for itself in publication. *Armageddon Whitebook* was published by the Armageddon production Committee in 1996, following presentation of the contents to the public on October 16, 1996. *Armageddon Whitebook* included personal experiences, comments, and suggestions on each step of the animation production procedures. The writers in charge of each part of planning, production, post-production, distribution, financial management, promotion, etc. explained their actual experiences and discussed current problems and the situation of the Korean animation industry.

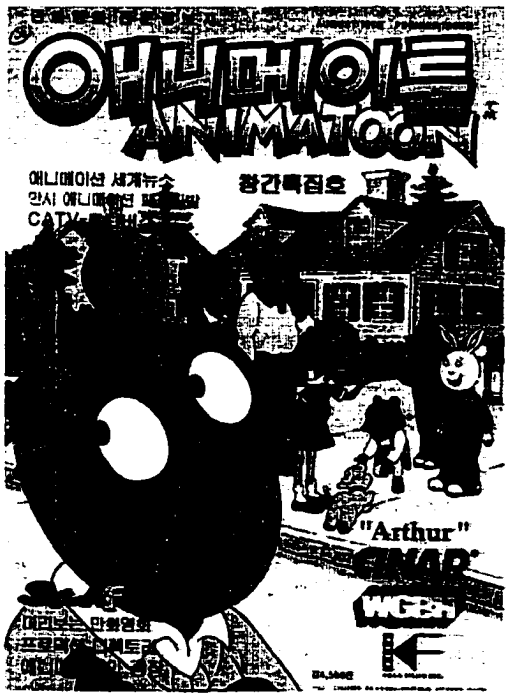


Figure 3-49. Inaugural issue of *Animatoon.* (August, 1995)

Figure 3-50. Inaugural issue of *Motion.* (June 1997)

Amateur Animation Production Groups and Fan Groups

The oldest amateur group in Korea is Nemorami which started in May 1988. Nemorami was composed of six students from the College of Arts in Hongik University in Seoul, Its focus was on comics and later, since 1990, also expanded its production to animation. Nemorami has irregularly published the magazine COMIX two times a year. Since 1994 it also produced broadcasting commercial features and animation as a professional production studio ("Animationgye Saebaram," 1995, pp. 102-103).

The MARU studio was initiated with six people in November 1994 for the production of clay animation. Its work "Gongsajung" (Under Construction) was awarded a prize in SICAF 96 ("Bongyeok," 1997, p. 110). Also, in 1994, Digi Art was formed with four computer graphic artists. Its working area is Pusan on the south coast.

In 1995, the amateur production groups prospered along with the industry. Ani-Mal was formed with 12 people who were classmates at the animation production school of Hankyoreh Culture Center. In addition, PEGG, which was named after the nails to hold the papers on the animation disk, was established for adult animation production. PEGG is unusual in that it does not use cels. They draw on the paper and use pastels and water colors ("Saeroun sidoro," 1996, pp. 102-103).

Dahl is another group formed in 1995. It began with nine members with an orientation towards cyber arts using multi-media. Interestingly, the members were professionals, including a CD-Rom production programmer, a background music

composer, and animation script writers ("Animaiton yesure," 1996, pp. 102-103). In particular, when the group made an exhibition in 1997, 4,000 people visited to show their enormous interest in independent animation production groups ("AWN," 1997b, p. 11).

In 1996, ANI was started with eight arts students of the visual design department in Hongik where Nemorami is based. The group tried all kinds of animation on themes that ordinary people can share ("Dayanghan Soje," 1996, p. 98). ANI was a critical response to the same university's amateur group Nemorami which has tried grotesque and exotic themes and pictures.

Also in 1996, C & A was formed as a "total animation research group." The six members of the group have their own specific production areas. Like Nemorami and ANI, the members are from the same department of animation in Keawon Art College ("C & A han jangreu," 1997, p. 102). Motion & Picture started with nine members in March 1997. The members were all graduates of art colleges in Taegu, a city area south of Seoul ("Independent Animation," 1997).

Besides amateur production groups, animation fan and animation mania groups are actively alive on the internet. About 40,000 people have joined the animation mania group Animate in Hitel, 13,000 people in Naunuri, and 20,000 in Cholian and Unitel as of May 1997 ("Issue: Animationjok," 1997). In the case of Hitel, there are now 13 total animation fan groups, such as Animate Forum and Animation Vocal Actors Study, etc. The groups share opinions, have regular meetings two or three times a month, publish group bulletins, and preview unreleased foreign animation. However,

most groups are inclined to Japanese animation, not domestic. There is only one mania group for domestic animation, Hopiwa Chadolbawi, the name of feature animation released in 1967 (Jeon, 1998, p. 88).

In addition to Nemorami and ANI of Hongik University, other universities and colleges also have animation mania groups, such as Grimteo (Field of Drawings) of Seoul National University, Manwha Sarang (Love of Cartoons) of Yonsei University, Cane in Joongang University, Mania in Pohang Industrial University, and Ani World in Hallim University. However, most of the school groups are not on the level of actual production; they just review animation ("Gungnae Animation," 1996, p. 100).

Educational Institutes for Animation

The Hanguk (Korean) Animation Academy is the most recently established animation education institute in Korea (March, 1999). Yeongwha Jinheung Gongsa established the school with the help of the Korean Movie Academy which has taught students for fifteen years. The school's slogan was "Conquer the World of Animation in ten Years" ("Animation 10nyunnae," 1999). In 1997, a Cartoon and Animation Department was launched at the National Institute of Visual Arts (Gungnip Youngsangwon) in the Korean National Conservatory of Arts, becoming the fifth four-year university level department following Sangmyung University, Sejong University, Suncheon University, and Hanseo University, all of which were initiated in 1996. Eleven two-year colleges of ten different departments for cartoons and animation education also existed in Korea as of 1998. Except for Kongju National

Junior College, founded in 1990, most of them started in 1995. Also, even though they started earlier in 1974 and 1991, Seoul Institute of the Arts and Indeok Junior College, respectively, began to insert animation education courses in their programs recently as a response to the rapidly growing industry ("Gungnae Animation Gyoyuk,"1996, pp. 94-98; "Gungnae Animation Gyoyuk," 1998, pp. 80-89; "Student's Works,"1997, pp. 120-147; also see Table 3-7).

Moreover, one two-year college and two high schools will be added to the list of the Korean animation educational institute in March 2000. Chunchon city's enthusiasm toward animation and comics will make birth to Chunchon Information College of two years program of digital visuals and sounds, animation productions, visual designs, information management and computer graphics for 480 students in a year. Also, the city will establish the Cartoon Art High school in March 2000 ("Chunchon Multi Media," 1999). Another high school named Visual Cartoon High School will be followed in Gyeonggi Province near Seoul in March 2000, which will provide four classes of 30 students each for each year. The high school plans to have an animation department and comics department ("Gyeonggi: Yeongsang," 1999)

Table 3-7. Animation Educational Institutes in Korea

Name	Dept. Name	Since	Study Year	Faculty	Admission
Hanguk Animation Academy		1999	2		12
Sangmyung Univ.	Dept. of Cartoon	1996	4	1 full-time 1 part-time	40/year
Sejong Univ.	Dept. of Cartoon and Animaiton	1996	4	5 full-time	40/yr
Sejong Univ.	Center of Fine Arts	1996	1		50/yr
Hanseo University	Dept. of Arts	1996	4	3 full-time	40/yr
Sunchon National University	Dept. of Cartoon Arts	1996	4	1 full-time 5 part-time	25/yr
The Korean National University of Arts	The School of Film and Multimedia, Dept. of Animation	1997	4	1 full-time	15/yr
Chunchon Information College	Animation Production Dept.	2000	2		80/yr
Seoul Institute of the Arts	Dept. of Visual Design	1974	2		
Indeok Junior College	Dept. of Illustration	1991	2	5 full-time 6 part-time	160/yr
Kongju National Junior College	Dept. of Cartoon Arts	1990	2	4 full-time	88/yr
Kongju Cultural University		1998	2		
Pusan Junior College of the Arts	Dept. of Cartoon Arts				

Table 3-7. (Continued)

Name	Dept. Name	Since	Study Year	Faculty	Admission
Pusan Institute of the Arts	Dept. of Cartoon Arts	1995	2	2 full-time	80/yr
Keawon Art College	Dept. of Animation	1995	2	5 full-time	80/yr
Kyungmin College	Dept. of Cartoon Arts	1995	2	4 full-time	120/yr
Woongjin College	Dept. of Animaiton	1995	2	3 full-time	80/yr
Myungji University	The Institute for Adult & Continuing Education. Dpt. Of Creative Art for Comics	1995	1	6 full-time	
Myungji University	Dept. of Character Arts	1998	2		
Chung Kang Junior College of Cultural Industries	Dept. of Animation	1996	2	4 full-time	80/yr
Manwha Yesul Gogyo (Comic Art High School at Chunchon)		2000			
Yeongsang Manwha Gogyo (Public Visual Cartoon High School)		2000			120/yr for animation and comics major
Kyunghee University	Digital Visual Lab	1997	6 months		
Sogang University	Multimedia Creation Professional Course	1996	6 months		80/6months

Conclusion

The small industry that started so quietly in 1956 with an animated advertisment has grown into a major industry which by 1996 grossed nearly $129 million (Vallas, 1997, p. 5). Historically, the Korean animation industry was inclined to overseas subcontracting even though there was a high demand for domestic animation in the market. Ironically, the broadcasting station TBC, which is supposed to be the primary financial sponsor of domestic animation initiated the first overseas subcontracting in 1966 when Korea's first feature animation "Hong Gil Dong" and "Hopiwa Chadolbawi" were to be released in 1967. The other broadcasting companies had imported foreign animation rather than making their own domestic animation until 1987 when Korea's first television animation was made by KBS and MBC. Different from the broadcasting companies of the major subcontracting client countries, those in Korea have neglected their important role in the industry for a long time. In fact, broadcasting companies as the primary client of animation production should have been the primary sponsors.

On the other hand, it is regretful to see that the early sponsoring companies, such as Segi company, for instance, poorly rewarded the promising animators for their interest. This resulted in the loss of the most talented Shin brothers from the industry. The Korean animation industry has been suffering from the lack of steady and sufficient financial sponsorship in its forty year history. The production companies had to support the production of their own animation for a long time. In this sense, it

was also natural for the Korean animation production companies to be inclined to overseas subcontracting, rather than to their own costly production.

Also, due to unstable changes in the labor markets of the client countries, such as strikes and high rising wages of animation workers, the countries became interested in the cheap, stable, and skilful labor of Asia. One of the Asian countries was Korea, which had just endured the Korean War (1950-1953) and was strongly driven towards exportation by the authoritive government's economic development plan since 1961.

The Korea animation industry's major client countries are America, Japan and the European countries which followed them later. In terms of regional closeness, it is reasonable for the industry to subcontract Japan's animation works. However, in the case of America, it is interesting that the Korean Americans played an important role in bringing the American work to Korea. The American animation work was transferred into Korea by those who studied and worked in America, such as Steve Hahn and Nelson Shin.

Historically, the production of Korean domestic animated features had rises and falls with two vacuum periods in the 1970s and the late 1980s through the early 1990s. Interestingly, however, the industry was still producing overseas animation even in the vacuum period. In other words, the vacuum of domestic animation means prosperity for overseas subcontracting. However, that the overseas work thrived later caused the production boom of domestic animation. The industry began to have sponsors from inside as well as outside. Co-production through a consortium of sponsors from domestic and overseas sources became the survival strategy of the industry.

It is important to see that the animation boom in Korea in the mid-1990s was strongly triggered and supported by the Korean government (see CHAPTER 4 for the role of the government in detail). In the history of Korean animation the year of 1995 was the epoch making year in which the industry had a great turning point toward the age of revival. The first government-supported Seoul Cartoon and Animation Festival was held, the first bi-monthly animation magazine was inaugurated, and as many as five colleges and universities began comics and animation education. Another five institutions initiated cartoon education in 1996 too.

The industry is now facing a new era where cel animation will be obsolete due to environmental protection (Nelson Shin, personal communication, August 7, 1995). Thus, digital computer animation will be a substitute, and overseas subcontracting accordingly will face serious changes. The industry will need not only the people with computer animation skills but also highly advanced equipment and software. In terms of the rising number of animation education institutes, the industry will cope with the changes.

CHAPTER 4

ECONOMIC ASPECTS OF KOREAN ANIMATION INDUSTRY

Introduction

Basically, the Korean animation industry has been structured primarily on the needs of overseas clients, not the demands of a domestic market. Accordingly, the animation industry's financial ability for domestic production has been dependent upon subcontracting overseas animation. Since 1995, however, the industry's financial sources have variously ranged from the government to private companies, such as the industrial conglomerates, Samsung, Lucky Goldstar (LG), Ssangyong, Dongyang and Dongwon, newspaper companies, and broadcasting companies as well as animation production companies. The economic reason for the support for the industry from the various sources is that the industry is publicly described as "a goose producing golden eggs."

The golden eggs include not only the animation but also its spin-off products which make much more money than the animation itself. This economic attraction is known as "one source, multi use" in the industry (S. W. Park, 1998). The animation as an original source can extend its industrial possibilities to such different areas as computer games, toys, clothes, stationary, publications, advertising, amusement parks and even musicals[26]. Animation's industrial possibilities have been recently recognized not only by the Korean industrial conglomerates but also by overseas

investors, for instance, Rupert Murdoch who revealed in an interview that he would invest in animation along with his satellite broadcasting business in Korea (Jin, 1998b). In addition, the animation industry is a "pollution-free industry." This is another reason that both the central and local Korean government pay great attention to animation as a future form of industry.

In this context, this chapter will take a thorough look at the economic characteristics of the Korean animation industry and its economic condition in terms of domestic and overseas markets, production companies, and wages. Also, the chapter will discuss the economic relationship between the industry and other industrial conglomerates, television stations, and government authorities.

Economic Characteristics of Animation Production

Technical Characteristics

Animation utilizes the techniques of stop-motion cinematography whereby the camera is stopped after exposing single frames to allow adjustments for the next frame's movements. Obviously, this method is a time-consuming one, requiring considerable manual labor and skill, not to speak of timing and motion (Halas, 1976, p. 10). This time-consuming and labor intensive animation production brings about a division of labor into three parts: pre-production, production, and post-production.

---

[26] "Beauty and the Beast" and "The Lion King" were transferred to musicals. In particular, "The Lion King" was put on the stage in Amsterdam Theater in New York in November, 1997 with the production cost of 14 million dollars.

The production of animation is the part which is based on the labor intensive picture drawing for the frames of the animated films. Animation as a form of film uses twenty four frames a second. Accordingly, in principle, even one minute of fully animated film needs 1440 frames (twenty four frames times sixty seconds) to be filled with different pictures describing the moves, excluding the backgrounds, overlays and cels for additional animated figures or objects. According to Halas (1976), full animation requires at least eight drawings per twenty four frames and limited animation does less than eight drawings per twenty four frames (p. 20). This characteristic raises the important economic issue of economizing production costs. The production costs can be lowered by reducing the number of pictures and/or by using cheap labor to draw the pictures. The first leads to limited animation skills and the latter causes international subcontracting.

Usually, animated feature films use full animation skills and television animation uses limited animation skills. Historically, as we discussed previously in Chapter 2, Bill Hanna and Joe Barbera revolutionized the American animation production by both converting from the full animation to the limited animation and sending much of the work overseas in the 1960s (Lent, 1998, p. 243).

Japan is well known for the limited animation skills to economize production costs. Japanese animation uses special camera techniques--extreme close-ups, zoom-ins, zoom outs, tilting, and dynamic changes of dazzling colors--in order to make up for missing pictures. These skills lower production costs and make Japanese animation highly competitive in international world markets (C. Han, 1995b, p. 92).

However, limited animation can bring about a hazardous impact upon children viewers. The dazzling lights in the animation "Pocket Monsters" sent about 730 children in Japan to the hospital in one evening. The Japanese children suffered convulsions, headaches and nausea as they watched the animation on television. The final scene of the animation showed explosions, and the explosions radiated strong blue and red lights continuously for three seconds (Seungjae Yu, 1997). Later, the Japanese Health Ministry reported that ten percent of the audience of the animation experienced spasms because the strong radiation from the scenes increased the audience's brain waves. The Ministry advised audiences to keep at least one meter distance from television ("Il TV Manwha," 1998).

Furthermore, using limited skills in animation production intrinsically has to do with the fast violent actions which just do not need as many different pictures as full animation. Interestingly enough, the violent actions in animation are effectively expressed within a small number of dynamic pictures. That is, limited animation skills are used for fast moving actions for violent action animation.

Original Production Cost and the Reproduction Cost of Copies

Like other visual products, most of the animation production cost is composed of the first original production cost and the reproduction cost for later copies. Thus, the sooner the original copy cost is regained, the more actual profits the animation will make from its reproduction as video cassettes or re-broadcast as television animation. In addition, the recovery of the original production cost is secure when there are

multiple reviews in which the animation is shown. In this sense, unlike animated features, television animation has more ways to regain its original production cost on the air. Television animation can be broadcast many times until its production cost is recovered, while animated features have comparatively limited channels--a small number of theaters. It has been reported that the original production cost of Korean television series animation is usually recovered in the first three years after its first broadcast, and it makes actual profits in the later years. It is reported that the usual longevity of television animation is ten years in Korea (D. Kim,.1997, p. 43). In this context, spin-off products from television animation make profits during the latter seven years. Moreover, since 1995, the Korean animation industry enjoys a cable television system which also extends the animation's market life longer than before.

The actual production cost of an eighty- or ninety- minute domestic television animation ranges from $187,000 to $260,000 in the case of MBC ("SBSga," 1996, p. 36). Table 4-1 shows that "Bidulgi Hapchang" (Chorus of Pigeons) made an income of $189,598 from advertising slightly over its production cost of $187,254 after having been broadcast only three times. However, "Meoteol Dosa" (Master Meoteol) made just $70,375 from advertising income out of its original production cost of $194,875. In this sense, $124,500 was lost in the first broadcast of "Meoteol Dosa," However, when it comes to exportation and selling it in video cassette format, the television animation creates longer term profits.

Table 4-1. Production Cost of Television Animation and Advertising Income

Title of Animation	Production Cost	Advertising Income
Bidulgi Hapchang (broadcast 3 times)	149,803,470 Won ($187,254)	151,679,000 Won ($189,598)
Taegwondongja Maruchi (broadcast 3 times)	153,816,500 Won ($192,270)	130,630,000 Won ($163,287)
Dodani (broadcast 2 times)	155,900,600 Won ($194,875)	113,436,000 Won ($141,795)
Meoteol Dosa (broadcast 1 time)	155,900,600 Won ($194,875)	56,300,000 Won ($ 70,375)

(Report of animation production plan of MBC as cited in C. Han, 1995b, p. 211)

Spin-off Products of Animation

Animation is a field of applied art which requires high creativity and techniques of artistic impressions to bring about emotional assimilation with the characters in animation. When emotionally assimilated, the audience is motivated to purchase the related goods from various outlets, such as animation character products, musical records of animation songs and background music, electric games, entertainment theme parks, video tapes, cable television, art cels, publications, and so on. These various outlets make the longevity of animation much longer than the animation itself.

For example, "Batman" as a theatrical release was certainly successful, grossing $250 million at the box office. But, more successful were the ancillary sources of income which totaled over $500 million from licensing and merchandising deals from the movie. Such figures do not include the revenue from the huge video tape sales, rights for television and international outlets, the increased sales of Batman comic

books which became important sellers for DC as a result of the Batmania, and the continued sales of Batman toys and merchandise that resulted years after the movie mania died down. Less successfully, "Batman Returns" was also a mega-income generator and promotional device for DC and Time Warner (McAllister, 1995, p. 16).

Furthermore, in Korea, Disney Korea made three billion Won ($3.75 million) from cartoon characters and 6.5 billion Won ($8.125 million) from movies, videos, and cartoon character products in Korea for a month, September to October in 1992. As a result, Disney Korea made about $12 million in just a month (C. Han, 1995b, p. 100, p. 188). Further, in October, 1992, Disney removed its Korean agent and established its own branch in Korea. Its sales goal was 40 billion Won ($50 million) in the following year (C. Han, 1995b, p. 190; J. H. Kim, 1996, p. 232).

Art cels in animation deserve special attention. As seen in Figure 4-1, the collectable values of a cel drawing of Warner Brothers' "Tweety" costs $1,200; "Bug's Hugo and Marvin" costs $1,500 in America according to an art cel brochure in 1997. Korea began to pay attention to art cels in animation in the year of the Seoul Olympics in 1988, when the Korean character merchandising industry started to grow. Currently, as we discussed previously in CHAPTER 3, the cartoonist Jaedong Park is selling his art cels in order to fund the animation he is planning. However, the art cel market is not prosperous now.

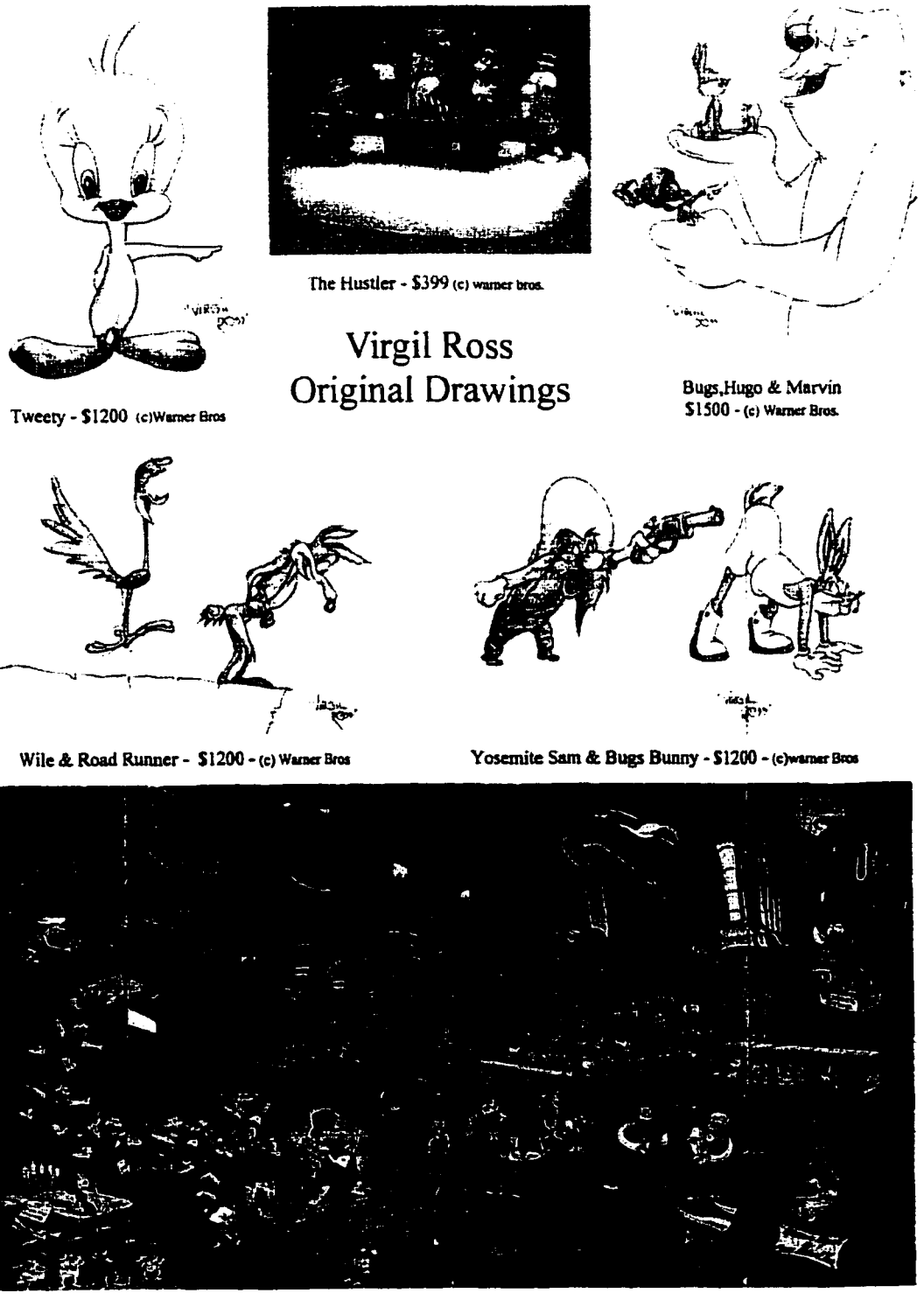


Figure 4-1. Prices of Art Cels. (Alexander Ross Gallery at http://www.alexander.com)

Economic Conditions in the Korean Animation Industry

Seasonal Structure of the Industry

As we can see in Table 4-2, the Korean animation industry is dependent upon American subcontracting, which comprised seventy four percent ($46 million) of the entire animation export in 1993. It grew to $115.13 million market in 1998. Dependence on overseas subcontracting, especially on the subcontracting of American television animation series makes the industry seasonal; there is work for six months, the so called "hot season," and a recess for the other six months. American subcontracting usually starts in May and has to be completed by September for broadcasting in the USA. Then, the industry waits for more work in the next year.

Table 4-2. Korean Animation Export by Subcontracting
(in thousands of U.S. dollars)

Year	U.S.	Japan	France	Germany	Others	Total
1988	7,744	5,323	1,088	0	506	14,665
1989	17,348	1,539	2,681	12	825	22,385
1990	26,348	3,850	4,200	68	2,988	37,454
1991	38,203	2,301	7,022	3	8,331	55,850
1992	44,916	3,231	4,394	140	8,302	60,983
1993	46,162	2,981	8,337	1,223	3,448	62,151

(Statistical report of the Korean Trade Association in 1993 as cited in C. Han, 1995b, p. 96; also see Table 4-9 for the export after 1993, p.166)

As a result of the seasonal structure, the industry has had to have been based on ephemeral production companies and floating animators who are an essential part of animation production.

In terms of ephemeral production companies, the Korean Animation Producers Association (1995) reported that sixty five companies were registered in the Association in 1995. Meanwhile, there are just thirty animation companies officially registered as international trading companies. However, if we include the small companies which perform only a part of the production procedure, such as coloring, there are 450 companies in Korea (C. Han, 1995b, p. 201). Among the companies, a few major ones, such as Seyoung, Hanho, Dongyang (later Ko Ko), AKOM, Saerom, Sunwoo, Dai Won, Plus One, and Han Shin, which have more than 200 employees[27] (see Table 4-3), perform about sixty percent of the overseas subcontracting work each year in Korea. The other forty percent of the production by small companies is done by so called double and even triple subcontracting between a small number of major companies and many other small companies.

The studios have been geared to the needs of overseas clients who concentrate on their production from April to October every year. Thus, the studios have to endure a shutdown period from October to March. In order to survive this, studios accept overseas work beyond their capacity, and then another phase of subcontracting happens as the primary studios farm out work to smaller size studios which appear and disappear according to the busy and slow seasons (Rho, 1995, p.8).

Table 4-3. Exports of Major Animation Companies in Korea in 1994
(unit: thousand U.S. dollars)

Company	Sub-contracted Shows	Employees	Export Amount	Main Clients
Se Young	120	300	10,800	Prince Valiant (USA)
Hanho	80	300	8,000	Warner Bros. (USA, Canada)
Dong Yang	70	200	7,000	Warner Bros. (USA, Japan)
AKOM	70	250	7,000	Warner Bros. Film Roman (USA)
Saerom	48	300	4,800	DIC (USA, Germany, Spain)
Ani Vision	45	250	4,500	Film Roman (USA)
Sun Woo	40	200	4,000	Walt Disney (USA)
Daehan	40	150	4,000	Warner Bros. (USA, Canada)
RDK	35	120	5,200	Film Roman (USA)
Plus One	25	100	2,500	MIK (USA)
Tae Sang	25	90	2,500	Nelvana (Canada)
Won Shin	20	100	2,000	DIC (USA)
Point	20	80	2,000	DIC (USA)
Rainbow	10	100	1,000	DIC (USA)
Hahn Shin	10	200	1,000	France
Hyun Young	5	80	500	USA, Canada
Anitel	5	70	500	USA
Total	668	2,890	67,300	

(CAD & Graphics report as cited in Yun, 1995, p. 32)

[27] AKOM Production Co., has now 875 employees, Hanho 526, Hahn Shin 510, and Plus One Animation Inc., has 312 workers in their actual production line in 1999.

Most of the small companies are not able to sustain themselves in the recess period, and the industry suffers from the ephemeral rise and fall of the small companies. As a result, there has been a trend to form studio groups with one large studio taking smaller studios under its wing and presenting the group as one large holding. A recent example of this was the Rainbow Animation Studio group (more recently renamed Galaxy World, Inc.) which was put together by Ted Choi, a Korean business man who lives in Los Angeles and came from the garment business. This system is simply an extension of subcontracting. But, the group is often made up of totally separate business entities, with completely different agendas. The group is only held together by the main studio's ability to supply everyone shows for a reasonable fee. After a while, the small studios grow unhappy with the large studio from which they receive work. The large studio naturally skims a percentage of the client's fees, and the studio doing the work feels unappreciated and underpaid. Also, if the show is successful, the large studio takes the bows--egos are fragile things (Vallas, 1997).

Interestingly, even during the recess time, the production companies are not free to take care of producing domestic animation. In light of the subcontracting schedule, they have only five or six months to put their energy into the creation of domestic animation which needs usually a year of production time. Thus, the production of Korean domestic animation is often put aside, and sometimes the companies refuse to take domestic production. As a result, the animated feature "The Return of Hong Gil Dong" (1995) was sent to Japan to be produced and "Blue Seagull" (1994) was made in just three months lest it interfere with the industry's overseas subcontracting

schedules. Also, "Armageddon" (1996) spent ten months in actual production. During this time, however, the production schedule was delayed. The contracted production companies were caught in a delayed schedule, turning down other works in the busy season (J. Kim, 1996a, p. 81).

Korean Animators and the Industry

Animatoon (1996a) selected 15 animators who are presently leading the industry (see Table 4-4). Six animators started their careers as cartoonists, but some of them were quickly involved in animation production through the animation department of the broadcasting station TBC (Dongyeong Yi and Junung Yi), and the studios of animated commercials (Nakjong Kim). In particular, TBC let the other animators start their careers there by subcontracting Japanese animation (Jeonggyu Yim and Jeonggil Bae). Also, the studios producing animated commercials such as Shin Dong Heon Production and Shin Neung Pa Animation Studio enjoyed a boom in the 1960s.

Table 4-4. The Leading Animators in Korea

Name	Start	Careers and Major Works	Comments
1.Gwang-shin Gang	1963	25 years as a director (Segi Sangsa and Gukje Art in 1967, Universal Art in 1972, Hanho in 1974, established Miro in 1977, Dongseo in 1980, Take One in 1982, Samyang Dongwha in 1984, established Mirim Art in 1986, Whain Art in 1987, established Top Ani in 1988, Hnaho in1989, Ani Rom in1994) "Hong Gil Dong," "Baba Papa," "Snoopy," "Smuff," "Conan"	Began with "Hong Gil Dong"
2.Dong-yeong Yi	1962	30 years (animator in TBC since 1966, Segyeong Heungeop in 1971, Miro in 1972, Take One in 1983, established Yerim in 1991, teaching in Myeongji Univ. since 1995) "Dokgotak," "Manwha Inmul Hanguksa," "GI Joe," "Denver," "Ninja Turtle"	started with editorial cartooning; currently C.E.O of Yerim Animation
3. Junung Yi	1966	4 years as an assistant animator, 5 years as a key animator, 18 years as a director (TBC in 1966, Universal Art in1972, Yunseong Sireop in 1973, Tokyo Movie in 1976, Dongseo Dongwha in1979, Saerom in 1992 "Doksuri 5 Hyeongje," "Little Viking," "Heidi," "Rupang III," "Chip Munk," "Sonic," "Water Mass"	Started with children cartooning
4. Songpil Kim	1968	Shin Neungpa Animation Studio in 68, Yunseong Sireop in 1974, YS Ani in 1978, Taewoo Sireop in1980, Take One in 1982, AKOM in 1985 "My Little Pony," "Moon Dream," "Muppet Baby," "Huckleberry Fin," "Lucky Look," "Little Viking Vecky"	

Table 4-4. (continued)

Name	Start	Careers and Major Works	Comments
5. Nakjong Kim	1968	Adult cartoonist in 1967, Shin Neungpa Animation Studio in 1968; assistant and key animator in Yunseon Sireop, Swan Lu, YS Ani, Taewoo, Dongseo Sireop, Donga Yanghaeng, Hanho, and Take One in1974-85;10 years as a director in AKOM since 1985 "Potato Head," "Moon Dreamer," "My Little, Pony," "The Simpsons"	Started with adult cartooning
6. Deok-seong Mun	1964	30 years (children animation 1964-75, animated commercials 1970-80 "Dokgotak-Dasi Chajeun Mound"	C.E.O. of Seong Production
7. Jong-seon Yi	1973	10 years as a director (Golden Bell in 1973, Dongseo Dongwha in 1981, Hanho at present) "Chip & Dale," "Winnie the Pooh," "Swat Cat," "Conan," "Magic School Bus," "Free Willy," "Never Ending Story"	
8. Jeong-gyu Yim		25 years as a director (TBC, Segi Snagsa, Seoul Dongwha, Sunwoo Animation, Hanho Heungup, Plus One) "Golden Bat," "Yogwoe Ingan," "Maruchi Arachi," "Byeolnara Samchongsa," "Spider Man," "Hulk," "Darkwin Duck," "Felix the Cat"	
9. Jeong-gil Bae	1966	TBC in 1966, Universal Art in 1971, Segyeong Dongwha in 1973, established Miro Dongwha in 1976, Dongseo Dongwha 1980-84, currently at Hanho "Golden Bat," "Mazingga Z," "Spider man," "Neverending Story," "Magic School Bus"	

Table 4-4. (continued)

Name	Start	Careers and Major Works	Comments
10. Jeong-ryul Song	1965	Cartoonist 1965-76, animator at Segyeong Heungup in 1976, Yu Production in 1979, Dong-A Giwhoek in 1980, KBS in 1988, Hanho Heungup in 1989, established Saehan Animation in 1993 "Santo Bukito" of Klasky Csupo, "Agi Gongryong Dooli," " Kobi Kobi"	Started with cartooning; C.E.O. of Saehan Dongwha
11. Chun-man Yi		Directors at Dongweo Dongwha, Geukdong Dongwha, AC Production; established Unique Production in 1985, established Plus One in 1991 "Smuff," "Felix the Cat"	C.E.O. of Plus One
12. Hang-deok Jo	1978	Shinseong Dongwha in 1978, Taewoo in 1979, Hana Art in 1980, Take One in 1982, AKOM in 1986 "Little Pony," "Ani Maniac," "Tiny Toon Adventures	
13. Yeong-rang Bae	1958	Children's cartoonist since 1958; directed "Robot King" in 1982	Started with Children cartooning
14. Yeong-sang Yun	1968	Children cartoonist since 1968; animator since 1978; currently at Sunwoo Animation "Aladdin," "Gargoyles," Agi Gongyong Dooli," and animated commercial "Miranda" and "Ssek ssek Orange"	Started with children cartooning

Table 4-4. (continued)

Name	Start	Careers and Major Works	Comments
15. Gang-mun Byeon	1975	Hanguk Ilbo cartoon team leader in 1975, Universal Art in 1976, Segyeong Dongwha in 1976, Dai Won Dongwha in 1979, Dongseo Dongwha in 1981, Sunwoo Production in 1987, hanho Heungup in 1993 "Cheorin 007," "Mazinga Z," "Grandizer," "Nanjung Ilgi"; subcontracted animation of Hanna Barbera and Disney	
16. Cheonggi Kim	Early 1960s	Segi Sangsa in 1967, Seonjin Advertising in 1971, established Key Animation Studio in 1973, established Seoul Dongwha in 1975 32 years of animated features including "Robot Taegwon V," "Whanggeum Nalgae 1.2.3" and "Im Ggeok Jeong"	Started with cartooning

("Hanguk Animaitongye," 1996; "Yeoreum Banghak," 1997)

When it comes to the animators' change of production studios and companies they have worked for, records show that they moved their working places in the short term. In the case of Hangdeok Jo, he started his career in Shinseong Dongwha in 1978, and moved to Taewoo Dongwha in 1979. Again, he changed to Hana Art in 1980, and moved to Take One in 1982. Finally, he settled in AKOM in 1986. He had to move because the studios did not last. The rise and fall of many animation production studios occurs even within a single year ("Hanguk Animaitongye," 1996, p. 15). For another example, the animator Gwangshin Gang moved his working place thirteen

times in twenty seven years, and Nakjong Kim also changed his place nine times in seventeen years, both averaging two years in a place.

Therefore, the ephemeral and seasonal conditions of the industry brought about a tug-of-war between the production companies competitively looking for animators in the busy seasons. Thus, the animators have been moving around in the industry looking for higher salaries. The production companies played the money game in order to catch skilful animators who were essential for subcontracting (N. Shin, 1996b, p. 80).

As a key animator, Junung Yi spent four years to be a key animator and Huncheol Ju spent three years. According to Siu Yi (1996), it takes five years experience on average to be a key animator (p. 100). Also, to be an animation director, the animators needed eight to thirteen years from the start of their careers. Gwangshin Gang started in 1963, and he had been a dircetor for twenty five years in 1996. As a result, he spent eight years before he became a director in animation production. Junung Yi spent four years as an assistant animator and five years as a key animator. Then, he became a director after the previous nine years. Huncheol Ju spent ten years as an assistant and key animator to become a director, and, further, Jongseon Yi spent thirteen years to become a director.

The Wage System of Animation Workers

The Korean animation industry has been declining since the late 1980s even though its total export has been growing (Table 4-8). After the Seoul Olympic games

in 1988 the Korean labor market has enjoyed rising wages. The wages have been rising so rapidly that Korea is losing its international attraction as a source of cheap labor. Especially in the animation industry, the overseas clients started to turn their eyes to China and Southeast Asian countries where cheaper labor was available (C. Han. 1995b. p. 97).

Figure 4-2. Coloring Workers at KoKo.

Figure 4-3. Background workers at Hanho.
("Animatione Saeroun," 1995, p. 47)

However, it is a situation that threatens the livelihood of the some 20,000 people employed at 450 studios. These workers, along with the major individual companies, provided the basis for a transition from subcontracting to local production. This resulted in development and planning departments' being set up in the large studios (C. Park, 1997).

According to Lent (1998), Korean animation workers are paid almost twice as much as the other Asian countries' workers (Table 4-5). For example, Korean key animators are paid $4,000 through $13,000, while the other Asian countries' animators

are paid around $2,000 a month.[28] According to another report (J. S. Choi, 1998), the rookie assistant animators are paid 400 Won (fifty cents) through 600 Won (seventy five cents) by sheet. Their first monthly pay is just around 100,000 Won ($125), and 700,000 Won ($875) after a year. After the third year, however, 2,000,000 Won ($2,500) per month is paid for the animators.

Table 4-5. Comparison of Salaries for Animation Workers in Asia (Lent, 1998; Sa, 1995, p. 96)[29]

Country	Wage
KOREA	$ 4,000 - $ 13,000 / month for upper-level key animators (Seoul Movie) $ 1,000 / month for lowest colorist, painter, inker (AKOM, Seoul Movie) $ 1.00 - $ 1.50 / cel for colorist (AKOM)
PHILIPPINES	$ 2,000 - 2,700 / month for animators (Philippines Animation Studio Inc. PASI) $ 100 /week for inkers
TAIWAN	$ 1,900 / month for major animators, which is 60 percent of a U.S. counterpart
CHINA	$ 1,600 - $ 2,000 / month for animators

[28] The cartoonists at the highest level are paid 10 million Won ($12,500) per month and 400 cartoonist members are registered in the Korean Cartoonists Association (S. Son, 1998). According to *Hankyoreh Shinmun* ("Jigeobe Segye," 1999, March 7), the fresh cartoonists are paid 1.5 million Won ($1,875) to two million Won ($2,500), and the cartoonist with five to six years career is paid five million Won ($6,250) to six million Won ($7,500).

[29] The Korean animation workers were also interviewed in Seoul by the author in 1995.

In case of an animated feature, 1,800 Won ($2.25) was paid for a sheet of key animation, and 2,050 Won ($2.56) for a piece of coloring (J. Kim, 1996a), which is twice as much as that in television animation production. In the case of the inkers, they are paid $1,000 a month in Korea, while approximately $400 is paid to the inkers in the Philippines.

Figure 4-4. Computer Workers at Hanho. (Vallas, 1997)

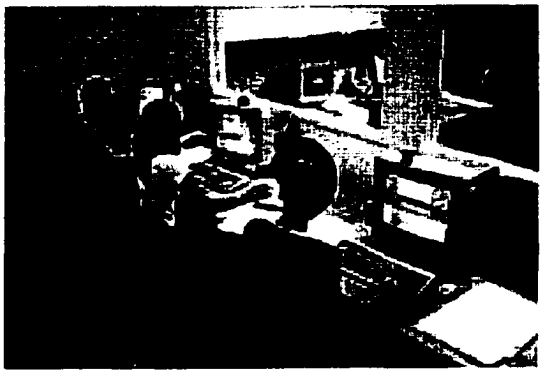


Figure 4-5. Computer Workers at Galaxy World. (Vallas, 1997)

Figure. 4-6. Computer Editing at AKOM. ("Digital Animation," 1996, p. 93)

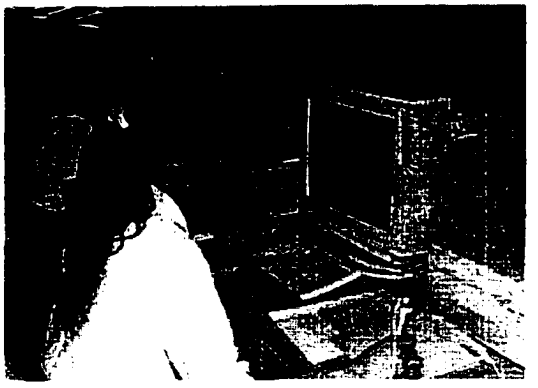


Figure 4-7. Computer Painting at AKOM.

On the other hand, American computer animation artists are getting salaries of $80,000 through $100,000 or more ($6,666 through $8,333 a month), while Korean digital animation directors are monthly paid 3,000,000 through 5,000,000 Won ($3,750 - $6,250), which is almost half of the American artists' salaries ("That's all," 1998; J. S. Choi, 1998).

Table 4-6. Monthly Wages for Major Positions in Animation Companies

(unit: million Won)	**Plus One**	**Hahn Shin**	**Hahn Ho**	**AKOM**
Key animator	3.5 ($4,375)	3.5 ($4,375)	4.5 ($5,625)	3 ($3,750)
Assistant animator	0.8 ($1,000)	1.5 ($1,875)	1.5 ($3,125)	
General director		5 ($6,250)		5 ($6,250)
Camera director		1.5 ($1,875)	3 ($3,750)	
Camera worker			1.5 ($1,875)	
Background artist			2.3 ($2,813)	
Background director			3.5 ($4,375)	
Coloring	0.5 ($650)			0.8 ($1,000)

(S. Kim, 1999; N. Shin, 1999; P. Choi, 1999)

What is interesting about the wage system in the Korean animation industry is that most of the employees are freelancers who are paid irregularly. According to Peter M.

Choi, the C.E.O. of Hahn Shin Corporation, the freelancers are paid by piece, not on a regular basis by time. Thus, the wages in Table 4-6 and 4-7 will vary according to their skillfulness, speed, and careers. As we saw in the historical part (CHAPTER 3), the two periods of work and recess in a year make a great difference in earnings. In the busy season from May through November, the freelance workers are paid as shown in the Tables 4-5, 4-6, and 4-7. However, in the recess time, they are usually paid half of that scale or are even paid nothing from December through April each year.

Table 4-7. Wages of at Dai Won Animation Company

Kinds of Work	**Payment**
Key Animation	9,000 – 20,000 Won ($11.25 - $25.00) / second or foot 47 cents -$1.00/sheet[30]
Assistant Animation	600 – 800 Won (75 cents - $1.00) /sheet
Coloring	450 – 800 Won (56 cents - $1.00)/sheet
General directing	2,000,000 Won ($2,500)/series (30 minutes)
Directing of Assistant Animation	1,200,000 Won ($1,500)/series
Tracing	110 – 200 Won (14 cents – 25 cents)/sheet
Camera	2,000 Won ($2.50)/foot 4,000,000 Won ($5,000)/series
Background	3,800,000 – 4,500,000 Won ($4,750 - $5,625)/series

(Rho, 1995, p. 88)

[30] One second has twenty four frames for a different sheet of pictures. Thus, the figure was divided by twenty four to derive the payment per sheet.

The wage system is closely related to the recruiting system for the animation labor force. The major source of production labor is provided from private educational institutions, such as colleges, professional animation educational institutes, and the YWCA, which gives the students three through six month training programs. Immediately after the training they are hired in animation companies. Interestingly, many women workers are working in their houses as freelancers. They are usually paid 600 Won (seventy five cents) per sheet to start. Working for animation companies at home is one of the popular secondary jobs for women in Korea ("Sudogwon Animation," 1998). According to a report, the number of people working in the industry is about 20,000 (C. Han, 1995b, p. 201).

Figure 4-8. Camera Worker at KoKo.

Figure 4-9. Key Animator in AKOM.
("Animatione Saeroun," 1995, p. 47)

During the 1970s and 1980s, Korea was relied on as a source of cheap labor. When its workforce became more expensive and Korea started to shun low-tech industries, it started to lose subcontracting work to Southeast Asia and China.

Growth of Subcontracting Exports

According to Table 4-8, the Korean animation industry, which made $186,000 in 1980, earned $14.6 million in 1988 Seoul Olympic Games; there was a 135.6 percent growth from the previous year. Later in 1995, the industry made $83.8 million from exports, which made up 99.8 percent of the total visual product exports for the year.

Table 4-8. Korean Movies and Animation Exports by Year (unit: dollar)

Year	Movies	Animation	Total	Animation Growth Rate	Animation/ Total
1980	18,188	186,000	204,188		
1981	9,882	678,000	687,882	264.5 %	98.6 %
1982	9,919	1,621,000	1,630,919	139.0 %	99.4 %
1983	10,742	1,809,000	1,819,742	11.6 %	99.4 %
1984	15,953	1,958,000	1,973,953	8.2 %	99.2 %
1985	10,000	3,700,000	3,710,000	88.9 %	99.7 %
1986	14,200	7,036,000	7,050,200	90.2 %	99.8 %
1987	14,666	6,223,000	6,237,666	-8.8 %	99.8 %
1988	17,347	14,661,000	14,678,347	135.6 %	99.9 %
1989	15,898	22,385,000	22,400,898	52.7 %	99.9 %
1990	121,487	37,454,000	37,575,487	67.3 %	99.7 %
1991	27,814	55,850,000	55,877,814	49.1 %	99.9 %
1992	13,993	60,983,000	60,996,993	9.2 %	99.9 %
1993	12,417	62,151,000	62,163,417	1.9 %	99.9 %
1994	7,625,000	67,375,000	75,000,000	0.9 %	89.8 %
1995	208,000	83,880,000	84,088,000	0.8 %	99.8 %

(Rho, 1995, p. 73; "95 Seoul Gukje," 1995, p. 24; "Je2whoe Seoul," 1996, p. 23)

The major role of animation in exports moved the Korean governmental authorities to identify animation as "an export strategy industry" in 1995. Most recently, Hahn Shin Production Company reported that the Korean animation industry made about $115 million from July 1997 through June 1998 (Table 4-9). It is amazing that the industry has grown by a factor of 620, from $186,000 to $115,000,000 in the eighteen years since 1980.

Table 4-9. Exports by Subcontracting and Han Shin Corporation (1993-1998)
(unit: million Won)

	Export amount By Hahn Shin	Total export Amount by Korea	Total amount of the world animation to be subcontracted	International Portion taken by Korea
July 1992 -June 1993	685 million Won ($856,250)	62.4 billion Won ($78 million)	160 billion Won ($200 million)	39%
July 1993 -June1994	2,767 million Won ($3.458 million)	65.6 billion Won ($82 million)	180 billion Won ($225 million)	36%
July 1994 -June 1995	4,838 million Won ($6.048 million)	71.4 billion Won ($89.25 million)	210 billion Won ($262.5 million)	34%
July 1995 -June 1996	5,389 million Won ($6.736 million)	74.8 billion Won ($93.5 million)	240 billion Won ($300 million)	31%
July 1996 -June 1997	5,012 million Won ($6.265 million)	80.8 billion won ($101 million)	270 billion Won ($337.5 million)	30%
July 1997 -June 1998	7,052 million Won ($8.815 million)	92.1 billion Won ($115.13 million)	360 billion Won ($450 million)	26%

(P. Choi, 1999)

In light of the amount of subcontracting in exports, AKOM seems to be one of the busiest animation production companies in Korea. According to AKOM, it made eighteen billion Won ($22.5 million) in 1997, and twenty billion Won ($25 million) in 1998 in overseas subcontracting. In addition, Hanho takes an important position in that it produced more than $10 million recently: eleven billion Won ($13.75 million) from July 1996 to June 1997, and 11.5 billion Won ($14.4 million) from July 1997 to June 1998 (Table 4-10).

Table 4-10. Recent Subcontracting by Company (unit: million)

Year	Hahn Shin	Han Ho	Year	AKOM	Plus One
July 1995-June 1996	$6.736	$7.75	1996		$8.4
July 1996-June 1997	$6.265	$13.75	1997	$22.5	$7.0
July 1997-June 1998	$8.815	$14.375	1998	$25.0	$8.4

(P. Choi, 1999; S. Kim, 1999; N. Shin, 1999; Y. Shin, 1999)

On the other hand, Hahn Shin gives very suggestive tips for the industry for the future. It is said that American producers usually spend $80,000 through $200,000 for one piece of twenty-minute animation. When the animation is farmed out to Korea, for example, $40,000 is spent for production in Korea, while the other $ 40,000 is spent in America. What is interesting is that the $40,000 in Korea is shared by subcontracting companies with several hundreds of employees, while the other $40,000 is enjoyed by

a few creators in America (C. Han, 1995b, p. 200; Rho, 1995, p. 79). In this context, Hahn Shin's export of $2.6 billion of animation that it created in 1997 (Table 4-11) is enough to be notable, while it made just $8.8 million for overseas subcontracting from July 1997 through June 1998 (Table 4-10). Table 4-11 shows that Hahn Shin's exports reached the amount of $1.86 billion in 1995 and $2.66 billion in 1997, which means that Hahn Shin took more than eighty five percent of the Korean domestic animation export market. The company started as a subcontracting company but the producing of its own animation makes it a model company regarding the economic possibilities of domestic animation.

Table 4-11. Export of Domestic Animated Features by Hahn Shin

	Export by Hahn Shin	Total Export by Korea	Portion by Hahn Shin
1995	$1.860 billion	$2.195 billion	85%
1996	$2.160 billion	$2.523 billion	86%
1997	$2.660 billion	$3.024 billion	88%

(P. Choi, 1999)

When it comes to earnings from exporting, Table 4-9 and Table 4-11 provide a significant comparison between the earnings from subcontracting and those from the domestic animation exported; Korea earned $115 million from subcontracting (Table 4-9) and also earned $3 billion from domestic animated features (Table 4-11) in 1997. This shows that the Korean animation industry is moving rapidly toward domestic animation along with the growth of subcontracting. This is a high level of earnings in

just the four years since 1994 when the first domestic adult animation "Blue Seagull" was released.

Economic Status and Market Size of the Animation Industry

The industry is now considered as a manufacturing industry, which has enabled the industry to enjoy a twenty percent tax break. It had been a service industry until 1995. "Armageddon" (1996) was the first animated feature that was categorized as a manufacturing product. In addition, the industry was suffering from financial shortages for the production of animated features. However, since "Armageddon," the industry started to have financial consortia to make domestic production much easier and secure in the market than before. With "Armageddon," the industry also learned to have professional animation production agents to organize planning, funding, promotion and distribution as well as selecting proper production studios. Then, the investors can invest according to the ability of each agent, not according to the total requirements of the animation itself. With the investment, the agents can go further to develop domestic and foreign markets more systematically (H. Kim, 1996, pp. 48-49).

In regard to market size with spin-off products, the Korean cartoon market amounts to 1.5 trillion Won ($1.875 billion) according to the Ministry of Culture and Sports. If one includes the black market illegal copies it amounted to 3.41 trillion Won ($4.2625 billion) in 1995 ("Issue," 1997), while the market was estimated at 3.005 trillion Won ($3.7656 billion) according to Changwan Han (1995b; see Table 4-12). The total went up to seven trillion Won ($8.75 billion) in 1997, while the global

market reached about 1,500 trillion Won ($1.875 trillion) ("Issue," 1997). Especially, the Korean animation earned 300 billion Won ($375 million) in the domestic cartoon market. The general animation market, however, is divided into Japanese animation (eighty five percent), American animation (eight percent), and Korean animation (five percent) (Oh, 1996).

Table 4-12. The Korean Cartoon Market Size Including the Black Market

Kind of Market	**Market Size**
Comic book rental store	50 billion Won ($62.5 million)
Comic book sales	150 billion Won ($187.5 million)
Comic magazine	200 billion Won ($250 million)
Sports newspaper comics	5 billion Won ($6.25 million)
Subtotal of Comics Market	405 billion Won ($506.25 million)
Animation (feature, video, television)	700 billion Won ($875 million)
Character Merchandising	1 trillion Won ($1.25 billion)
Music Records	200 billion Won ($250 million)
Electric Games	400 billion Won ($500 million)
Theme Park	300 billion Won ($375 million)
Total	3.005 trillion Won ($3.7656 billion)

(C. Han, 1995b, p. 153)

In terms of the comic publication markets, the estimation reached about 400 billion Won ($500 million) in 1995, and the character merchandising market was positioned as the largest market at one trillion Won ($1.25 billion). If black market is

included, the market of video animation, television animation, and animated features in total is 700 billion Won ($875 million) (C. Han, 1995b, p. 153; see Table 4-12).

Table 4-13. Expenses of "Armageddon" (1996)

	Net Cost	Promotion & General Management	Interest Paid & Extra Cost	Total
Amount (Won)	1,255 million ($1,568,750)	1,208 million ($1,510,000)	40 million ($50,000)	2,503 million ($3,128,750)
Portion	50.1%	48.3%	1.6%	100%

(J. Kim, 1996b, pp. 88-89)

In terms of box office revenue, the production cost of animated features has not been fully recovered in theaters (see Table 4-13). In the case of "Armageddon" (1996), the production cost was 2.5 billion Won ($3.1 million), while the box office income (see Table 4-14) was just 374 million Won ($467,500), which made a difference of 2.13 billion Won ($2.7 million).

In the light of the total income of 1.4 billion Won ($1.7 million), "Armageddon" failed to recover its total production cost at the box office. However, there still remains possibilities for export and re-release afterwards.

Table 4-14. Income of "Armageddon" (1996). (unit: million Won)

	Box Office Income	License Income	Character Income	Interest Income	Extra	Total
Won	374 ($467,500)	604 ($755,000)	298 ($372,500)	93 ($116,250)	18 ($22,500)	1,387 ($1,733,750)
Portion	27%	43.5%	21.5%	6.7%	1.3%	100%

(J. Kim, 1996b, pp. 88-89)

The theater admission ticket price for a movie is usually 5,000 Won ($6.25) in Korea. From the 5,000 Won 1,000 Won ($1.25) is extracted for the various taxes and the remainder 4,000 Won ($5.00) is evenly divided between the theater owner and the movie owner. Thus, 2,000 ($2.50) Won is the final net income given to animation producer from an admission ticket (Yun, 1995, p. 45). According to this calculation, the number of viewers of "Armageddon" had to be 187,000 people. Finally, "Armageddon" needed more than 600,000 viewers, which would make the amount of 2.4 billion Won. This would recover the full production cost.

According to Table 4-15, the most popular animated feature in the recent years (1994-1997) was "Blue Seagull" (1994), drawing 500,000 viewers to theaters. On the other hand, comparison of the domestic and the imported foreign animation makes a considerable difference in terms of the number of viewers and income revenues from the box office. "The Lion King" drew 1,200,000 viewers in 1994. The lowest number

of viewers was 433,309 for "Little Mermaid" in 1992 (Table 4-16). The American animated feature has had 752,661 viewers on average, while Korean animated features had just 202,429 viewers on average. This shows that Korean animated features are not satisfying the Korean viewers, while the imported American animation is successful in Korea.

Table 4-15. Number of Viewers of Korean Animated Features

Korean Animated Feature	Number of Viewers
Blue Seagull (1994)	500,000
The Return of Hong Gil Dong (1995)	300,000[31]
Armageddon (1996)	187,000
Agi Gongryong Dooli (1996)	250,000
Nanjungilgi (1997)	40,000
Euijeok Imggeokjeong (1997)	40,000
Jeonsa Ryan (1997)	100,000
Average	202,429

("Hanguk Animaiton Geungan," 1997; "Animation Yeongwhasijang," 1997; J. Kim, 1996b; "AWN," 1997d).

[31] The Korean Central Daily News Magazine (1997) roughly reported that the number of viewers were 100,000 through 300,000. This dissertation adopts the higher number.

Table 4-16. Number of Viewers of American Animated Features in Korea

American Animated Feature	**Number of viewers**
Little Mermaid (1992)	433,309
Beauty and the Beast (1992)	750,000[32]
Aladdin (1993)	900,000[33]
Lion King (1994)	1,200,000
Hunchback of Notre Dame (1996)	4,600,000
Hercules (1997)	480,000
Average Total	752,661

(Rho, 1995; C. Han, 1995b; "Animation Yeongwhasijang,"1997, "Yeoreum," 1996)

In terms of the spin-off products market, the Korean government (Oh, 1996), estimated that the Korean character market is about 200 billion Won ($250 million) in 1995 and expected to be 5,000 billion Won ($6.25 billion) by 2000 (p. 268). In fact, the Korean character market reached 1.2 trillion Won ($1.5 billion)[34] in 1997. However, eighty percent of the market was peopled by foreign cartoon characters in 1997 (S.C. Yu, 1997), and ninety percent in 1998 (S.Y. Park, 1998, p. 81). In 1991, for example, "Batman" characters made 1 billion Won ($1,250 million), "Dragon

[32] The Korean Central Daily News Magazine (1997) reported that "Beauty and the Beast" achieved 750,000 viewers, while the others reported that 590,000 viewers watched the animation (C. Han, 1995; Rho, 1995). This dissertation takes the most recent report of the magazine.

[33] According to the Korean Central Daily News Magazine (1997), the number of viewers was 900,000. It was also 750,000 viewers according to Changwan Han (1995b), and 647,266 according to Gwangwoo Rho (1995). The dissertation accepts the most recent report in the magazine.

Ball" made 400 million Won ($500 thousand), and "Snoopy" earned 500 million Won ($625 thousand). However, "Dooly" the most popular cartoon character in Korea made just 350 million Won ($437,500) in ten years ("Manwhasijang 2," 1993).

With respect to foreign animation characters, Disney's "Little Mermaid" in 1990 caused Korea to pay close attention to the character market which appeals not only to children but also to adults (J. H. Kim, 1996, pp. 226-227). Also, the foreign occupation has been deepened by Korean broadcasting companies that have been interested in importing foreign animation in association with its character license rights. Sometimes the animation characters are merchandised even before broadcasting the production (H. Kim, 1997).

Merchandising Korean animation characters is mostly dependent upon television animation which usually has a life cycle of two weeks or two months at the longest after the animation ends on the air ("SBSga Yeoreogal," 1996, p. 36). In addition, pre-testing of the character markets and promotional skills are not mature enough in Korea. In this situation, the export of Korean character products to overseas markets has not been conceivable (C. Han, 1995b, p. 121). Historically, the inactive production of Korea's domestic television animation and the unsuccessful animated features have made it difficult for the industry to establish a solid character market in Korea. As a result, a short term-animation run cannot create an attractive market while Disney's

---

[34] According to the Ministry of Culture and Tourism (formerly Ministry of Culture and Sports) the market size is 200 billion Won ($250 million) without consideration of black market (S. Y. Park, 1998, pp. 80-81).

Mickey Mouse has been shown since 1920 and the characters are loved because of their longevity (Yun, 1995, p. 70).

Cartoon characters are also applied to electric game software, which is another form of commercial modification of the cartoon characters. The game software market is a secure market in that the characters in the games are already confirmed in their popularity through cartoons.

Table 4-17 . Market Size of the Korean and Overseas Electric Games in 1994

	Domestic	**Overseas**
PC Games (Software)	30 billion Won ($37.5 million)	$5 billion
Video Games (Software & Hardware)	80 billion Won ($100 million)	$45 billion
Total	110 billion Won ($137.5 million)	$50 billion

(C. Han, 1995b, p. 113)

The Korean electric game industry started in the early 1980s. "Entertaining rooms" appeared with Japanese game software. The very first game machine in Korea was Daiwoo company's Zemix in 1986. It was unsuccessful in the market. Later, Hyundai and the Samsung company were involved in the market, directly importing software from Nintendo and Sega, respectively, and assembling the hardware parts of the Japanese game machines in Korea (Yun, 1995, p. 66). In 1994, the Korean game industry recorded the market size as $137.5 million including $37.5 million for

personal computer game software and $100 million for the software and hardware for video games (C. Han, 1995b, p. 113).

On the other hand, comics and animation are applied to theme parks, such as Disneyland. In Korea, theme parks were getting attention in the 1980s. In Seoul and its suburban areas, Dream Land was established in 1987, Seoul Land in 1988, and Lotte World in 1989 (C. Han, 1995b, p. 136). These entertainment parks are combined with shopping centers, sports gyms, hotels, animal zoos, and art museums.

Korean domestic animation, however, is not strong enough yet to be the main attraction in the parks. In the case of Disneyland, it is divided into four sectors: Adventure, Fantasy, Frontier, and Tomorrow. Among the four different sections, seventy percent of the revenue of Disneyland comes from the fantasy world of animation (C. Han, 1995b, p. 30). In addition, Disney's animation also seems to strategically employ synergetic effects at its theme parks. "Lion King," for example, fits the world of adventure, "Pocahontas" the world of Western pioneers.

The Import of Foreign Animation

The Korean television stations made about one million dollars in their exports in 1997, but they still import around five million dollars (see Table 4-18). Even though television stations produced their own and co-produced animation, television animation is still seriously dependent upon imported works.

Table 4-18. Export and Import of Television Programs in Korea

	1996	1997
Export	$ 5,966,000	$11,527,000 (animation 10%)
Import	$63,904,000	$57,947,000 (animation 9%)
Import: Export	11:1	5:1

(S. Jin, 1998a)

Table 4-19. Animation in the Total Children's TV Programming in Korea (1980-1995)

1 KBS1	KBS2	MBC	SBS
20.1%	35.2%	34.9%	55.6% (since 92)

Especially since 1992, the total average has gone up to 40 percent .

(Korean Broadcasting Commission Report in 1996, as cited in "Jeonwhangi," 1997, p. 38)

Since 1980, according to Table 4-19, Korean television stations have increased their dependence upon animation in their children's programs. SBS is so dependent upon animation that it has carried animation for more than half (55.6 percent) of its total children's programming, and the total average animation in children's television programs has rapidly increased to forty percent, particularly since 1992.

The increasing demand for animation in television programs is thought to stimulate the Korean animation industry to focus on domestic production. On the contrary, however, the economic reality of the growing demand for animation did not work favorably for the domestic animation industry. The stations put the industry

aside, and rather focused on the import of ready-made overseas animation. The Korean Broadcasting Commission reported that the major three stations imported foreign animation for 90.4 percent of their total television animation programs (see Table 4-20). In total, more than eighty percent of broadcast animation was overseas animation from 1980 to 1995. Even though the first Korean television animation was produced in 1987, Korean television stations were dependent upon overseas animation from the beginning, and it is revealing that the stations have not been enthusiastically involved in producing domestic animation.

Table 4-20. Foreign TV Animation in Children's Animation Programs (1980-1995)

MBC	SBS	KBS2	KBS1	Average
97.7%	94.6%	88.6%	80.8%	90.4%

(Korean Broadcasting Commission report in 1996 as cited in "Jeonwhangi," 1997, p. 38).

Table 4-21. Foreign TV Animation by Country (1980-1995).

USA	Japan	Europe	Etc.
48.1%	35.9%	5.1%	10.9%

(Korean Broadcasting Commission report in 1996 as cited in "Jeonwhangi," 1997, p. 38).

Specifically, the import of foreign animation is concentrated on two countries, Japan and the USA. Table 4-21 points out that American animation has held the lead position in Korea's imported foreign animation for fifteen years (48.1 percent). However, the import of Japanese animation has increased and took 61.1 percent in the

imported overseas animation in Korea in 1996, in particular, while American animation just took 20.1 percent (Table 4-22).

Table 4-22. Foreign TV Animation by Station in 1996 (unit: show)

	KBS	MBC	SBS	EBS	Total
Japan	331 (68.7%)	284 (69.6%)	249 (60.7%)	8 (6.2%)	872 (61.1%)
USA	130 (27.0%)	21 (5.1%)	136 (33.2%)	-	287 (20.1%)
France	16 (3.3%)	85 (20.8%)	22 (5.4%)	7 (5.5%)	130 (9.1%)
Others	5 (1.0%)	18 (4.4%)	3 (0.7%)	113 (88.3%)	139 (9.7%)
Total	482	408	410	128	1428

(Y. Yi, 1997, p. 95)

What is interesting in this report is that Korea, as the third largest producer of animation worldwide, has structured its industry on the needs of overseas clients, rather than on its domestic market. From eighty percent to ninety percent of television animation has been imported, which means that Korean television stations as major animation consumers have not contributed to the development of domestic animation. Even an animation cable station established in 1995 started with a heavy reliance upon Japanese animation, violating the thirty percent limit the government placed on the use of foreign animation.

The dependence on foreign animation results in small budgets for animation production and the Korean subcontractors' inability or unwillingness to provide enough labor and time for domestic animation production.

The low budget for animation is closely related to the unique advertising system in Korea and to the relatively high production cost compared to live action television dramas. The stations' major income source is advertising. The advertising price of each broadcasting time zone is determined by the state-run Korean Broadcasting Advertising Company (KOBACO)[35]. The advertising cost of an early evening television spot for animation shows on weekdays amounts to 1.5 million Won ($1,875). An animation series is usually sponsored by ten advertisements, which means fifteen million Won ($18,750) for an animation show. The price is fixed by the KOBACO regardless of the program's popularity. Thus, the stations do not need to compete with one another. This situation leads the stations to increase advertising revenues by lowering the program production costs (Rho, 1995, p. 67).

According to Table 4-23, the production cost of a ninety-minute animation show ranges from 150 million Won ($187,500) to 400 million Won ($500,000) except "Gongjajeon" which cost 120 million Won ($1.4 million) in association with foreign partners. However, the production of a live action drama costs twenty million Won ($25,000) through twenty five million Won ($31,250)[36] (Yun, 1995, p. 44).

---

[35] KOBACO was formed to control an advertising industry as the Fifth Republic government decided to reorganize the TV broadcasting system from a commercial system to public broadcasting system in 1980. The major role of KOBACO was to supervise broadcast advertising that was already monopolized by the state. KOBACO was given the authority to bestow accreditation on advertising agencies (Yun, 1994, pp. 204-205).

[36] According to KBS (1994, as cited in Yun, 1995, p. 43), its production cost of an hour piece of live action drama amounted to 22.45 million Won ($28,062) in 1992. Thus, a ninety minute drama would costs 33.675 million Won ($42,093).

Accordingly, a ninety minute animation show costs from 4.5 to 12 times more than a live action drama show. In this sense, it is natural that the Korean broadcasting stations are reluctant to produce their own animation.

Table 4-23. Production Cost of Korean TV Animation

Station	Title	Year	Production Cost (Won)
MBC	Bidulgi Hapchang (90 min)	1988	149,803,470 ($187,253)
	Taegwondongja Maruchi(80 min)	1988	153,816,500 ($192,270)
	Dodani (80 min)	1989	155,900,600 ($194,876)
	Meoteol Dosa (80 min)	1989	155,900,600 ($194,876)
	Meoteoldosawa 108 Yogoe (80min)	1990	167,470,000 ($209,338)
	Meoteoldosawa Ttomae (80 min)	1990	207,412,800 ($259,265)
	Yojeong Pink (80 min)	1991	180,000,000 ($225,000)
	Penking Liking (30 min X 26)	1993	2,080,000,000 ($2,600,000) 80,000,000 ($100,000)/show
KBS	Mugungi-e Miraeyeohaeng (75 min)	1995	134,250,000 ($167,813)
	Gongjajeon (90 min)	1995	1,120,000,000 ($1,400,000)
	Agigongryong Dooli II (20 min X 13)	1988	325,000,000 ($406,250) 25,000,000 ($31,250)/show
	Cheonbangjichuk Hanny (30 min X 3)	1989	75,000,000 ($93,750) 25,000,000 ($31,250)/show
	Tteodori Kkachi (30 min X3)	1987	75,000,000 ($93,750) 25,000,000 ($31,250)
SBS	Naeireun Worldcup (90 min)	1996	409,946,000 ($512,433)
	Bitdorie Uju2malli (25 min X 26)	1993	7,800,000,000 ($9,750,000) 300,000,000 ($375,000)/show

("SBSga," 1996, p. 36)

On the other hand, when it comes to the purchase price of foreign animation, the television stations' choice to import seems reasonable and fair. According to Table 4-23, a thirty-minute animation show costs twenty five million Won ($31,250) to eighty million Won ($100,000) for its production, while Korea pays $1,000 for a thirty-minute television animation show (The Hollywood Reporter MIP-TV Special Issue, 1997, as cited in D. Kim, 1997). Accordingly, the production of a thirty-minute animation show costs 31 to 100 times more than the import of a thirty-minute foreign animation show, which is enough for the stations to prefer to import overseas animation.

In the case of KBS, its program production costs amounted to 240 billion Won ($300 million) of its total annual budget of 640 billion Won ($800 million) in 1995. Particularly for animation, KBS spent about six billion Won ($7.5 million) in eight years from 1987 to 1995. The yearly average expenditure for animation amounts to only 750 million Won ($937,500), which is just three percent of the total program production cost in 1995. The yearly budget of $937,500 for animation production in KBS is even less than a twenty-minute show of "The Simpsons" which costs more than $1 million. In addition, KBS has only one program director for animation, who is in charge of subtitling, dubbing, sound effects, special effects, and other factors of animation broadcast ("Changrip," 1996, p. 31).

Since 1995, however, KBS and MBC have both been striving to support domestic animation production. They jointly supported the Seoul International Cartoon and Animation Festival (SICAF) in 1995. In particular, MBC itself sponsored another

international animation festival, Anim Expo in 1997. Finally, the television stations started to grasp the commercial possibilities not only of advertising but also of video licensing and merchandising of characters. Thus, they became enthusiastic in producing domestic animation and financially supporting domestic production companies

According to the Vision 2001 Project of KBS, the station projects itself as a professional total visual production company with an emphasis on animation ("Changrip," 1996, p. 33; "KBS-MBC," 1996). Meanwhile, MBC formed an animation team which was composed of four professional animation production directors. MBC has invested one billion Won ($1.25 million) annually in its animation budget, which has been mostly used for import. However, the station raised its budget to 1.3 billion Won ($1.625 million) for the production of domestic animation ("Jeonwhangi," 1997, p. 39).

Within this small budget, the television stations have been particularly inclined to Japanese animation which is cheaper than American animation as in Table 4-21. Japanese animation usually adopts a limited animation method which needs 14,000 pictures or even 5,000 pictures for a thirty-minute animation, while American animation puts about 20,000 different pictures for a full animation of thirty minutes ("Animation Terminology," 1997, p. 107).

The Export of Domestic Television Animation

Since the first domestic television animation in 1987, Korean television stations also sold their animation to overseas countries. KBS for the first time brought its animation to the world's largest television program exposition, MIP-TV in Cannes, France, and exported three different shows to Europe and Middle Eastern countries in 1988. This export of animation was the first export of KBS' television programs in a real sense. In fact, KBS has attended the international exposition since 1977, but it has concentrated on purchasing overseas programs during those ten years. KBS has not made programs according to international taste. Instead, it has only focused on the domestic market. In addition, KBS did not have professionals to handle exporting (S. Kim, 1997, p. 59).

KBS has exported $1.6 million of animation for the six years since 1991 (Table 4-24). When KBS' export amount of $378,200 is compared to Japan's animation export, which was $120 million in 1996 (Kuroso, 1997, p. 16), there is a great discrepancy in the amount. On average, for six years, KBS was paid $2,250 per a thirty minute show and $6,750 for a ninety minute show for its exported animation, while it earned just $735 for a thirty minute show and $2,204 for a ninety minute show.

Table 4-24. Export of KBS Animation

Year	Minutes	Price (US $)	Country
1991	910	678,000[37]	USA (CUBIC), Jordan (MEDIA)
1992	4,680	125,500	China, Poland (D.G. Film), Thailand (Intel Co.)
1993	5,039	117,740[38]	Hong Kong (WHARF Cable), Singapore (SBC), Turkey (TRT)
1994	3,765	92,200	Jordan (Al Qabas, MM), Indonesia, China,
1995	4,345	218,700	Turkey (TRT), Taiwan (Line Up, Keizer), France (4D TV)
1996	2,610	378,200	Germany (Taurus Film), Turkey (TRT), Singapore (NDF)
Total	21,349	1,610,340	$75 / min $2,250 / 30 min $6,750 / 90 min

(S. Kim, 1997, p. 60)

On the other hand, MBC also strove to expand exporting its programs by establishing MBC Productions in 1991. Just two years later in 1993, MBC exported $2,381,810, while KBS achieved $117,740 and SBS reached $9,850 in their export of animation. Interestingly, "Ggumdori" (twenty six shows of thirty minutes each) alone made $2,280,000 in its exports. The animation was co-produced with Calico and distributed by Zodiac in America. In particular, the animation was even sold to France at $10,500 per unit of the series, which was much more than the KBS average export of $2,250 for a thirty minute series show (Yun, 1995, pp. 54-55).

[37] According to the Broadcasting Producers Association of Korea (1994), KBS exported $711,000 in 1991.

Involvement of the Korean Conglomerates

One of the most interesting points in the Korean animation industry is that industrial conglomerates began to be interested in animation in 1995, when the Dongyang group established Tooniverse which is the cable television channel exclusively devoted to animation. In an effort to involve themselves in the industry, the conglomerates became financial supporters not only for domestic animation, but also for overseas animation. The conglomerates realized the commercial attractiveness and became supporters of animation with television stations.

Table 4-25. Business Plan of DreamWorks SKG (1995-2004)

Products	Input Cost	Specific Plans
Movies	$8.68 billion	69 shows
Animation	$3.534 billion	6 shows
TV programs	$2.386 billion	59 shows in association with ABC
Audio products	$1.315 billion	143 titles in association with MCA
Total	$15.915 billion	

("DreamWorks SKG," 1995, p. 21)

Samsung is the most active conglomerate in the Korean animation industry. The Cheil Jedang Company of Samsung formed CJ Entertainment and invested $300 million in April 1995 for DreamWorks SKG, which was established by Steven Spielberg, Jeffrey Katzenberg, and David Geffen with a start-up fund of $1 billion in

[38] According to the Korean Broadcasting Institute (1994), KBS made $141,140 in 1993.

1994. The DreamWorks SKG planned to produce audio and visual products totaling $16 billion by 2004 (Table 4-25).

Figure 4-10 "Alexander's War Chronicles" (1997).
© 1998 ALEXANDER COMMITTEE
(http://www.ani-alexander.com/image-4/screen-shot/b3.jpg)

In addition, CJ Entertainment of Samsung made a contract with Golden Harvest of USA and Golden Village of Australia in 1996 to share distribution rights of visual products in the Asian region excluding Japan. CJ Entertainment also established a contract with MBC for character merchandising on behalf of MCA in the USA ("Cheil Jedang," 1997). Furthermore, Samsung Yeongsangsaeopdan (Samsung Visual Business Company) planned to make six television animations. Its first and purely

domestic animation "Bio Cop Wingo" (twenty six shows of thirty minutes each) was released in April 1998, and the others will be co-produced with overseas partners. For instance, "Alexander's War Chronicles" (thirteen shows of thirty minutes each) was made in association with Japan ("AWN," 1997c, p. 8). Samsung also paid its business attention to overseas animation production. It invested $20 million in the production of the Japanese animation "Adventures of Turon" of Bandai Company and the Triangle Company in Japan ("Geupbyeon," 1997, p. 55).

Figure 4-11. "Bio Cop Wingo" (1998).
(C) 1998 Samsung Entertainment Group
(http://www.samsung.co.kr/wingo/download/three.gif)

Another conglomerate, Ssangyong group, established Cine Dream in association with Morning Glory which is one of the most prestigious character merchandising

companies in Korea. Morning Glory put its own characters in the animation "Jeonsa Ryan" (The Last Warrior) in 1997, which was produced by Cine Dream ("AWN," 1997b, p. 9). The Ssangyong invested two billion Won ($2.5 million) in the animation ("AWN," 1996c, p. 55).

The Kolon group and the television station SBS jointly established Kolon Cartoon Club in January 1997, for which Kolon provides animation and SBS broadcasts it. The revenue from broadcasting is evenly divided. Also, Kolon has the primary rights to the use of characters created by SBS ("Kolon," 1997).

Another company Geumgang Giwhoek is co-producing animation with Dai Won Animation company. Specifically, Geumgang Giwhoek takes charge of marketing and promotion, while the actual production is handled by Daiwon Animation Company, which became an ideal model of co-production in the industry. Further, they jointly participate in the spin-off market of animation, such as game software, character licensing, character shops, the direct distribution of video and animated features, etc. ("Geumgang Giwhoek," 1996).

In addition, even news organizations were involved in the animation market with the conglomerates. The Dong-A Daily Newspaper and the conglomerate Lucky Goldstar (LG) sponsored the Dong-A LG International Festival of Comics and Animation in 1997. The festival is an annual international cartoon festival. The Joongang Daily Newspaper sponsored the Symposium for the "Strategy of Korean Animation for the Future" with the animation cable company Tooniverse in 1997.

Finally, the conglomerate Dongwon group merged with the animation production agent S-MEDICOM Co., Ltd. in November 1995 and made "Jang Bogo, King of the Sea" in 1997, which was also recorded in English. Like Samsung group's CJ Entertainment, Dongwon's S-MEDICOM is associated with American Zen Entertainment and Japanese Image KEI in producing the animation. Zen Entertainment provided the skills for three dimensional animation and the Image KEI handled the international marketing of the animation ("TV Manwha," 1996). S-MEDICOM also became MCA-Universal agent in Korea. S-MEDICOM's "The Legend of the White Whale (Moby Dick)" (twenty six shows of thirty minutes each, 1998) was also made with Sony and Image KEI in Japan. It was aired in NHK. S-MEDICOM has developed its merchandising business. For example, Casper licenses were sold through the company for children's shoes, T-shirts, clothes, socks, stationary, table wear sets, umbrellas, key holders, and so on ("S-MEDICOM," 1999).

Among the conglomerates involved in the animation industry, Samsung is the most active player in the sense that it is associated with the American and Japanese animation producers, as well as with the Korean broadcasting station MBC. Above all, however, the actual connection between the animation production companies and the conglomerates must be instrumental for the growth of domestic animation. Geumgang Giwhoek, in this sense, is the most outstanding player for the industry.

Economic Support of the Korean Government

The recent popularity of Korean domestic animation was made possible, in a large part, by the active economic support of the Korean government. In 1994, there was a meeting of Youngsang Baljeon Mingan Hyeopeuiwhoe (Private Council for the Development of the Visual Industry). The meeting discussed possible ways of developing the Korean visual industry and found to their surprise that ninety eight percent of the exported visual products were subcontracting overseas animation (Sehyeong Park, personal communication, August 12, 1995). Actually, the export of visual products reached $84,088,000 in 1995, of which $83,880,000 was animation. Live-action movies were just $208,000 ("Je2whoe SICAF96," 1996, p. 23)

Even Korean President Youngsam Kim expressed his great interest in the visual industry by inviting Steven Spielberg and Jeffrey Katzenberg to the presidential residence on November 21, 1995. From the government's perspective, it is impressive that the box office earnings of Spielberg's "Jurassic Park" were $868 million in the year after it was released, while its production cost was just $65 million. In particular, $530 million of the $870 million was from abroad ("Scare Bleu," 1993, p. 29 as cited in Kang, 1995, p. 141). Its total income amounted to $1.4 billion including $500 million from its spin-off business, such as the licensing of characters, television broadcasting, and video cassette tapes. With a production cost of $330 million, the net profits of the animation were $1.07 billion (A Report in *Forbes*, October 1994, as cited in Kang, 1995, p. 141).

From the industrial perspective, the earnings of "Jurassic Park" seemed equal to the income from the export of 1.1 million cars of Hyundai's SONATA II V6 ($1,500 is the net profit earned from a car) (Kang, 1995, p. 141). Korea made just 640,000 cars in 1994. As a result, the earnings that Spielberg's animation made for a year are equivalent to the income that Korea made from its selling cars overseas for about two years (C. Han, 1995b; H. Kim, 1996). This is the reason that the authorities decided to foster the Korean animation industry as a strategically important export sector of the economy ("Dangjeong,"1997).

Political and Regulative Support

It did not take long for the government to become physically involved in the comics and animation industry. Most importantly, on January 18, 1995, the Ministry of Culture and Sports announced a "Fertilization Plan of the Animation Industry" whereby on March 15, 1995, the Ministry of Finance, the Ministry of Trade and Industry, and the Tax Ministry agreed to change the status of animation from a "service" to a "manufacturing" industry, enabling animators to receive a twenty percent tax break (C. Han, 1995b, p. 98).[39]

Recently, the government announced a plan to support the animation industry, which wrapped up the previous discussions and thoughts about television animation's "Broadcasting Duty Hours of Domestic Animation." Even though the government had already set the quota of seventy percent for domestic animation duty hours on cable

television in 1995, the broadcasting hours of television animation have not been considered to be regulated. Television animation has belonged to the movie category, in which foreign movies were not allowed to exceed twenty percent of all broadcasting movies (Y. Yi, 1997, p. 93).

Table 4-26. Animation Score Counting System

Considering Items	Points
Originality of ideas	2
Script	2
Model design	2
Storyboard	2
Directing	2
Background set-up	1
Basic design	1
Background drawing	1
Key animation	2
Assistant animation	2
Tracing and coloring	1
Camera work	1
Music	1
Sound effects	1
Voice recording	1
Total	**22**

[39] The general movie industry also enjoyed a change of its industrial category from service to manufacturing in 1996.

However, on July 10, 1998, the Ministry of Culture and Travel[40] confirmed that twenty-five percent (fifty minutes) for the air stations KBS and MBC, and fifteen percent (thirty minutes) for SBS of the animation used must be domestic. The regulation was effective in October 1998. In addition, the government will set a 100-minute quota for all of the stations by 2001 ("Hanguk Animation Saneobi," 1998, pp. 60-61). This regulation aimed at the development of the domestic animation industry by forcing television stations as the major client of the industry to contribute to the production of domestic animation.

In addition, the government will enact the so called "Score Counting System" which will give the industry a future domesticity standard (see Table 4-25). Animation with sixteen points out of twenty two will be regarded as domestic animation. If animation was co-produced with foreign partners, at least thirteen points and thirty percent of the total production cost must be domestic in order to be considered domestic animation.

The broadcasting companies unanimously presented negative opinions about the regulation. An October production date was too early because they did not have enough new domestic animation to broadcast. They complained that they would have to rebroadcast for a period. Re-broadcasting the old animation would lessen viewer interest in Korean animation. Also, due to the national economic crisis starting in the middle of 1998, the television stations' incomes from advertising decreased

---

[40] In the Seventh Republic started in 1997, the Ministry of Culture and Sports changed to the Ministry of Culture and Travel.

considerably. Actually, The advertising revenues of stations has already been reduced to half of the usual revenue according to one report ("Hanguk Animation Saneobi," 1998b, p. 63).

With respect to co-production with overseas partners, a twenty-five- or thirty-minute show of a series costs between $375,000 and $162,500 (Table 4-26). Thirty percent of the cost will range from $48,750 to $112,500, which exceeds the $31,250 production cost of a piece of domestic animation with the same time length.

4-27. Production Cost of International Co-production and Domestic Production

	Title	**Total Cost**	**Cost per Piece**
International Co-production	Widget (KBS) (30 min X 65)	16.5 billion Won ($20.625 million)	250 million Won ($312,500)
	Ggumdori (MBC) (30 min X 26)	3.4 billion Won ($4.35 million)	130 million Won ($162,500)
	Bitdori Uju2malli (25 min X 26)	7.8 billion Won ($9.75 million)	300 million Won ($375,000)
Domestic Production	Agigongryong Dooli II (KBS) (20 min X 13)	325 million Won ($406,250)	25 million Won ($31,250)
	Cheonbang Jichuk Hanny (KBS) (30 min X 130)	325 million Won ($406,250)	25 million Won ($31,250)

Financial Support fro the Government

In May 1998, the Korean government announced that its 1999 budget would provide 46.1 billion Won ($57.6 million) to support the general cultural industry in Korea in 1999. In particular, ten billion Won ($12.5 million) of the budget was allocated for movie development. The ten-billion Won will be a part of fifty billion Won ($62.5 million) for movie industry by 2005. In addition, the government will establish an Animation Development Committee and provide 1.6 billion Won ($2 million) for the production center of animation, while 13.4 billion Won ($16.75 million) of the budget was put for the electric game industry in 1999 (N. Shin, N., et al., 1998, p. 52; "Yesan: Munwhasaneop," 1998).

In addition, in 1998, the Ministry of Culture and Travel (formerly the Ministry of Culture and Sport) announced support of twenty percent of the broadcasting stations' total production costs. The fund will be provided by the state-run KOBACO and the Korean Broadcasting Committee. The Ministry also planned to provide an "Animation Supporting Center" in the Seoul General Movie Shooting Center in 1997, and ten billion Won (12.5 million dollars) would be provided for the center.

On the other hand, The Ministry of Culture and Sports' "Fertilization Plan for the Animation Industry" in 1995 also pledged to organize and support an annual international cartoon and animation festival. As a result, the Seoul International Cartoon and Animation Festival (SICAF) has been held annually since 1995.

The Ministry of Culture and Sports also began to involve itself in Hanguk Manwha Munwha Daesang Mit Game Daesang (Korean Cartoon Culture Prize and

Game Software Prize) in December 1995. The competition has been only for cartoons since 1991, but the Ministry included the game software competition in 1995 ("AWN," 1997d, p. 10).

Building the Infrastructure

The Korean government is making serious efforts to build the infrastructure of the animation industry. The governmental models for supporting the animation industry are the Centre National de la Cinematographie (CNC) of France, The Canadian National Film Board, and The Children's Television Foundation in Australia (Oh, 1996, p. 271; "Segye-e Eorini," 1996, p. 14).

The Korean government is now preparing to take advantage of the business opportunities in the World Cup soccer games in Korea and Japan in 2002. The government plans to create a cultural infrastructure on the streets around the main stadium, called the "Jayuro Cultural Arts Belt."[41] The highlight of the plan is the Publishing and Information Industry Complex which will be completed by 2001 in the Paju area. The complex will be furnished with animation and comics production studios, visual production equipment as well as publishing and printing companies (J. Park, 1998).

Furthermore, in December 1997, the Korean government designated six regions as "Techno Park Complexes" to be constructed, which will include an information and communication research center, a business support center, a theme park (amusement

[41] Jayuro is the name of the main street of the area.

park) like Disneyland, visual art colleges and high schools, a library of visual resources, etc. (S. Y. Park, 1998, p. 61). Animation production will be the center of the industrial complex.

Iin 1997, the government launched a Cartoon and Animation Department at the National Institute of Visual Arts (Gukrip Youngsangwon) in the Korean National Conservatory of Arts, becoming the fourth four-year university level department after Sangmyung University, Sejong University, and Hanseo University. The government already established a cartoon art department at Kongju National Junior College in 1990.

In terms of the game industry, the government plans to establish a general support center for the game industry in Seoul in 1999, while the Yongsan area in Seoul, where computer and communication software and its business are gathered together, is going to be the so called "Korean Silicon Valley" ("Seoul-e Game Center," 1998). In addition, the government plans to help provide computer game-related classes in the Korean National Conservatory of Arts ("AWN," 1997b, p. 14).

The government is also trying to establish animation and comics information and production centers in the cities of Seoul, Puchon, and Chunchon. These information and production centers cost ten billion Won ($12.5 million) in total and the government pledged to provide 4.4 billion Won ($5.5 million), while remainder will be undertaken by the city governments ("Munwha Sesang: Animation," 1999).

Among these three centers, The Seoul Animation Center opened its door to the industry in April 1999. What is especially interesting about the center is that it was the

first fruit of the support of the Seoul Industry Development Foundation. Also, the important cartoon organizations such as The Korean Animation Academy, The Korean Cartoonists Association, ASIFA-Korea, The Korean Animation Producers Association, and The Coalition for Development of Our Cartoons, gathered together in the center so that they may have better communicaiton and cooperation ("Munwha Sesang: 4wol," 1999).

Local City Governments' Interests in Animation

It is also interesting to look at the local city governments' enthusiastic involvement in animation as a major future industry. The Chunchon City government supported the venture capital company Jeonju Multi Media and annually held the Anitown Festival in order to draw the central government's national Media Valley project which would cost three trillion Won ($3.75 billion). But, in December 1996, the government decided to exclude Chunchon from its possible cities for the project because Chunchon was found to be inferior in transportation and educational institutes than its rival, Songdo City, near the capital city of Seoul. Even after the government's decision. Chunchon City kept working on the project. It planned to establish a theme park named "Water Land" which will include live-action open movie sets, a cartoon image information center, a multi-media technology supporting center, multi-media arts colleges, and computer education and training centers, as well as general information centers ("Jiyeok Jeongbowha," 1997).

In light of "Anitown," Chunchon City seems to be successful in that fourteen animation studios formed a consortium and moved their headquarters to the city. The consortium was composed of the following four major parts: planning, cel animation production, digital animation, and game software. The city expected more studios in Seoul to move there. With governmental financial help, Chunchon City is constructing a building for the animation studios and companies to come later ("Manwha Yeongwha Jejak," 1997).

"Anitown" will have a cartoon and animation center with a museum, an international exhibition hall, an information center, and the streets of cartoons, etc. by 2001. Basically, Chunchon follows the models of overseas animation cities, such as Annecy in France, Hiroshima in Japan, and Ottawa in Canada. Chunchon City is trying to establish a center of culture, arts, traveling, and high-technology science by 2002. Also, as an active measure, the city established a corporation named Potato to take charge of international marketing for the city's visual industry which will be soon developed (Park et al., 1998, p. 62).

In the meantime, Puchon, a rapidly growing satellite city of the capital city of Seoul, started to show enthusiasm for the visual industry by organizing Puchon International Fantastic Movie Festival in 1997. The city planned to establish a visual products manufacturing complex by 2002, spending 580 billion Won ($725 million). The complex will include animation production studios, game software companies, cartoon character companies, animation colleges and institutions, and so on (Park, et al.,1998, p. 64).

In addition, such cities as Songdo, Cheonan, and Jeonju are also striving to found their local visual industries in association with the central government. Songdo City near Seoul planned to establish a "Media Park" which will include large scale shooting sets and a theme park by 2006 ("Songdo," 1997). Cheonan City was selected to be a city of "Techno Park" by the government in 1997 along with six other cities. "Techno Park" will be an industrial base of the highly advanced technologies, such as communication and information. The city especially focuses on establishing an animation complex, which will have animation production studios. The animation complex will be a business center for exhibition, importing and exporting, and production equipment. Nelson Shin, the CEO of AKOM animation production company was invited to be the chairperson of the planning committee for the animation complex (Park, et al., 1998, p. 62).

Even though the Korean government has supported the animation industry, the industry does not seem to be satisfied with the support. The industry is complaining that the governmental supports are not realistic enough to satisfy the real needs of animation.

For animation, changing from "service" to "manufacturing" is nothing more than opening its doors to loans from banks. In reality, however, because animation is originally a venture business, which requires huge amounts of money for equipment and production, it is still very difficult to get loans from the banks. Even if the industry gets loans from the banks, the industry can not afford the current high interest rates. In the case of the European Union (EU), the organizations supporting animation, such as

Media Projects and the Cartoon Program provide twenty five to fifty percent of the total production cost with no interest. Furthermore, the organizations help the producing companies in promoting and connecting the industry to television stations (N. Shin, 1996b, pp. 82-83; "Animationdeung Youngsang," 1996, p. 33).

However, in terms of the short history of governmental support for Korean animation, the government has made considerable efforts for the industry. Animation festivals on an international scale were not possible without governmental support in the beginning. The festivals drew the public's attention to animation, and that became a sound basis for the development of the domestic animation market. What is most important is that the Korean government helped the animation industry focus on domestic animation production through administrative support.

Now, the Korean government is concentrating on the development of the visual industry. Ironically, however, comics and animation had been regarded as an evil in the society. The government had strictly regulated cartoons in many ways. However, the animation industry as one of the visual industries is drawing the government's strong attention due to the great economic possibilities for the country in the national economic crisis.

It is commonly said that exportation is the only way for the Korean nation to survive. The animation industry is the best fit for survival in the sense that it is a pollution-free and high value added industry. The industry also creates employment. Finally, animation is also animated by the various spin-off products. Animation's enormous business possibilities come from its offspring, such as character

merchandising, game software, music albums, advertising, theme parks, comic book publications, and so on.

Conclusion

The industry has been structured for subcontracting overseas animation, and the structure led the industry to stay in subcontracting production, not in creative production. As a result, the Korean animation industry's pre-production and post-production ability has been underdeveloped. According to Nelson Shin, et al. (1998), the two weakest points in the industry are the short finances for production and the lack of pre- and post-production skills and professionals. That is, the industry has a tenuous basis in terms of planning ability, financial power, and accordingly, its distribution network. Especially in terms of animators, the industry has outstanding key animators, but it does not have enough general directors who can control all of the production steps. (Park & Song, 1996a, p. 139).

Figure 4-12. "Jesus" (1998). © Hahn Shin

Recently, however, the industry has shown that it now has an international level of pre- and post-production capability as well as actual production itself. Peter M. Choi, C.E.O. of Hahn Shin Corporations once argued in a symposium that the industry is now capable of the whole process of making animation ("AWN," 1997b, p. 15). For the Hahn Shin Corporation, the assertion is just because it was recently able to produce its own animated features, "Jesus" (1998). The animation was already sold to foreign countries even before its release. "Jesus" has already made earnings of $1.9 million which almost covers the production costs.

Especially, in terms of outlets for animation, television stations have been the major outlet. Even so, animation was not employed by the stations in an effective way until a cable channel for animation emerged in 1995. In addition, the stations also have played a role as distribution agents for the domestic video market, while there have been no professional distribution agents in Korea (Rho, 1995, pp. 66-67). Furthermore, a more serious problem is that theater owners and other distribution agents are not confident of the future success of domestic animation because of the high popularity of established overseas animation, such as Disney's animation (W. H. Yi, 1996, p. 314).

In addition, the television stations as major consumers and, thus, supposedly major supporters of animation, have been inactive in producing their own animation because production costs a lot more than importing it. As a result, the domestic animation market did not have the chance to become mature enough in a real sense. The Korean animation market is between animated features and television animation, which means

that the original video animation (OVA) market is still undeveloped. However, Japan has enjoyed the success of OVA which made the Japanese animation industry wide enough to develop new ideas and skills (N. Shin, et al., 1998, p. 56).

As a result, the Korean animation industry has long been neglecting the development of domestic production, while it has concentrated on overseas subcontracting. Ironically, however, when the industry began to transfer its subcontracting to the other Asian countries where labor is cheaper, this pushed the industry into the creation of its own animation, which made $3 billion, while international subcontracting earned just $115 million in 1997. In addition, the participation of the industrial conglomerates in the animation industry provided the industry with a way to get potent financial patrons and also efficient channels for national and international distribution.

Korea, in an economic sense, is semi-periphery in the world economic system in the sense that it has skills but not enough finances to invest in its own animation. Accordingly, Korea now needs international cooperation for finance on the basis of the animation production know-how acquired from subcontracting for forty years.

CHAPTER 5

CULTURAL ASPECTS OF THE KOREAN ANIMATION INDUSTRY

Introduction

From the perspective of cultural or media imperialism, a country's culture is affected by what and how much it produces and consumes. The historical and economic examination of Korean animation in the previous chapters found that the Korean animation industry has concentrated on producing other countries' animation, at the same time that the Korean market has heavily consumed other countries' cartoons. Such involvement in overseas production and consumption is the historical and economic result of the international division of animation labor and the immature domestic animation market. As a consequence, the production and the consumption of overseas animation have driven the Korean industry to internalize client countries' production skills and allowed the Korean people to be satisfied with and to become dependent upon global tastes in animation. Therefore, the industry, after forty years of subcontracting, finds itself in the position that it has to make animation that primarily meets global tastes for both the domestic market and the overseas market.

Culturally, however, the industry does not automatically show a direct cultural dependence upon the countries that dominate the world of animation. The development of the animation industry in Korea, as a peripheral Third World country in the beginning of its subcontracting days in the late 1950s and the early 1960s, represents not only technological development but also cultural subjugation to and

integration with the First World countries that are Korea's overseas clients. In reality, the Korean animation industry's efforts have been not only imitative, but also creative.

In this context, the cultural implications of global production of animation will be explored with respect to subcontracting as a disruption of the creative process. Also, the cultural implications of the consumption of imported and illegal copies of foreign cartoons will be examined in terms of cultural identity. In addition, the cultural policy of the Korean government toward Korean cartoons will be also examined to reveal the origin of the cultural mixtures with overseas countries.

Cultural Simulation in Korean Animation

Simulated Homogenization of Culture in Korean Animation

The Korean animation industry has been taught by overseas supervisors who are sent by the client, and normally at his expense, to work with the subcontractors. The supervisor most often is an artist (layout animator, designer, or even a director), but he or she could also be a production manager. The first Westerners who went to Asia were all very versatile artists who worked with the local staff acting as instructors as much as client watchdogs. These early supervisors helped the Korean studios to speed up the learning curve, enabling them to understand quickly how to produce acceptable work for the Western market (Vallas, 1997, pp. 3-4).

From the viewpoint of the Korean subcontractors, subcontracting is a creation of Korean animators. Even though they follow the continuities (contis) and layouts sent by the overseas clients, the actual drawings and their arrangement are restructured in

the process of key animation. Key animators should be able to draw effectively according to the directions and also to draw pictures that the assistant animators can follow easily (Park and Song, 1996a, p.147).

In terms of the rising co-production through financial and technical association, the opportunities to be simulated with the cultural codes of the co-producing countries are also increasing. According to the French animation expert, President Christian Davin (1997) of ALPHANIM company, animators nowadays travel easily for co-production and soon it will not make a difference whether the program is actually made in Europe or in the USA (p. 92).

During the Korean animation renaissance of the 1990s, however, the animation industry had to choose technical association with overseas studios to ensure the quality required by the domestic market. Criticisms of the coarse quality of "Blue Seagull" (1994), were serious enough to cause public disappointment with domestic animation, even though its sensual appeal made the film a success at the box office. Therefore, animated features in 1995 such as "The Return of Hong Gil Dong," "Red Hawk," and "Hungry Best Five" were made in technical association with foreign animation production companies.

Figure 5-1. Close-up of "Hong Gil Dong" (1967).
("Shin Dong Hun Gamdok," 1997, p. 167)

Figure 5-2. Close-up of "The Return of Hong Gil Dong" (1995).
(Poster of "The Return of Hong Gil Dong)

In the case of "Hong Gil Dong Returned" (1995), its associate producers were Tohru Miura and Shoichi Kumabe of "Tenchimuyo" and its directing supervisor was Yamauuchi Shigeyasu of "Dragon Ball Z" ("Hong Gil Dong Returned" poster, 1995). According to Dongheon Shin (personal communication, August 15, 1995), who participated in the production in the beginning as an original creator, the Korean producer decided to send the work to Japan because the Korean audience was already accustomed to Japanese animation and the producer needed to use the international distribution channels that the Japanese animation studios had already established. But, this collaboration led to the criticisms that the animated characters were too Japanese and the story was not much different from that of Toei Animation's "Dragon Ball Z."

In short, "The Return of Hong Gil Dong" was criticized for its strong Japanese flavor. A comparison of the main character from this 1995 feature and its 1967 predecessor, "Hong Gil Dong" reveals some major differences. The 1995 film featured a main character with a sharp chin, big eyes, and thick eyebrows, all indicative of a Japanese influence (see illustrations), causing some critics to lampoon "The Return of Hong Gil Dong" as "Samurai Hong Gil Dong" (N. Shin, 1996c, p. 80). Yonggwan Yi (1996) even insisted that Korea should not have produced "The Return of Hong Gil Dong," because the original Korean mountain became Fuji mountain, and the houses, the temples, and even the style of martial art were not Korean, but Japanese, which are "distortions and lies." Ironically, the film won the grand prize in the first Korean Visual Arts Contest sponsored by the Ministry of Culture and Sports in 1995 ("Hanguk Animation Geungan," 1997, p. 167).

The label "Samurai Hong Gil Dong" is a case of simulation through the implosion of Korean and Japanese tastes in animation. This is an example of intermixing two countries' cultures in animation. The animated characters seem to be Korean, but they are mere transvestisms, the placement of Korean costumes on the bodies of Japanese figures.

"Red Hawk," made in association with Toei Animation, was also often critically compared with the Japanese animation "Dragon Ball Z" ("Hanguk Animation Geungan," 1997, p. 165). Furthermore, "Hungry Best 5" was regarded as very similar to the Japanese "Slam Dunk," because it too dealt with basketball games. Moreover, the film of "Hungry Best 5" was printed and first reviewed in Japan. What is

interesting is that the actual drawings were done in Korea under the Japanese production company, which was supposed to take charge of actual production. Eventually, Korean feature animation was produced in Korea, but the pre- and the post-production work which was supposed to be done in Korea, was carried out in Japan, a case of what must be called "reverse subcontracting" ("Hanguk Animation Geungan," 1997, p. 166).

Figure 5-3. "Hungry Best 5" (1995). (J. Yi,"Hungry Best 5ro mannaneun," 1995, p. 69)

Figure 5-4. Japanese "Slam Dunk."

In the case of "Armageddon" (1996), however, its producer, Armageddon Production Committee, insisted that its animated feature is purely domestic, reflecting the technical associations with Japan in the previous animated features. In spite of its nationalistic appeal, the producer selected the three major directors who had long

careers in overseas subcontracting because the producer wanted to use the skills they learned from subcontracting. One director, Jongshik Nam, had thirteen years of experience in both American and Japanese subcontracting. The other directors Sopung Yi and Wonyong Seong, were chosen for their skills in the American and Japanese styles of animation, respectively (Park & Song, 1996a, p. 108). In addition, animator Wooyoung Jeong, the president of the Youngwoo Production Company admitted that his characters "Joon" and "La La" were also influenced by the Japanese animation that he was subcontracted to do for a long time ("Hanguksik Animation-e," 1996, p. 37).

Simulation of Originality in the Import of Foreign Animation

The three major broadcasting stations (KBS, MBC, SBS) deserve criticism for their nonsensical transfer of imported Japanese animation to the Korean productions, making people believe that these productions were Korean animation. The stations cut Japanese names of production studios, directors, etc. and translate the names of original Japanese characters and regional settings into Korean (N. Shin, et al. 1998, p. 51). Because there is no indication of the animation's origin, it is highly probable that Korean children are confused about their identities. In addition, the import of foreign cartoons entails the merchandising of associated products, which often becomes the importers' main focus. The merchandise earns thirteen times more income than that earned from the animation itself (Y. Yi, 1997, p. 95). This merchandising strengthens Korea's cultural dependence on Japan even more.

The Comic Book Rental Shop and the Cartoon Factory System

The Korean comics publication industry has long been crippled by pirated Japanese comic books and magazines. Illegal copies of Japanese cartoons have penetrated the Korean market. Comic book rental shops demand fast turnover of comic books, which the limited number of cartoonists in the market are not able to handle. In addition, the comics publication industry is established on the basis of a factory system which depends on the small number of cartoonists and many other hired sub-cartoonists. These industrial characteristics inherently limited the domestic market and gave wider room for illegal copies of Japanese cartoons to fill the fast changing demands in the market.

The comic book circulation system used by rental shops originated just after the Korean War (1950-1953) (Y. Choi, 1990, p. 3) and has played an important role as the main consumer of comic books. The rental shop system emerged for children who could not afford to buy the comic books. The comic rental shop circulation system has provided a stable market for Korean cartoonists, allowing a small number of cartoonists to monopolize the market for a long time (Yim, 1993b). Using the star system as a model, the cartoonists adopted the so-called cartoon factory production system, which has put the cartoon market in the hands of a few prestigious cartoonists. They hire between five and two hundred sub-cartoonists to produce comic books under the names of the master cartoonists, who are sometimes never even involved in the drawing of the comic books (C. Han, 1995b). For example, in 1994, Bongseong Park produced 464 comic books, Haengseok Go 360, Jewhang Jeon 258, Hyeonse Yi

223, Wonbin Park 263, and Jaehak Yi 235 with the help of sub-cartoonists (The Korean Cartoonists Association, 1994).

The cartoon factory system confines the cartoon industry to small-scale production which primarily addresses the number of rental shops, not the number of individual readers. Consequently, the rental shop system has inherently scaled down the domestic cartoon industry in Korea. In terms of the number of cartoonists, there were 354 cartoonists, while the active cartoonists were just 100 in 1994 (The Korean Cartoonists Association, 1994). However, after the boom of the cartoons since 1995, the market has been expanded to have about 1,000 active cartoonists in Korea in 1999 ("Jigeobe Segye," 1999). One of the reason of the increased number of cartoonists is that comic books are now competing with other books in the regular book stores.

Despite the increase, however, the cartoon factory system still cannot manage to fulfill the rapidly changing and rising demands of the cartoon market. While the Korean cartoonists enjoyed the factory and the rental shop distribution systems, illegal copies of Japanese comics have become pervasive, appealing to young readers at cheap prices.

Illegally Transferred Japanese Cartoons

KPEC (1993) reported that twenty four Korean publishers produced 5.4 million comic books with forty eight different titles in 1992, while the Korean Cartoonists Association said that illegally copied and plagiarized Japanese comic books sold four million books of 300 different titles from thirty four publishers in the same year (W.

Choi, 1993). Of the total volume of 9.4 million books, the four million illegal copies of the Japanese comic books form 42.5 percent of the total. By 1993, illegal Japanese cartoons made up seventy three percent of all comic book publications (J. Whang, 1994). These illegal Japanese comic books accounted for thirty billion Won ($37.5 million) of the sixty billion Won ($75 million) Korean market in 1993. If the illegal video animation is included, the share of Japanese cartoons will be fifty billion Won ($63 million) of sixty billion Won (Choi, 1994). More recently, in 1997, just two publishers accounted for 1.3 million illegal comic books worth 3.25 billion Won ($4 million) when they were arrested by the police. Each month they bought forty to fifty Japanese comic books in Japan and sold 75,000 to 125,000 illegal copies of them (S. H. Yi, 1997). So far in 1999, Japanese comics have made 1.878 trillion Won ($2.35 billion) of the total Korean cartoon market of 3.991 trillion Won ($5 billion) ("Ilbon Munwha: Manwha," 1999).

Figure 5-5. Original Version I.

Figure 5-6. Pirated Copy I.

The pirated version makes minor changes, such as hair style, to the original. Figure 5-6 carries a Korean name as if the author of the book is a Korean cartoonist (The Korean Cartoonists Association, 1992, pp. 20-21).

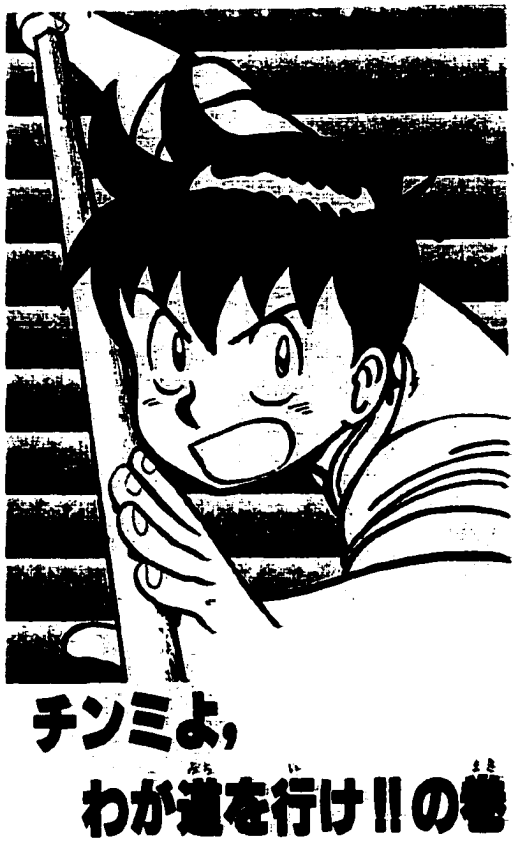


Figure 5-7. Original Version II.

Figure 5-8. Pirated Version II.

Figure 5-8 is the exact copy of Figure 5-7 except background (The Korean Cartoonists Association, 1992, pp. 126-127).

Figure 5-9. The Cover of the Weekly Comic Magazine *Manwha Cheonguk* ("*Comics Paradise*," 1992)

The magazine carried the pirated Japanese comic series. After the series is done the story is published as a book (The Korean Cartoonists Association, 1992, p. 267).

Figure 5-10. Original Version III.

Figure 5-11. Pirated Version III.

The pirated version (Figure 5-11. changes the naked woman in the second panel in the top panels of the original copy by painting the body in black and also deleted the original sensual scenes in the middle and the bottom panels (The Korean Cartoonists Association, 1992, pp. 170-171).

Figure 5-12. Pirated Version IV.

This comic book carries the fake certification symbol of the Korean Publication Ethics Committee (KPEC) in the lower corner as well as a fake statement on the top of the book that indicates that the book was examined for content by the KPEC (Korean Cartoonists Association, 1992, p. 224).

The illegal copies are made by direct copying of the original comic books, or by copying with translated words (Figures 5-7, 5-8, 5-9, and 5-10), or by deleting or modifying obscene and violent pictures in the originals, (Figure 5-13 and 5-14). In the illegal copies, the original Japanese cartoonists' names and the original regional names are changed to fake Korean names to disguise the copies' nationality (KPEC, 1993). In addition, some of the illegally copied comics are carried in the comic magazines first and are only published in book form after the magazine series are completed. This is the most popular way for the illegal publishers, because contents of comic magazines can be reviewed after publishing (Figure 5-12).

In terms of content deliberation, these comic books cannot even be considered for review by the authorities because they are illegal copies. However, the publishers put false certificate symbols and the statements that they are authorized to publish the books (Figure 5-15) on the covers.

The 1952 children's comic book, "Millimeui Wangja" (Prince of the Jungle), was the first plagiarized Japanese cartoon published in Korea. With the success of "Millimeui Wangja," there came the children's cartoon boom after the Korean War (1950-1953) (S. Han, 1989, p. 54; S. Choi, 1990, p. 62). In the 1960s, the Korean cartoon publication markets grew quickly without enough qualified cartoonists to serve the market. This tenuous situation inspired publishers to plagiarize Japanese cartoons to meet fast-growing cartoon demands (S. Choi, 1990, p. 63).

To complicate matters, the publisher Seoul Munwhasa started to carry the Japanese comic "Dragon Ball" in its weekly comic magazine *I Q Jump*, making the

official copyright contract with the original Japanese publisher in 1990 and publishing the comics in book form when the series finished in 1991. The publication of "Dragon Ball," however, triggered the publication of illegal copies of Japanese comic books ("Ilbon Munwha: Manwha," 1998).

Along with copyright law, the Korean cartoon market has other legal filters to protect the public from violent and sensual Japanese cartoons: the Basic Youth Law, the Juvenile Protection Law, the Child Welfare Law, the Foreign Publication Import and Distribution Law, and the Publishers and Printing Companies Registration Law. These laws are applied to the publications by the Korean Publication Ethics Committee, which reviews the contents of these magazines (C. Han, 1995b, p. 149). According to Korean copyright law, the copyright law can be applied only when there is a complaint filed by the copyright holder. Thus, the Korean government cannot take any legal action on the basis of copyright law against illegal Japanese cartoons unless the original Japanese cartoon copyright holders file legal suits for their violated copyrights in Korea. There has been no report of copyright complaints from Japan so far. It is said that the Japanese cartoon industries are constructing a significant market in Korea at the cost of immediate copyright compensation until the Korean market becomes more open to overseas cartoon products. As a result, the Korean cartoon market will provide a considerably profitable cartoon market for the Japanese cartoon industries by instilling Japanese tasks in Korean cartoon consumers.

Furthermore, the Korean cartoon market is flooded with Japanese cartoons because the Korean government has rather been generous toward illegal copies. Even

though the authorities convicted some cartoonists for their sexual sensationalism, illegal copies in Korean society have not been definitively regulated (N. Shin et al, 1998).

Korean Government as Simulator of Cultural Homogenization

A Brief History of Cartoon Censorship

The Korean government has been negative towards the cartoon industry. From the government's authoritarian perspective, cartoons were entertainment only for children. Thus, cartoons have been regarded as a target to be regulated by the Korean government because of their sensual, illusive, and critical contents. Even recently, in July 1997, the Korean Attorney General prosecuted ten prestigious cartoonists for their obscene and violent cartoons. In August, thirty-eight adult cartoonists protested for their constitutional freedom of expression. Then, 300 cartoonists had a meeting and declared the third of November as "the Day of Cartoons" ("11wol 3il Manwha-e Nal," 1997).

After the May 16 military coup (1961), the military government rearranged the country's social and cultural organizations on June 17, 1961. The Hanguk Adongmanwha Jayulwhoe (Korean Children's Cartoons Autonomy Association) was formed in December 1961. Cartoonists and comic book publishers joined the association. Later, the cartoonists left the association, and only the publishers and non-cartoon people reviewed cartoons. Publishers used the association as a strong tool to control cartoonists (Choi, 1995, p. 105). In August 1968, Hanguk Adong Manwha

Yuli Wiwonwhoe (The Korean Children's Cartoons Ethics Committee) was formed and replaced the previous organizations; its head was required to be someone with no role in the cartoon industry (p. 106). The committee could "partially revise," "totally revise," "delete," or "destroy." One month later, the president even ordered the Attorney General to police the cartoon market. Later, on October 11, cartoonists gathered together to form the Hanguk Adong Manwhaga Hyeopwhoe (Korean Children's Cartoons Association) as a response to the government's strong regulation. In 1970, the Hanguk Adong Manwha Yuli Wiwonwhoe (Korean Children's Cartoons Ethics Committee) merged with Hanguk Doseo Japji Yuli Wiwhonwhoe (Korean Books and Magazines Ethics Committee). Apparently, the organizations seemed to have some autonomy, but they were also controlled under the umbrella of the government.

In 1972, an elementary school student committed suicide by hanging. It was reported that he believed in a comic book's portrayal of reincarnation. The schools launched anti-cartoon campaigns, the government policed the comic book market, and the Ministry of Culture and Public Affairs enacted policies that called for government approval of cartoons. Comic book rental stores, publishers, and cartoonists were investigated by the police. But, plagiarized and illegally copied sensual and violent Japanese comic books proliferated to meet the demand (p. 141).

The 1980s started out as a repressive period, with a military coup. The Fifth Republic government announced its "Children and Youth Protection Law" in 1980, specifically aimed at the cartoons. Enacted in this oppressive and hostile atmosphere,

the law especially criticized science fiction animation as "empty and meaningless illusion" for children ("Hanguk Animation Geungan," 1997, p. 163). In the same year, the Hanguk Doseo Japji Yuli Wiwonwhoe (Korean Books and Magazines Ethics Committee) announced "Manwha Jeongwha Bang-an" (Cartoon Purifying Plans) under the oppressive Fifth Republic government that came out of Korea's second military coup in 1980. In addition, the Hanguk Manwhaga Hyeopwhoe (Korean Cartoonists Association) held a meeting of the Cartoon People's Voluntary Purification in November, during which the government's Sawhoe Jeongwha Wiwonwhoe (Social Purification Committee) arrested fourteen comic book publishers and sixty nine cartoonists for their violation of the Children and Youth Protection Law (p. 154).

In December 1980, the broadcasting station KBS began color broadcasting. In February 1982, the government ceased the Night Time Policy which had barred people from being on the street at night. The government tried to divert people's attention from social problems by allowing conglomerates to establish professional soccer teams and baseball teams ("Hanguk Animation Geungan," 1997, p. 156). Despite this easing of restrictions, however, Korea entered into a period of political instability due to the government's illegitimacy, having been created from a military coup in the early 1980s. The government still regulated cartoons. There emerged the "people's cartoons" at that time, which tried to portray working people's sufferings, pains, and anger because of poor working conditions. The cartoonists of the people's cartoons were arrested and imprisoned according to the National Security Law. Strangely

enough, however, the Korean regular cartoon market began to prosper in other genres, such as science fiction cartoons, sensual cartoons, historical cartoons of old heroes, realistic cartoons, etc.

In 1987, the government of the Sixth Republic announced liberalization and democratization of the Korean mass media by repealing the Basic Press Law, which had regulated all of the publication industries under the government's control since 1980 (Youm, 1994, pp. 64-66). Even though the industry became freer in an industrial sense, the broadcasting censorship of cartoon content was still repressive until the government finally abolished the principle of pre-deliberation of television dramas, animation, and documentaries in April 1998 ("Bangsong Beoban Whakjeong," 1998).

Previously, importers of television animation first had to have the permission of the Ministry of Public Affairs for the import, and then the Broadcasting Committee pre-deliberated the contents. In the case of import or production of video animation and feature animation, importers still have to have import or production permission from the Ministry of Culture and Tourism (formerly the Ministry of Culture and Sports), and then the Korean Public Performance Ethics Committee must pre-deliberate the complete work before reaching a final decision ("Hanguk Manwha Hakwhoe," 1997).

In contrast, the pre-deliberation of printed comics is not enforced in Korea because pre-deliberation is against the constitutional freedom of speech. To protect young

people, the publishers and the authors voluntarily[42] ask the Publication Ethics Committee to review the contents. Moreover, the comics carried in the daily newspapers are post-deliberated by the Korean Newspaper Ethics Committee. The cartoons in the publications that publish more often than once a week are also post-deliberated by the Korean Publications Ethics Committee ("Hanguk Manwha Hakwhoe," 1997).

The Korean Government's Overseas Cultural Policy: Its Duality

Korean President Kim Daejung visited Japan on October 7, 1998, and subsequently the government announced on October 20 that it would open the Korean cultural market to Japan in two steps: Phase I, the initial partial opening of the Korean market to Japanese cultural products, and Phase II, complete opening. The immediate opening, Phase I, includes Japanese live-action movies which are co-produced with at least a twenty percent investment by a Korean partner and including Korean actors or directors. The movies also have to get awards in the prestigious international movie festivals. Phase I also applies to original comic books and comic magazines without translation. In case of Japanese video movies, only the movie video carries the presented movies in Korea. Phase II will treat Japanese animation, game software, musical records, and television programs, which will be dealt with by the Korea-Japan Cultural Exchange Joint Committee, to be established later to handle the opening

[42] Of course, the system is not truly voluntary, because booksellers are not free to sell books that have not been reviewed.

schedule ("Il Yeongwha Manwha ," 1998). This second phase had not occurred as of June 1999.

In fact, the government prepared for the opening by testing public opinion. For instance, in March 1998, the government announced that it would officially allow the publication of translated Japanese comic books as long as they met the approval of the Korean Publication Ethics Committee. However, the public's denouncement was so strong that the government called off the plan. Also in 1994, the Minister of Culture and Sports, Romyeong Gong, publicly expressed the government's idea of a gradual opening to Japanese culture and publicized the government's preliminary plan for the opening later in August 1995. But, again, the government failed to actually implement the plan because of serious rejection by the public.

There are two perspectives, passive and active, about the import of Japanese cultural products. The passive perspective comes from the Korean comics and animation industry, which says that the cultural industry, especially the domestic animation industry, is not mature enough to compete with Japanese cultural products. So, the plan must be delayed; otherwise, the market would be completely occupied by Japanese products. The other perspective comes from the government, which explains that opening the Korean cultural market to the Japanese would give the Korean cultural industry international competing power, especially since Japanese cultural products were already disseminated by satellite TV and the black markets.

In addition, since 1945, when Korea was liberated after thirty six years of Japanese colonial occupation the government has banned people from importing Japanese

cultural products, and from performing Japanese dramas and concerts in Korea. However, the Korean government already allowed the industry to import Japanese children's comic books and animation for television and the video market as long as they acquire the copyright holders' permission and pass the content deliberation process by the government. The contents are deliberated especially in the light of whether they have clear and apparent "Japanese colors" (Nam, 1991).

Historically, "Marine Boy," the first Japanese television animation in Korea was broadcast in MBC in 1969. MBC was criticized by the public for importing Japanese animation, not the government, which had allowed it to do so. In this context, it is claimed that the Korean government has held a double policy about the import of Japanese cultural products as pointed out by Wonhong Yi (1994), the ex-Ministry of Culture, who said that on the one hand, the government prohibited the open trade of Japanese cultural products, while on the other hand, it permitted personal contacts for entertainment. Recently, however, the exchange of Japanese cartoons in Korea has left the realm of personal contact and has risen to the public and national level.

In this context, the decision to open the market in 1998 was the government's first official declaration concerning Japanese cultural products in fifty three years. Nelson Shin et al. (1998) argue that the Korean people have already been exposed to Japanese animation in many ways. Pirated copies of Japanese animation have given the people a taste for Japanese animation. Korea, they argue, has already opened its back door to Japanese animation. Now, it just seems that Korea is spending unnecessary time deciding when to officially open the front door to the market (p. 55).

Domestic Resistance to Global Homogenization of Culture

According to a recent report ("Urin Ilbone," 1999), 87.6 percent of young people surveyed said that they are now reading Japanese comics. Ironically, however, 71.4 percent also said that the consumption of Japanese cultural products is a result of Japanese cultural domination. This shows that the more globalized a country's culture is, the more the culture resists the global unifying culture. This is an obvious example of the "glocalization" that Raymond Lee (1994) presents.

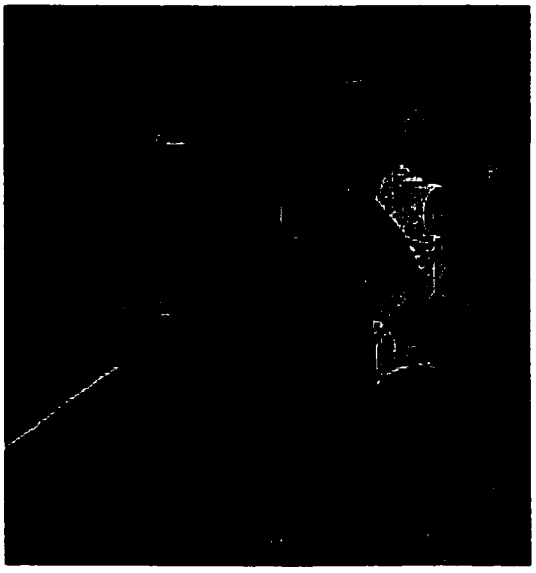


Figure 5-13. "Eojeok Imggeokjeong" (1997). (C. Kim, 1997, p. 109)

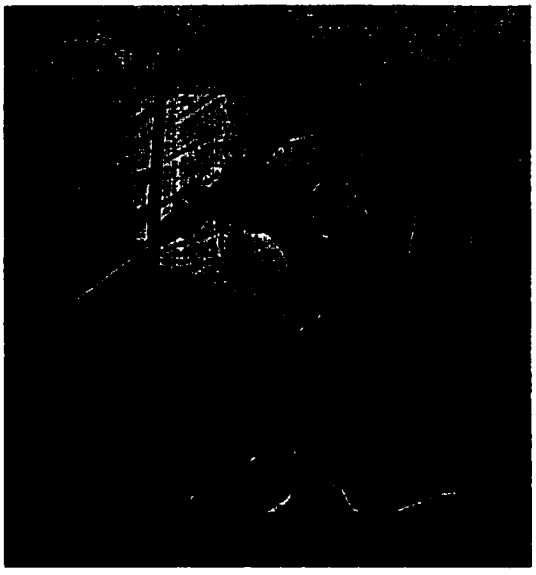


Figure 5-14. "Nanjung Ilgi" (1998). ... ("AWN," 1997b, p. 9)

In terms of the appeal to national identity that appeared as a reaction against earlier animation's dependence upon overseas tastes, it is important to note certain animated features released in 1997 and others still in the process of production for their national identity appeals: "Euijeok Imggeokjeong" (Imggeokjeong the Righteous Gang), by Cheonggi Kim of the Stone Bell Company in association with the Seoul Broadcasting

System (SBS), "Nanjung Ilgi" (War Diary), by Gangmun Byeon of HanGil Productions, and "Odoltogi," by the cartoonist Jaedong Park. These animated features kept in mind criticism about the ambiguity of national identity that was leveled against the stories, settings, and characters of previous animated features.

Figure 5-15. A Character of "Odoltogi." © Odoltogi
("Hanguk Animation Geungan, 1997, p. 172)

"Euijeok Imggeokjeong" especially heeded the criticisms, carefully considering facial features, gestures, walking poses, languages, and colors, and refraining from using computer generated images to preserve old-time settings, and paying close attention to national feelings and emotions in order to protect Korean young people who are familiar with foreign animation ("AWN," 1997a, p. 10; "Hanguk Animation Geungan," 1997, p. 171). Additionally, no computer graphics were used to preserve a

feeling of the old-time settings that the animation was based on ("Yeoreum Banghak," 1997, p. 118).

In the case of "Odoltogi," Park intended to create the Korean-style characters and settings in order to compete with foreign animation, and to express the true story in natural settings by means of what he called "realism animation"--that is a true story with real natural backgrounds ("Hanguk Animation Geungan," 1997, p. 172).

In light of the criticism about the lack of national identity in animation, "Nanjung Ilgi" (War Diary) went much further. Its story was about a national hero, Admiral Sunshin Yi, who several hundred years ago defeated the invading Japanese navy to save the country. Due to its strong appeal to national identity, it was selected as an opening feature in the first Animation Expo festival and joined the Chunchon Anitown festival and the Seoul International Cartoon and Animation Festival (SICAF) in 1997.

In terms of cultural identity and co-production, Jessica Langford (1995) who participated in the first SICAF as a British guest speaker, presented a pessimistic overview of the current international association of animation production:

> These days an animation film is often produced in several countries. The script may be written in Britain, storyboarded in the USA, drawn and filmed in Korea or Taiwan, and finally post-produced in Eastern Europe. This may make sense because the film can be produced as cheaply as possible in such a way. The film does not benefit from the different international cultural traditions that it has been processed through. Instead of a wonderful rich tapestry of cultures and images, a tasteless mishmash is produced. There is a feeling that the film comes from somewhere and nowhere at the same time. There is no sense of cultural identity. There is a sense that all over the world, children in Europe, the States, Africa and Asia are being fed exactly the same (pulp) diet of cheaply drawn characters which perpetrate national and sexual stereotypes (p. 83).

In contrast, Korean animator Tayik Kim argues that the main characters in animation should not have a particular national identity so that audiences can identify with them, regardless of nationality (Tayik Kim, August 16, 1995, personal communication). In this context, the Korean animation industry is asked to be simultaneously national and international, which requires the implosion of the two categories of culture. As a part of cultural semi-periphery, the Korean animation industry is experiencing global cultural intermixing. Japanese culture is strongly involved in this cultural intermixing, especially through Korea's import of Japanese television animation and the illegal cartoon market in Korea.

Conclusion

The Korean animation industry has combined both imitation and creation in its production of domestic animation. The domestic market has been formed in the midst of the subcontracting of overseas animation, heavy import of foreign animation, and the unusual comic book publication market, composed of rental shops tied to a cartoon factory system and the illegal copies of Japanese comics. These factors have suppressed the growth of the Korean domestic cartoon market, making it hard for the industry to compete in a global market in the age of free trade. Imported animation and the illegally transferred Japanese comics take a great share of the domestic market. Thus, the Korean market has been absorbed into the international sub-market, particularly that of Japanese cartoons.

From the viewpoint of cultural imperialism, Korea is both dependent upon the core countries and culturally homogenized with the First World. However, as discussed in the literature review, the Korean animation industry encompasses two dualities: globalization and localization, and standardization and specialization. .

In terms of homogenization of the global culture, the Korean cartoon market is in the process of cultural simulation with foreign cartoons. The cultural simulation stems from an international division of animation production and pervasive illegal copies of Japanese comics in Korea. The global division of labor for the production of cultural products elevates the cultural simulations by exchanging and intermixing their cultural identities. Further, imported and pirated Japanese cartoons not only are falsely identified with Korean nationality, but also subliminally standardized in Korean people's cultural tastes in cartoons. The consumption of foreign cultural products, without knowledge of these products' national origins, creates a hyper reality that the consumed foreign culture is internalized and "imploded" in the domestic consumers' culture. The foreign culture becomes "hyper realistically" more Korean than original Korean styles, especially when the foreign countries are similar in ethnic background. In fact, Japanese animations and comic publications in Korea create cultural simulations to the extent that Korean people cannot easily tell the cultural differences between Japanese and Korean cartoons. The simulation of cultural origins is the primary condition for cultural homogenization between countries.

On the other hand, the cultural simulation also includes cultural resistance to cultural homogenization with other countries. It is notable that the Korean animation

industry made serious efforts to express a Korean national identity in producing such animated features as "Nanjung Ilgi," "Imggeokjeong," and "Odoltogi." The features were not successful at the box office. People seemed to like animation which was neither Korean nor Japanese. In other words, they like animation which is both Korean and Japanese or Korean and any other country. In this sense, it is expected as the animator Tayk Kim of LUK animation once suggested, that animation characters without national origins and stories without particular themes will be considered as universal animation in the world's animation market. Thus, such animation characters as animals and robots will be easily identified with by a universal audience and such themes as sex, environment, and war will be readily accepted as universal interests. Animation without Koran, Japanese, or other countries' cultural characteristics will be a form of cultural simulation in the next stage of domestic animation production.

CHAPTER 6

SUMMARY, CONCLUSIONS, AND RECOMMENDATIONS

Summary and Conclusions

The global division of labor in the production of animation is a unique phenomenon in the mass communication field, but not the subject of serious research. Animation was just regarded as entertainment for children, and also has been the target of criticism for unrealistic and obscene expressions. Korean animation and comics have not been exceptional in this context. Even though the Korean animation industry has played an enormous role in the global assembly line of animation production the industry did not attract attention from the public or the government until 1995. Korean cartoons were even regarded as a social evil in history.

In regard to the industry's history and contemporary professionalization (Research Question One), this dissertation found that growth of the industry fluctuated until 1995 when the industry drew immense entertaining and economic interest from the public and the government for its entertainment and economic value. Ironically, the object of criticism has become a means for survival for the nation in the global environment. Accordingly, the Korean government has changed its attitude toward animation from negative to positive, in other words, from suppression to support. In addition, the domestic conglomerates participate vigorously in the animation industry. As many as six international festivals celebrating animation and comics were held in 1997, costing $58.7 million. Also, twelve colleges with two year programs and five universities with

four year programs in animation have been started. All of these came to be in the four years since 1995. It has been an explosion.

The Korean animation industry started its history with an orientation toward animated advertising and artistic animation in the late 1950s. However, with the impact of imported animated features since 1957 and the success of domestic animated features in 1967, the industry's orientation changed to the production of domestic animated features. At the same time in the late 1960s, however, the industry began to subcontract Japanese and American animation Since that time, overseas subcontracting has become the backbone of the industry.

With respect to the economic nature of the industry (Research Question Two), the industry was found to be in the position of dependent development within the subcontracting environment, relying on the pre- and post-production skills of the client countries in the First World. As a semi-peripheral industry in the global world economic system it also produces its own creative animation, selling in the world market as well as in its domestic market. The current Korean animation market creates 92.4 billion Won ($115.5 million) in revenue (Samsung, 1998), while international co-sponsorship and co-production are emergent characteristics of the industry in order to meet international quality levels and acquire effective distribution channels.

The industry has been preparing for the present volume of animation by subcontracting animation overseas for more than thirty years. To the nation, the industry has become a means of survival of the fittest in the global economic jungle. It is even designated as a "strategic export industry" by the government.

In regard to the cultural nature of the development of the Korean animation industry (Research Question Three), the dissertation found that the patterns of production and consumption of animation in Korea drove the country to be seriously dependent upon foreign countries' culture--especially, Japanese culture. In the production of domestic animation, no animated features had been produced for twelve years in thirty years of its history. Additionally, in the case of television animation, the industry took twenty years to make its first television animation show after its first domestic animated feature in 1967. This frail condition of domestic animation indicates that the growth of the industry is mainly focused on overseas subcontracting, not on domestic production. Moreover, this feeble condition caused the Korean animation market to be heavily dependent upon imported foreign animation.

Culturally, subcontracting overseas animation for over thirty years and the heavy consumption of imported legal and illegal foreign comics and animation positioned Korea in the cultural intermix of the world. In particular, the cartoon-loving generation of the 1960s and the 1970s, when Korea seriously relied on imported cartoons, has become the most economically and culturally active generation. They are the generation of the baby boom in Korea after the Korean War (1950-1953). When the industry and the market started to rise, they were elementary and middle school students. The explosion of animation in the 1990s is actually based on this generation's economic buying power and cultural multiplicity.

This generation has been raised in the settings of cultural homogenization between other countries and Korea, especially between Japan and Korea. The translated or

pirated Japanese cartoons, comics and animation with no indication of national origins were perceived as Korean as their origins were unknown. Japanese animation and comics were "hyper reality" in which Japanese culture and Korean culture are so intermixed and intertwined that they seem to have no difference. Japanese culture has subtly penetrated into Korean culture for a long time. Accordingly, Korean culture becomes more like Japanese culture than Korean culture is originally supposed to be. Perhaps, the simulated homogenized culture could be named "Japarean" or "Korpan" culture as a simulated hyper reality.

On the other hand, there also exists anti-Japanese sentiment due to Korea's experiences under Japanese colonization (1910-1945). The domestic animation producers are aware of the sentiment and reflect it in the works they make. One domestic animation production agent's name is "B-29," named after the American nuclear bomb carrying aircraft which attacked Japan during World War II, symbolizing that the agent fights against Japanese animation. In this context, the Korean animation industry is in the position of cultural "glocalization": globally homogenized and locally resistant culture. This cultural glocalization drives the industry to invent a new creative form of animation that is neither wholly imitation nor wholly original.

In terms of the role that the Korean government plays in the industry (Research Question Four), the dissertation found that the government has made concerted efforts to strengthen the animation industry since 1995 when it realized the importance of animation in national export. As for the Korean government, the dependence upon

imported animation in the domestic market must be changed to the production of domestic animation for export. However, the industry is not ready to effectively handle the domestic market mainly because its basic structure is geared to subcontracting. The government supported the industry with tax exemption and quota regulation against imported animation, with the financial and administrative support of festivals and events and the support of educational institutes. When the government decided to open its domestic cultural market to Japanese popular cultural products in October of 1998, the opening was a serious disappointment to the industry which still claims that it needs more time to be prepared for competition with Japanese cultural products. However, the industry has already been competing with Japanese cartoons in the domestic market with legally and illegally imported comics and animations.

In the future, the Korean animation industry will change from being labor-intensive to technology-intensive. The current Korean animation industry is based on the labor of a great number of workers, while computer-based animation production skills are rising in the client countries. The overseas clients are developing animation production technologies which can save them production cost and time. Currently, digitized computer graphics are applied to animation production, providing the people with new sensibilities of arts and entertainment. This new form of animation is leading the industry from a simple skilled manufacturing labor to a highly advanced computer skilled labor.

Even though seventeen universities and colleges recently started animation education programs in Korea, it is hard to find qualified faculties, in fact, who meet

the needs of the new technologies that they must be equipped with soon. Most programs are still taught by established animators who have traditional cel animation skills. This new arts form of animation is also leading the spin-off industry to a new level of entertainment. For example, the electronic games industry goes into multi-dimensional virtual reality with the help of the digital skills of animation production.

Animation nowadays is a medium which extends people's imaginations and artistic sensibilities in various ways. Unlike live-action movies, animation does not have difficulties in casting actors and actresses. Animators can create characters, rather than use human beings. The fact that animation can easily create non-human characters, such as animal and robot characters, expands animation to wider possibilities of artistic expression, entertainment, and marketing. In this sense, notions of cultural identity or national identity in animation are unnecessary in the future. The matter of identity is subordinate to economics in the current generation where it is not practical for the government and other social organizations to put emphasis on national cultural identity in the contents of entertainment media. The primary choice of the new generation is entertainment itself and identity is second.

The historical, economic, and cultural implications of animation as an entertainment medium are enormous from the perspective of mass communication studies. The development of skills of animation production is one of the histories of mass media. Historically, this dissertation found that animation was the father of live-action movies. Animation has adopted newly developed visual technologies. In this

sense, the development of animation will represent the development of other mass media in the history of mass communications.

Economically, the animation industry is the sum of the entertainment industries. Animation is a medium that has almost limitless economic applications. Thus, animation becomes a spring of economic success. It is even said that animation is made in order to produce spin-offs. In the mass communication field, a medium like animation with countless spin-offs has been rare.

In a cultural sense, animation is not only meaning text in which reality is reconstructed, synchronized, and simulated, but also animation is technologically determined text by full and limited production skills and computer software. Accordingly, animation is a cultural product within the frame of technological grammar that animation is supposed to follow. Animation retrieves technological determinism in the mass communication field.

Recommendations for the Korean Animation Industry

For a better future, the industry must focus on the support and education of the next generation's animators. In the Second Seoul International Cartoon and Animation Festival in 1996, independent work made up eighty five percent of the work in the competition, while work from animation production companies and others made up just fifteen percent (S.H. Park, 1997, p. 52).

In England, "Animate!" a highly successful and innovative scheme for animation on television, was begun in 1990 by the Arts Council of England and Channel Four

television. Animate! provides funding each year to enable a small number of young animators to work within a more secure production framework and gives those already established in the industry the freedom to be more experimental ("AWN," 1996c, p. 64). According to Langford (1995), one of Channel Four's aims was to provide an opportunity for new films and independent filmmakers. This policy of investing in artists, in the quality of ideas and the message and creative artwork of film completely changed the potential of animation production in Britain. The criteria for funding new animation films included not only "Will this film make money," but "Is it a good film?" In just fourteen years, this policy resulted in a huge upsurge in individual creative films made by animators in small studios. It is not mass production. These films represent a wide spectrum of British society and culture. That is the secret of their success. What started out as an unlikely economic venture developed into a thriving industry (p. 82). This British case shows the importance of the role that television stations can play in the industry. The Korean broadcasting companies need to provide active support for the industry as Channel Four is doing for the British animation industry.

Another interesting case is that of a labor union investing and supporting its own workers. The workers' union of the American animation industry shows the important role of a union in supporting the industry. The American workers' union with its 3,000 members is educating and retraining its members for their survival in the world market. The Motion Picture Screen Cartoonists (MPSC) in America established the American Animation Institute (AAI) in 1980 to further the retraining of the members

and to provide a low cost way for new talent to get animation training. All of the AAI's teachers are currently working professionals who come to the classroom directly from their studios. When the AAI was started, the total student enrollment was around forty. With the current boom in animation, 750 students have enrolled (Sito, 1998). The AAI is a case of industry teaching the industry itself.

In addition, the Alliance of Motion Picture and Television Producers (AMPTP) has gathered dozens of studio professionals to help train high school teachers who want to integrate new media into classes. Also, visual effects studios and entertainment companies, such as Paramount, Warner Bros. And Sony Pictures, which are desperate to speed up the education of a new generation of technicians, have all opened their digital animation shops to educators who want to see exactly what to teach aspiring animators. They are pouring energy and resources into new high school and college technology programs. For example, they worked together with Santa Monica College to develop its eagerly anticipated Academy of Entertainment and Technology in California. The Academy offers programs in computer animation and visual effects, theme park technology, and new media and business. Sony's digital studio division donated more than one million dollars to create a media center at University of Southern California (USC) (Gold, 1997). It is notable that not only production studios but also related industries are making serious efforts to develop educational programs.

The Korean animation industry needs to maintain itself regardless of the support from outside, especially from the government. The Korean industry is seriously

dependent on the government, both physically and psychologically. In other words, the government has interfered in the industry in many ways. The industry was categorized as a "social evil" in the 1960s and as an "export-strategic industry for the nation" in the 1990s. The industry was has been suppressed and supported. Recently, the government's decision to open the cultural market in Korea to Japanese cultural products agitated the people in the industry. It is of no use to be agitated. Now is the time for the industry to support itself. The American animation industry workers suffered when they lost their work to the Asian countries. Now they know how to protect themselves from outside challenges.

The case of the Netherlands suggests a national model for the effective support of the industry by establishing an infrastructure for animation production. The Netherlands Institute for Animation Film (NIAF) was established to improve an infrastructure for animated film in the Netherlands, both for director's film (artistic film) and for specially-commissioned films (commercial film). In conjunction with various universities in the Netherlands, the NIAF exists to provide information on animation film in relation to the history of art, communication, information technology, and business management, exhibition, education, research, distribution, collection, archives, and promotion. The NIAF also offers practical training for students who wish to examine a particular aspect of animation film in more detail. The NIAF is also looking beyond its national borders to seek cooperation and partnerships with people, organizations and festivals across the entire globe. Korea's "Media Park" and "Techno Park" projects in local cities, and the plans to found animation centers or

cartoon information centers should not be independent and separate from one another. Effective networking of the centers and projects needs to be considered.

Suggestions for Further Studies

Finally, this dissertation's examination of the Korean animation industry offers the following suggestions for further studies: the relationship between technique and expression and the legal ramifications of authorship.

First, expression in animation is inherently subject to the techniques that animators employ. As we discussed in Technical Characteristics in Chapter 4, expressions of violent and fast moving action such as fight scenes and explosions use limited animation skills which are much more economical than the use of full animation skills. In terms of the technical skills required, violent action animation is easier, cheaper, and faster to make. Violent action animation is made not only because people like it, but also because the cheaper and faster technique effectively fits the production of those kinds of animation. In this context, expression in animation is technologically determined in nature. When we examine the expression of animation from cultural or aesthetic viewpoints, we easily miss the intrinsic requirements of expression for particular techniques. Technological determinism should be applied and considered to interpret and analyze the contents of animation.

In addition, the global division of labor in animation production brings about a legal matter of "works made for hire" and authorship. In the case of publication, the Copyright Act in 1976 specifies two made-for-hire situations: 1) works "prepared by

an employee within the scope of his or her employment," and 2) works "specially ordered or commissioned" and agreed to in writing to be works made for hire. In these circumstances the publisher may be considered the "author" and first copyright owner. A newspaper publisher, for example, would be the "author" of everything copyrightable in each issue of the newspaper; only by special agreement would a news reporter or a columnist retain rights to his or her copyrightable work (Gillmor et al., 1990, p. 611). This notion of 'works made for hire' raises a question of the appreciation of the genuine efforts of hired workers. The law defines the copyright holder as the 'author,' rather than the creator. There is a discrepancy of rights between the original author's (or hired worker's) and the copyrighted author's. The law focuses on the copyright holder's economic rights of reproduction and distribution. The original workers' artistic efforts and his or her moral right to be appreciated for his or her effort are missing when works made for hire. Subcontracting as a form of works are made for hire also raises the same question of the Korean subcontractors' moral rights. Even though they are economically compensated by their clients, they are not culturally and morally compensated in the world.

BIBLIOGRAPHY

Agi gongryong Dooly--Eoreum byeol moheom [Baby dinosaurs Dooly—Adventure of ice planet). (1996). Animatoon, 2 (6), 86-87.

Amin, S. (1976). Unequal development. New York: Monthly Review Press.

Animation panorama. (1995). In SICAF Promotion Committee (Ed.). Seoul International Cartoon and Animation Festival 95. Seoul, Korea: Seoul Munwhasa, 39-45.

Animation terminology. (1997). Animatoon, 3 (8) 106-107.

Animation world news (AWN). (1996a). Animatoon, 2, (3), 38-57.

Animation world news (AWN). (1996b). Animatoon, 2, (5), 56-67.

Animation world news (AWN). (1996c). Animatoon, 2, (6), 50-69.

Animation world news (AWN). (1996d). Animatoon, 2 (7), 50-70.

Animation world news (AWN). (1997a). Animatoon, 3 (8), 8-35.

Animation world news (AWN). (1997b). Animatoon, 3 (9), 8-30.

Animation world news (AWN). (1997c). Animatoon, 3 (10), 8-33.

Animation world news (AWN). (1997d). Animatoon, 3 (11), 9-30.

Animation world news (AWN). (1998a). Animatoon, 4 (2), 62-68.

Animation world news (AWN). (1998b). Animatoon, 4 (12), 48-67.

Animation world news (AWN). (1998c). Animatoon, 4 (15), 40-59.

Animation yeoungwhasijang chanbaram [Chilly winds in the animation market]. (1997, September 15). Korean Central Daily News Magazine. 26.

Animationdeung youngsang munwhasaneuob gumyung jiwone gil yeollyeo [Road to financial aid is open for visual industry of animation, etc.]. (1996). Animatoon, 2 (4), 33.

Animatione saeroun jipyeongeul yeoneun saramdeul [The people opening a new horizon of animation]. (1995). Animatoon, 1 (1), 46-47.

Animationgye saebaram ireukigo inneun jeolmeunideul [Young people who make new wind in the animation arena]. (1995). Animatoon, 1 (2), 102-103.

Animaiton yesure saeroun daejungjeok pyohyeon yangsik jesihan prodeure moim 'Dahl'['Dahl' which presents a new popular expression styles]. (1996). Animatoon, 2 (7), 102-103.

Armageddon Production Committee. (1995, November). 21segi Munwhachoejong Jeonjaeng Armageddon Bodojaryo [Press release: The last cultural war in 21st century--"Armageddon"]. Unpublished raw data.

An, Y., "Hanguk manwha yeoksa" [Korean cartoons history]. http://home.taegu.net/~an1004/ (18 May, 1996).

Bamyeh, M. A. (1993). Transnationalism. Current Sociology, 41 (3), 1-95.

Bangsong beoban whakjeong. (1998, April 20). Chosun Ilbo. http://www.chosun.com/w21data/html/news/199804/199804200365.html/ (30 Jul. 1999).

Barthes, R. (1977). Image, music, and text: essays selected and translated by Stephen Heath, NY: Hill & Wang.

Baudrillard, J. (1988a). Symbolic exchange and death. In Mark Poster (Ed.). Jean Baudrillard: Selected Writings, Stanford: Stanford University Press.

Baudrillard, J. (1988b). Simulcra and Simulations. In Mark Poster (Ed.). Jean Baudrillard: Selected Writings, Stanford: Stanford University Press.

Best, S. and Kellner, D. (1991). Postmodern theory: Critical interrogations. New York: The Guilford Press.

Bongyeok clay animation changjage dojeonhaneun studio 'MARU' (Studio 'MARU' which challenges professional clay animation production). (1997). Animatoon, 3 (8), 110-111.

Boyd-Barret, O. (1977). Media imperialism: Toward an international framework for the analysis of media systems. In J. Curran, M. Gurevitch and J. Woollacott (Eds.). Mass communication and society. London: Arnold, (pp. 116-135).

Brasch, W. M. (1983). Cartoon monickers: An insight into the animation industry Bowling Green: Bowling Green University Popular Press.

Bray-Hurd: The key animation patents. (1988). Film History, 2 (3), 229-266.

Brewer, A. (1980). Marxist theories of imperialism –A critical survey. London: Routledge and Kegan Paul.

Bukhan, woegukgwa manwhayeongwha hapjak sa-eop jeokgeuk chujin [The North Korea active to co-produce animation with foreign partners]. (1997, March 15). Chosun Ilbo. http://www.chosun.com/w21data/html/news/199703/1997031500365.html/ (20 Jan. 1999).

Calahan, David. (1988). Cel animation: Mass production and marginalization in the animated film industry. Film History, 2 (3), 223-228.

C & A han jangreue gukhandwoeji anneun dagakjeokin whaldongeul hago inneun animation yeongu dongari [The animation group C & A which makes various trials], Animatoon, 3 (10), 102-103.

Changrip 70junyeon manneun hanguk bangsonggongsa, gongyeong bangsongi damanaeneun animatione haengbo [70th anniversery of KBS establishment, traces of animation done by the public broadcasting station]. (1996). Animatoon, 2 (3), 30-33.

Cheil Jedang, multi media group seoneon [Cheil Jedang declares itself as multi-media group]. (1997, March 28). Chosun Ilbo. http://www.chosun.com/w21data/html/news/199703/199703280099.html (20 Jan. 1999).

Chilcote, R. H. (1974, Spring). Dependency: A critical synthesis of the literature. Latin American Perspectives, 1, 4-29.

Choi, J. S. (1998, March 17). Animator, Yeoseong ingijikjong busang [Animator is rising as a popular job for women], Chosun Ilbo. http://www.chosun.com/w21data/html/news/1998317/199831710058.html/ (1 Jun. 1999).

Choi, J. W. (1994, March 2). Manwha: Guksan yukseongchaek eopsin dongsim ppaetginda, Il daejungmunwha gaebangdoemyeon 3. [Cartoons: Children's heart will be deprived of without political support of domestic cartoons, What if we open our cultural market to the Japanese popular culture]. Hanguk Ilbo, 15.

Choi, P. M. (1999, January 6). [Introduction to Hahn Shin Corporation]. Unpublished raw data faxed.

Choi, W. (1993, August, 30). Mudan bokje ilbon manwha yeon 4,000,000 bu: Munbangu seojeom tonghae geupsok whaksan [Four million books of pirated Japanese cartoons, rapid distribution of through stationary shops and book stores]. Chosun Ilbo. 30.

Choi, Y. (1990, November & December). Hanguk geun-hyeondae manwha-e baljachi [The footprints of the modern-contemporary Korean cartoons]. Ghanah Art, 58-71.

Choi, Y. (1995). Hanguk manwha-e yeoksa [The History of Korean cartoons]. Seoul, Korea: Yeolwhadang.

Chunchon--Manwha yeongwha jejakeopche idaljung cheotjinchul [Chunchon—First moving animation studios to Chunchon in this month]. (1997, June 8). Chosun Ilbo, http://www.chosun.com/w21data/html/news/199707/199707080142/ (30 Jul. 1999).

Chunchon multi media teukseongwha [Chunchon city's specialization in multi media]. (1999, January 4). Hankyoreh Shinmun. http://news.naver.com/iiop/news_view?id=146277235&query=%C3%E1%C3 %B5 +%C6%AF%BC%BA%C8%AD/ (30 Jul. 1999).

Cover story. (1996). Animatoon, 2 (6), 4.

Craft, D. (1982). Before Mickey—The animated film 1898-1928. Cambridge, MS: The MIT Press.

Crook, S., Pakulski, J. & Waters, M. (1993). Postmodernization: Change in advanced society. London: Sage.

Dangjeong, bangsong wejujejak yeogeon whalseongkiro [The party's policy, activation of the broadcasting companies' production environment]. (1997, February 5). Joongang Ilbo, 12.

Davin, C. (1997). Global competitive strategy of French animation. Animatoon. 3 (9). 89-92.

Dayanghan soje balgul naseon ANI [ANI seeking for various themes]. (1996). Animatoon, 2 (5), 98-99.

de Graze, V. (1989). Mass culture and sovereignty: the American challenge to European countries, 1920-1960. The Journal of Modern History, 61(1), 53-87.

Deneroff, H. (1987). "We can't get much spinach!"—The organization and implementation of the Fleischer animation strike. Film History, 1. (1), 1-14.

Dews, P. (1987). Logics of disintegration: Post-structuralist thought and the claims of critical theory. London: Verso.

Digital animatione saeroun jigeob [New profession of digital animation]. (1996). Animatoon, 2 (5), 92-93.

Dorfman, A. and Mattelart, A. (1975). How to read Donald Duck: Imperialist ideology in the Disney comic. New York: International General.

DreamWorks SKG. (1995). Animatoon, 1 (2), 19-21.

Drunen, E. & Peterrs, M. (1998). (1998, January). Netherlands Institute for Animation Film (NIAF). Animation World Magazine, 2 (10). http://www.awn.com /mag /issue2.10/2.10pages/2.10netherlands.html (30 Jul. 1999)

Edelman, B. (1979). Ownership of the image—Elements for a Marxist theory of law. Boston: Routledge and Kegan Paul.

Emmanuel, A. (1972). Unequal exchange, A study of the imperialism of trade. New York: Monthly Review Press.

Event haengsa yeolam [Directory of Events]. (1997). Motion, 8, 162-165.

Foucault, M. (1979). What is an author?. In Harari (Ed.). Textual strategies: Perspectives in poststructuralist criticism. Ithaca, NY: Cornell University.

Friedman, J. (1994). Cultural identity and global process. London: Sage Publications.

Galtung, J. & Vincent, R. (1992). Global glasnost: Toward a new international information/communication order?. Cresskill, NJ: Hampton.

Gajokgwa whansangeul temarohan teuksaekinneun film festival [The interesting film festival with the theme of family and fantasy]. (1997). Animatoon, 3 (10), 50-53.

Gillmor, D. M., Barron, J. A., Simon, T. F., & Terry H. A. (1990). Mass communication law: Case and comment (Fifth Ed.). St. Paul: West Publishing Company.

Gungnae animation dongarie hyeonjuso [Current state of domestic animation fan groups]. (1996). Animatoon, 2 (7), 99-101.

Geupbyeonhaneun segye bangsong animaitongye-e donghyang [Trends of dynamically changing world television animation]. (1997). Animatoon, 3, (8), 48-59.

Geumgang Giwhoek, animation sa-eob jinchul [Geumgang Giwhoek moves toward animation business]. (1996, July 9). Chosun Ilbo. http://www.chosun.com/w21data/html/news/199607/199607090149.html/ (30 Jul. 1999).

Gold, M. (1997, June 2). Digital arts classes go to schools, LA Times.

Gungnae animation gyoyukgigwan jipjung annae [Intensive guide to the Korean animation educational institutions]. (1996), Animatoon, 2 (7), 94-98.

Gungnae animation gyoyukgigwan annae [Guide to the Korean animation educational institutions]. (1998), Animatoon, 4 (12), 80-89

Gusipchil ('97) Chunchon manwhachukje [Chunchon Comics and Animaiton Festival]. (1997). Animatoon, 3 (10), 44-47.

Gusipchil ('97) Seoul segye animaiton expo ['97 Seoul International Animaiton Expo]. (1997). Animatoon, 3 (10), 38-42.

Gusibo (95) Seoul gukje manwhajeon ['95 Seoul International Cartoon and Animation Festival]. (1995). Animatoon, 1, (2), 24-31.

Gyeonggi: Yeongsang manwhagogyo seolip [Gyeonggi province will establish a visual cartoon art high school]. (1999, September 18). Hankyoreh Shinmun. http://news.naver.com/iiop/news_view?id=142738414&query=%BF%B5%BB%F3%B8%B8%C8%AD%B0%ED%B1%B3/ (30 Jul. 1999).

Haewoe gongdongjejakchegyewa jeolmeunideure giwhoek chamyeo [International co-production system and young people's participation of planning]. (1995). Animatoon, 1 (2), 42-44.

Halas, J. & Manvell, R. (1971). The technique of film animation. New York: Hasting House.

Halas, J. (1976). Film animation: a simplified approach. Paris: UNESCO

Halas, J. (1987). Master of animation. Topsfield, MA: Salem House.

Hamelink, C. J. (1983). Cultural autonomy in global communications: Planning national information policy. London: Longman.

Han, C. (1995a). Festival reference data—SICAF 95wa hanguk manwhasaneob jeonmang [SICAF 95 and overview of Korean cartoon industry]. In SICAF Promotion committee (Ed.), Seoul international cartoon and animation festival 95 (pp. 262-267). Seoul, Korea: Seoul Munwhasa.

Han, C. (1995b). Hanguk manwha saneob yeongu [Study of Korean cartoon industry]. Seoul: Glnon grimbat.

Han, C. (1996). Economics of comics & cartoon and animation festival—vision of comics and animation in cyber space in the 21st century. In SICAF 96 Promotion Committee (Ed., Seoul International Cartoon & Animation Festival 1996, Seoul, Korea: Seoul Munwhasa, 276-289.

Hanguk animation geungan jomyeong [Review of recent Korean animation]. (1997, June). Motion, 162-178.

Hanguk animationgyereul iggeureo ganeun saramdeul [The leading people of the Korean animation arena]. (1996). Animatoon, 2, (3), 10-16.

Hanguk animation saneobi pureoya hal gwaje[Tasks to be solved by Korean animation industry]. (1998). Animatoon, 4, (15), 60-63

Hanguk manwha hakwhoe changrip symposium [Inaugural symposium of the Korean Comics and Animation Society]. Animatoon, 3. (8). 96-98.

Hanguksik animation-e saeroun tansaeng [New birth of Korean style animation]. (1996). Animatoon, 2, (3), 36-37.

Hanho Heung Up. (1995). Brochure of introducing the company. Unpublished raw data.

Han, S. H.. (1995). "Animation-gwaeui 40 nyeon" [40 Years with Animation], Animatoon, 1, (1), 86-87.

Han, S. C. (1989, July). Sangeopju-eui-e pyeonseunghan manwha sidae (The age of cartoons riding on commercialism), Sulmeot, 53-59.

Harvey, D. (1994). The Condition of postmodernity: An enquiry into the origin of cultural change. Cambridge, MA: Blackwell.

Harvey, J. & Houle, F. (1994). Sport, world economy, global culture and new social movements," Sociology of Sport Journal, 11, (4), 337-355.

Heraldson, D. (1975). Creators of life: A history of animation. New York: Drake Publishers.

Hoffer, T. W. (1981). Animation—A reference guide. Westport, Connecticut: Greenwood Press.

Il yeongwha manwha jeuksi gaegbang [Immediate opening of the Japanese movie and comcs]. (1998, October 20). Chosun Ilbo. http://www.chosu.com/w21data/html/ news/199810/199810200108.html.

Ilbon munwha: Manwha, imi sijang neolban jamsik [Japanese culture: Cartoons already occupied the market]. (1998, October 20). Hankyoreh Shinmun, http://news.naver.com/iiop/news_view?id=14378723 1&query=%C0%CF%BA %BB%B9%AE%C8%AD/ (30 Jul. 1999).

Il TV manwha 'Pokemon' sicheongja 10% baljak [Ten percent of the audience of Japanese animation "Pokemon" experienced spasm]. (1998, June 27). Hankyoreh Shinmun http://news.naver.com/iiop/news_view?id=140017973&query=%C6%F7%C4% C9%B8%F3/ (30 Jul. 1999).

Im, Jeonggyu. (1996). "Jakwhajireul Sseureonaemyeo Maeume Grimeul Grinda [I am Drawing in My Heart Cleaning Drawing Paper], Animatoon, 2, (5), 96-97.

Independent animation group. (1997). In SICAF 97 Promotion Committee (Ed.). Seoul International Cartoon & Animation Festival 1997, Seoul, Korea: Seoul Munwhasa, 66-77.

International animation studios directory. (1998). Animatoon, 4 (15), 104-108

Jamjago inneun MBC manwhayeongwha jejak [MBC's production of animation is sleeping]. Animatoon, 4 (2), 34-37.

Jelwhoe '97 Dong-A. LG gukje manwha festival [The first Dong-A.LG cartoon festival]. (1997). Animatoon, 3 (10), 48-49.

Je2whoe Seoul gukje manwha festival [The 2nd Seoul International Cartoon and Animation Festival]. (1996). Animatoon, 2, (6), 20-23.

Jeon, B. (1998). Networksoge animation sarang [Love of animation in the internet], Animatoon, 4, (13). 88.

Jeon Myeongok sajang -"Sunyeonnae changjak manwha suchul" [President Myeongok Jeon-Domestically created animation will be exported in several years]. (June 25, 1997). Chosun Ilbo. http://www.chosun.com:8080/ cbot/cgi/ demo.cgi?FID= 51595&key= 만화^ 영화^, (4 Mar. 1998).

Jeong, D. (1996). Cel 240maero Mandeun "Gaemiwa Baetzangi" ["Ants and the Locust" made with 240 Cels], Animatoon, 2, (6), 98-99.

Jeonwhangi majeun hanguk bangsong animation jipjung bunseok [Intensive analysis of Korean television animation in transition]. (1997). Animatoon, 3 (8), 36-47.

Jigeobe segye: Manwhaga 1000 yeomyeong whaldongjung [Worlde of occupations: 1,000 cartoonists are active]. (1999, March 7). Hankyoreh Shinmun. http://news.naver.com/iiop/news_view?id=270565844&query=%C1%F7%BE%F7%C0%C7+%BC%BC%B0%E8/ (30 Jul. 1999).

Jin, S. (1998a, January 18). TV suchul dubae [Television program export double-timed]. Chosun Ilbo. http://www.chosun.com/w21data/html/news/199801/199801180184.html (30 Jul. 999).

Jin, S. (1998b, February 13). Murdoch whoejang mundap [Q & A with the president Murdoch], Chosun Ilbo, http://www.chosun.com/bin/softbot.cgi?OP=20&PG=0&QR=%B8%D3%B5%B6%C8%B8%C0%E5&LB=0100000000&FD=1&D1=&D2=&RD=2&D3=19980101&D4=19991231&D5=&D6=&SH=2&LC=10&WC=/ (30 Jul. 1999).

Jiyeok jeongbowha hyeonjang –Hobandosi Chuncho-e aniamtion dream [The Field of local information—Animation dream of lake city Chunchon]. (1997, June 6). Chosun Ilbo, 10.

Jung, W. (1995, August 1). Introduction to Daiwon Animation Company. Unpublished raw data.

Jung, W. (1994, December 6). Manwhayoungwha saneobeui hyeonwhanggwa jeonmang [Current situation and prospect of animation industry]. Paper presented in The Symposium for Animation Industry Development held by Korean Ministry of Culture and Sports, Seoul, Korea: 3-17.

Kang, J. (1995). Dagukjeok, damaeche yeongsang saneobe yukseong bangan—Miguk yeongsang saneobeul jungsimeuro [Suggestions for development of multi-national, and multi-media visual inddustry—focusing on the American visual industry]. (1995, summer). Bangsong Yeongu (Journal of Broadcasting Research), 123-152.

Katz, E. & Wedell, E G. (1977). Broadcasting in the third world: promise and performance. Cambridge: Harvard University Press.

KBS-MBC jachejejak manwhayeongwharo matdaegyeol [KBS and MBC compete each other with their own animation]. (1996, September 3). Chosun Ilbo. http://www.chosun.com/w21data/html/news/199609/199609030068.html (30, Jul. 1999).

Kim, C. (1997). Songchungi galipeul meogeo dwegenna?,"[How can caterpillar eat reeds?], Animatoon, 3, (8), 108-109.

Kim, D. (1997). Case study: choegeun jejaksaeob project-e pyeongga [Case study: evaluation of recent production project]. In In Tooniverse and Joongang Daily Newspaper (Eds.), Symposium--Miraereul Wihan Hanguk Animatione Jeolyak [Symposium--Strategy of Korean Animation for the Future. (pp. 39-50). Seoul.

Kim, G. (1997, June 6). Hanguk animation 30nyeon choeage jachejejakguk" [30 years of Korean animation found Korea as the worst country of domestic Animation production], Dong-A Ilbo, http://ws.donga.com/fbin/search?n=199706060015&l=1&word1=자체제작국&word2=&code=&term=1&date1=&date2=&log=1&range=3&order=1&id= MIRRID7295757908640501 2/ (30 Jul. 1999).

Kim, H. (1997, June 30). Bangsongsa, manwhayeongwha character jangsa howhang [Broadcasting companies, boom of animation character business], Dong-A Ilbo. http://ws.donga.com/fbin/search?n=199706300032&l=0&word1=캐릭터장사호황&word2=&code=&term=1&date1=&date2=&log=1&range=3&order=1&id=MIRRID951172202487054/ (30 Jul. 1999).

Kim, H. (1996). Geu nugudo haeboji anteon jageob (Jobs never done before). In Armageddon production committee (Ed.). Armageddon baekseo [Armageddon white book] (pp. 23-46). Seoul.

Kim, I. (1995). Umjigineun manwha-e kkum [Dreams of moving cartoons-Shin brothers]. In J. Park (Ed.), Hanguk Manwha-e Seongujadeul [Pioneers of Korean Cartoons], Seoul: Yeolwhadang, 49-63.

Kim, J. H. (1996). Cheone eolgurul gajin animation [Animation which has thousand faces], Armageddon baekseo [Armageddon white book], 225-249.

Kim, J. W. (1996a). Gwalli, yeoungwha jejak (Management, produciton of movie). Armageddon baekseo [Armageddon white book], 81-86.

Kim, J. (1996b). Cheoljeohan sajeonjunbiwa gyumoinneun yesanjiphaeng-e piryoseong [The need of complete preparation and reasonable budget plan]. Armageddon baekseo [Armageddon white book], 87-97.

Kim, S. (1999, January 30). [Introduction to Hanho Heung Up]. Unpublished raw data.

Kim, S. (1997, April). Hanguk manwhyeongwhayeongwha-e haewoesaeob jeolyak [Overseas business strategy of Korean animation]. In Tooniverse and Joongang Daily Newspaper (Eds.), Symposium--Miraereul Wihan Hanguk Animatione Jeolyak [Symposium--Strategy of Korean Animation for the Future. (pp. 59-65). Seoul.

Kim, S. (1996). "Cel-eul ssiseo animation-eul mandeuldeon sijeol (Those days when we made animation by washing cels), Animatoon, 2 (3), pp. 98-99.

Kolon, SBSwa chracter saeop jehyu [Kolon is associated with SBS for character business]. (1997, January 18). Joongang Ilbo. http://www.joongang.co.kr/cgi-bin/sfa?id=19970120094600&query=캐릭터+캐릭터+코오롱+/ (30 Jul. 1999).

Korean Animation Producers Association. (1995, August). [Directory of member companies]. Unpublished raw data.

Korean Cable Television Association. (1994, December). Dongnip production hyeonwhang mit whalseongwha bangan [Current situation of independent production and development plan]. Unpublished raw data.

Korean Cartoonists Associaiton (KCA). (1992). Ilbon manwha bulbeoppyojeol bokje jaryojip [Data selections of the illegal copies of the Japanese comics]. Seoul: Manwha munwha yeonguso [the Research institute of cartoon culture].

Korean Cartoonists Associaiton (KCA). (1994, Winter/New Year). Whoeweon myeongdan [Directory of members]. Manwhateo, 8, 54-61.

Korean Publication Ethics Committee (KPEC). (1993, December). Ilbon manwha-e yutong hyeonwhanggwa gudoksiltae josa [Survey report of the current circulation of Japanese cartoons and readership]. Seoul: KPEC.

Korean Publication Ethics Committee (KPEC). (1994). Manwh daeyeo eopso yutongsiltae josa [Survey of actual situation of cartoons circulaiton through cartoon rental shops, conducted on November 27 through December 20, 1993]. Ganhaengmul Yuli [Publication Ethics Bulletin], 17 (4). 15-17.

Kuroso, M. (1997, April). Ilbon animation saneobe gukje gyeongjaengryeok yoso [The factor and element that make the Japanese animation industry competitive]. In Tooniverse and Joongang Daily Newspaper (Eds.). Symposium--Miraereul Wihan Hanguk Animatione Jeolyak [Symposium— Strategy of Korean Animation for the Future]. (pp. 13-20). Seoul.

Langford, J. (1995). Animatin and cultural identity. Animatoon, 1, (2). 80-83.

Lee, C. C. (1980). Media imperialism reconsidered: The homogenizing of television culture. Beverly Hills: Sage Publications.

Lee, R. L.M. (1994). Globalization and cultural change in modernization, postmodernism and the third world. Current Society, 4 (2), 27-63.

Lent, J. A. (1977). Third world mass media and their search for modernity. Cranbury, NJ: Associated University Press.

Lent, J. A. (1980). Case studies of mass media in the Third World (Series: Studies in Third World societies). Williamsburg, Va.: Dept. of Anthropology, College of William and Mary

Lent. J. A. (1987). Mass media in the Leeward islands: Press freedom, media imperialism, and popular culture. Studies in Latin American Popular Culture, 6,. 245-258.

Lent, J. A. (1994, January). Hanguge manwha: Yeoksajeok hyeondaejeoj jomang [Korean cartoons: The old and the contemporary]. Shinmungwa Bangsong [Newspaper and Broadcasting], 94-100.

Lent, J. A. (1995). Comics in East Asian countries: A contemporary survey. Journal of Popular Culture, 29 (1), 185-198.

Lent, J. A. (1997). Shin Dong Heon, an old warrior in Korean animation. Animation World Magazine. 1 (11, February). http://www.awn.com/mag/issue1.11/articles/lent1.11.html/ (6 May, 1999).

Lent, J. A. (1998). The animation industry and its offshore factories. In G. Sussman and John A. Lent (Eds.). Global producitons: labor in the making of the "information society." Cresskill, NJ: Hampton, 239-254.

Lerner, D. & Schramm, W. (Eds.). (1967). Communication and change in the developing countries. Honolulu: East-West Center Press.

Manwha animation hakwhoe jeonggi haksuldaewhoe [Comics and animaiton society regular academic conference]. (1998, April 23). ETNEWS. http://channel.etnews.co.kr/etnews/new_etnews_content?1998042300041|0. (1, Oct. 1998).

Manwhasijang 2: guksan manwhayeongwha myeoljongwigi [Cartoon market series 2: exterminaiton crisis of domestic animaiton]. (1993, October 15). Hankyoreh Shinmun, 15.

Manwhayeongwha 'wonjo'-e dojeonhanda [Claiming for the first animaiton]. (1998, June 29). Hankyoreh Shinmun, http://news.naver.com/iiop/news_view?id=140084143&query=%B8%B8%C8%AD%BF%B5%C8%AD+%BF%F8%C1%B6 (30 Jun. 1999).

McAllister, M. P. (1995, April 13). Comic production and control. Paper presented in the Comic Art ad Comics area at the annumal meeting of the Popular Culture Associaion, Philadelphia, PA, 1-34.

McLaren, P.(1995). Critical pedagogy in the age of global capitalism: Some challenges for the educational left. Australian Journal of Education, 39 (10), 5-21.

Motion special: Jeonsa Ryan. (1997, August). Motion, 108-122.

Munwha sesang: Animation geogukjeok gwansim [Culture world: Animation draws national attention]. (1999, Feburay 25). Hankyoreh Shinmun. http://news.naver.com/iiop/news_view?id=270238826&query=%B0%C5%B1%B9%C0%FB+%B0%FC%BD%C9 (30 Jun. 1999).

Munwha sesang: 4wol munyeoneun Seoul animation center [Culture world: Seoul animation center will open in April]. (1999, Feburay 25). Hankyoreh Shinmun. http://news.naver.com/iiop/news_view?id=270238828&query=%BE%D6%B4%CF%B8%DE%C0%CC%BC%C7+%BC%BE%C5%CD/ (30 Jun. 1999).

Nam, W. (1991, March 11). Suip manwha yeongwha "Pokpung Sonyeon": Il jakpum balkyeojeo malsseong [The imported animated movie, "Storm Boy": Turned out to be Japanese movie), Dong-A Ilbo, 8.

Neal-Lunsford, J. (1994). Cel aesthetics: A method for the analysis of animated cartoons. Unpublished Ph.D. dissertation, Indiana University.

Nelson Shin whoejang hangukmanwh segyewha ikkeunda. [C.E.O. Nelson Shin leading Korean cartoons to globalization]. (December 13, 1997). Chosun Ilbo. http://www.chosun.com/w21data/html/news/199712/19971213s191.html/ (30 Jun 1999).

Nielson, M. C. (1988). Labor power and organization in the early U.S. motion picture industry. Film History, 2, (2), 121-131.

Noake, Roger. (1988). Animation techniques. Secaucus, NJ: Chartwell Books.

Nordenstreng, L. & Schiller, I. S. (Eds.). (1979). National sovereignty and international communication. Norwood, N.J. : Ablex Publication.

Oh, Yong Woon. (1996). Cartoon and animation industry as a strategic cultural one. In SICAF Promotion committee (Ed.), Seoul international cartoon and animation festival 95 (pp. 267-272). Seoul: Seoul Munwhasa.

Park, C. (1997, February). The changing winds of Korean animaiotn. Animation World Magazine, 1 (11), http://www.awn.com/mag/issue.11/articles/spark1.11.html. visited on 5/11/97.

Park, J. (1998, August 31). Jayuro munwhabeliro tteunda [Jayuro emerges as a cultural valley]. Joongan Ilbo, B-4.

Park, M.& Song, R. (1996a). Pre-production mit production [Pre-production and production]. In Armageddon Production Committee (Ed.). Armageddon Baekseo [Armageddon White Book], Seoul, 107-156.

Park, M. & Song, R. (1996b). Production mit post-production [Production and post-production]. In Armageddon Production Committee (Ed.). Armageddon Baekseo [Armageddon White Book], Seoul, 181-204.

Park, M. (1998). "Hanguk Aeni, Doyageui Ttaega Watta" (Now is the time for Korean animation), CINE 21, No. 161, http://www.hani.co.kr/c21/data/L980713/ 1gaz7d02.html. (18 Aug. 1998).

Park, S. Y. et al. (1998). Hanguk animation saneopdanji gigeup jindan [Urgent diagnosis of Korean animation industrial complex]. Animatoon, 4, (13). 61-64.

Park, S. H. (1998). Hanguk character saneobgwa geu banghyangseong (Korean character industry and its direction). Animatoon, 4, (14), 80-83.

Park, S. W. (1998, September). Geodae manwhasijang, nuga chegimjilgeosinga [Mega size market, who is going to be responsible?]. Bitgwa sogeum (Light and Salt), 144-145.

Park, Y. (1995a). Armageddon. Animatoon, 1 (1), 64-65.

Park, Y. (1995b). Hon Gil Dong '95, Animatoon, 1 (1), 66-67.

Park, Y. (1995c). Cameramene segye [World of camera men]. Animatoon, 1, (1), 102-103.

Production companies directory. (1995). Animatoon, 1 (2), 86-92.

Pye, L. W. (Ed.). (1963). Communication and political development. Princeton, NJ: Princeton University Press.

Rho, G. W. (1995). Hanguk manwhayeongwha-e gukjehacheong-e gwanhan il yeongu [A study of international subcontracting of Korean animation]. Unpublished master's thesis, Korea University, Seoul, Korea.

Robertson, R. (1992). Globalization: Social theory and global culture. London: Sage Publications.

Rubin, S. (1984). Animation: The art and the industry. Englewood Cliffs, NJ: Prentice Hall.

Sa, G. (1995). Sikdang jongeobwoneseo animation Pdggaji [From restaurent waiter to animation PD]. Animatoon, 1, (1), 96-97.

Saeroun sidoro gwansim moeuneun animation dongarideul [Animaiton amateur production groups]. (1996). Animatoon, 2, (3), 102-103.

Samsung gyeongje yeonguso [Samsung Economy Research Institute]. (1998, August 31). Ilbon daejung munwhagaebange gyeongjejeok hyogwa bunseok [Analysis of economic effects of opening of the Korean market to Japanese popular]. Joongang Ilbo. B-9.

Sasipyi (42)nyeon yeoksa-e gukje animaiton baljeongwa gyoryu-e jang, Annecy '97, MIFA '97 [Annecy 97 and MIFA 97 which have been a field for development and interchange of international animation for 42 years]. (1997). Animatoon, 3, (10). 54-63.

SBSga yeoreogal gongjungpa manwhayeongwha-e gopumjil sidae [The age of high quality animmation that SBS will open]. (1996). Animatoon, 2 (5), 34-37.

Schiller, H. I. (1969). Mass communication and American empire. New York: A.M. Kelly.

Schiller, H. I. (1976). Communication and cultural domination. New York: International Arts and Sciences Press.

Schramm, W. (1964). Mass communication and national development: the role of information and change in the developing countries. Stanford: Stanford University Press.

Segye-e eorini bangsong program gyuje siltae" [World's children's program regulations]. (1996). Animatoon, 2, (4), 10-18.

Seoul-e game center jitgiro [Game center to be established in Seoul]. (1998, December 5). Joongang Ilbo, B-2.

Seoul International Cartoon and Animation Festival 95. (1995). Animatoon, 1, (2). 24-31.

Seoul International Cartoon and Animation Festival 14-21 August 1996. (1997). Animatoon, 3. (8), 92-93.

Shafer, R. J. (1980). A guide to historical method, Belmont, CA: Woodsworth Publishing Company.

Shin, D. J. (1994, March 5). Imi duk-eul neomeo-on ilbon munwha [Overflowed Japanese Cartoons], Gyunghyang Shinmun, 5.

Shin, D. H. (1995). Daebu [Grand Master]. Animatoon. 1 (2), 84-85.

Shin, D. H. (1996). Animationgwa eumak [Animation and music]. Animatoon. 2 (5). 90-91.

Shin Dong Hun Gamdokgwa Hong Gil Dong [Director Dongheon Shin and "Hong Gil Dong"]. (1997, August). Motion. 166-167

Shin, N. (1994, December 22). [Work history – AKOM Production Company]. Unpublished raw data.

Shin, N. (1996a). 35nyeongan animationgwa donggodongrak [Pains and happiness together with animation for 35 years]. Animatoon. 2 (3), 70-71.

Shin, N. (1996b). Hanguk animationeui eojewa oneul, grigo miraereul wihan je-eon (Yesterday and today of Korean animation and suggestions for the future). Animatoon. 2 (5), 79-83.

Shin, N. (1996). Hong Gil Dongsikgwa samuraisik [Hong Gil Dong style and samurai style]. Animatoon. 2. (4), 80-81.

Shin, N. (1997). MIFA '97 chamga—Chosun gwahak yeongwha charyeongsoe manwhayeongwha jejakhyeonwhangeul tonghaeseo bon bukhan animaitone silsang [Particiation in MIFA '97—Reality of the North Korean animation]. Animatoon. 3. (10), 67-68.

Shin, N. (1999, January 18). [AKOM reference data]. Unpublished raw data.

Shin, N., Park, S., Jeon, B., & Shin, J. (1998). Ilbon munwha gaebanggwa urie hyeonsil [Opening to Japanese culture and our reality]. Animatoon. 4, (14), 50-57.

Shin, Y. J. (1999, January 20). [Plus One Ainmation]. Unpublished raw data.

SICAF '96 animation gongmojeon [SICAF'96 animation contest]. (1996). Animatoon, 2 (7). 22-31.

SICAF minganjudoro yeolrineun manwhagwalryeon choedae chukje-e jang Seoul gukje manwha festival '97 [SICAF – the biggest cartoon-related festival Seoul Internatonal Cartoon and Animation Festival]. (1997). Animatoon. 3. (10), 34-37.

Sibil (11)wol 3il manwha-e nalo jeonghae seonpo [Declaration of the day of cartoons in November 3]. (1997, August 23). Hankyoreh Shinmun, 15.

Sito, T. (1988). The Hollywood animation union (M.P.S.C. #839). Animation World Magazine, 3 (4). http://www.awn.com/mag/issue3.4/3.4pages/3.4sito.html, (29 Jul. 1998).

S-MEDICOM home page, http://user.chollian.net/~smedicom/index1-e.html, (9 Mar. 1999).

Solomon, C. & Stark, R. (1983). The complete Kodak animation book. Rochester, NY: Eastman Kodak Company.

Songdo sindosi-e media park joseongdwenda [Media park will be established in the new city of Songdo]. (1997, March 24). Joongang Ilbo. http://www.joongang.co.kr/cgi-bin/sfa?id=19970609103250&query=송도신도시+/ (30 Jun 1999).

Son, S. (1998, September). Manwhajakga mueotbuteo sijakhaeya halgga [What should we start to be a cartoonist]. Bitgwa Sogeum (Light and Salt). 146-149.

Special report: International animation—Big bucks and new rules abroad. (1991, May 27). Variety, 41-75.

Stevens, J. D. & Garcia, H. D. (1980). Communication history, Beverkey Hills, CA: Sage.

Stephenson, R. (1967). Animation in the cinema. New York: A.S. Barnes and Company.

Stevenson, R. L. (1988). Communication, development, and the third world—the global politics of information. New York: Longman.

Sudogwon animaiton jaetaekbueop simnyeon gyeongryeok [10 year career of animation working at home in Seoul area].(1998, February 27). Chosun Ilbo. http://www.chosun.com/w21data/html/news/199802/199802270340.html (30 Jun. 1999).

The Korean domestic cartoons and animation market. (1996, August 16). Yonhap News, 13.

The most influential in international animation. (1998, April). Animation Magazinn, 12, (4), 16-20.

Urinar animatione mekareul chajaseo [Visiting our country's heart of animaiton]. (1995). Animatoon, 1 (1). 35-36.

Urinara jangpyeon manwhayeongwhadeul [Our country's animated features]. (1996). Animatoon, 2 (4). 73-77.

Urin ilbone jayurounga [Are we free from Japan]. (1999, Aril 5). Chosun Ilbo. http://www.chosun.com/w21data/html/news/199904/199904050364.html. (30 Jul. 1999)

Usangwha gyoyuk—TV manwha iyong [Idolizing educaiton – use of television animation]. (1996, May 30). Chosun Ilbo. 15.

Vallas, M. (1997, Septermber). The Korean animation explosion. Animation world magazine, 2.6, http://www.awn.com/mag/issue2.6/2.6pages/2.6vallaskorea.html/ (3 Mar., 1998).

Wallerstein, I. (1974). The modern world system. New York: Academic Press.

Wallerstein, I. (1979). The capitalist world economy. New York: Cambridge University Press.

Whang, J. et al. (1994, February 3). Manwha video geukyeongwha imi anbange: Il daejung munwha eodikkaji deureowa inna [animation video and movies are already in our homes: Up to where does the Japanese popular culture intrude?]. Seoul Shinmun, 11.

Whang, Seon-gil. (1992). Animation yeongwhasa [History of Animation]. Seoul: Baeksusa.

Yeoksajeok inmureul tonhaebon hanguk animation-e baljachi, Shin Dongheon whabaekpyeon [The footprint of Korean animation from the perspective of historic figures: Painter Dongheon Shin]. (1998). Animatoon, 4. (15). 80-81

Yeoreum banghak guknae manwha 3dae geukjang gaebongjak [Three featured animation released in the major three theaters in summer vacation]. (1997, July). Motion, 116-123.

Yeoreum yeongwhasijang [Summer movies market]. (1996, August 23). Chosun Ilbo. http://www.chosun.com/w21data/html/news/199608/199608230183.html/ (30 Jun. 1999)

Yesan: Munwhasaneop yukseong gwansim buyaro busang [Budget: Cultural industry draws attention]. (1998, September 24). Hankyoreh Shinmun. http://news.naver.com/iiop/news_view?id=142934904&query=%B9%AE%C8%AD%BB%EA%BE%F7/ (1 Jun. 1999).

Yi, J. (1995). Hungry Best 5ro mannaneun jeolmeun geudeul [The young ones that we meet through Hungry Best 5], Animatoon, 1 (1), 68-69. .

Yi, J. (1997). Hanguk manwha animation baljeoneul wihan moim [Meeting for the development of Korean comics and animation]. (1998). Animatoon, 4 (12), 68-1.

Yi, J. (1995). Sinariowa kaerikteoga chaeksange itseul ttae deouk haengbokhada [I am much happier when scenario and characters are on the desk]. Animatoon, 1 (2), 94-95.

Yi, S. U. (1997). Michindeusi greumgwa deobureo ilhaetdeon jinannale naro doedora garyeonda [I want to go back to the days when I was frantically working with paintings]. Animatoon, 3 (9), 100-101.

Yi, S. H. (1997, August 1). Il manwha bokje yutong cheot yeongjang [The first arrest of the publishers of the Japanese illegal copies]. Dong-A Ilbo. http://ws.donga.com/fbin/total?n=199708010202&l=55&y=1997&m=8&d=1&code=&id=MIRRID3725870914551 87 (30 Jun. 1999).

Yi, W. H. (1994, February 5). Daejung munwha suyongroneul bomyeo, Hankook Ilbo, 5.

Yi, W. J. (1996). Baegeup: Gwangaegege yeongwhareul [Distribution: animation to audience]. Armageddon baekseo [Armageddon white book], 309-317.

Yi, Y. (1997). TV manwhayeongwhaeui munjeweomgwa gaeseon banghyang [Problems and its solving strategies of television animation]. Animatoon, 3 (9), 93-97.

Yi, Y. B. (1994, December 3). Animation jejak productiondreui choigun donghyang [Recent situation of animation productions]. Paper presented in Forum—Hanguk Animationeui Gilchatgi [Forum-Path-finding of Korean animation], Seoul, Korea, 3-7.

Yi, Y. W. (1996, January 27). Youngwha gwallamseok: Armageddon jakbeop seotureuna himangjuneun gajak [Views from the audience: "Armageddon" is a clumsy but hopful work]. Hankyoreh Shinmun. 12.

Yim, B. (1993a, October 15). Manwha sijang 2: Guksan manwha myeoljong wigi [Cartoon market 2: Annihilation crisis of domestic cartoons]. Hankyoreh Shinmun, 9.

Yim, B. (1993b, October 29). Manwha sijang 3: Yutong gujo byeonwha-e hanguk manwha 'byeorang' [Cartoon market 3: Korean cartoons are on the edge to the change of circulation structure], 10.

Yoon, Y. (1994). Political economy of television broadcasting in south Korea. In C. Kim & J. Lee (Eds.). Elite media amidst mass culture -- A critical look at mass communication in Korea, Seoul: Nanam Publishing House, 191-213.

Youm, K. (1994). Freedom of the press: A legal and ethical perspective. In C. Kim & J. Lee. (Eds.). Elite media amidst mass culture: A critical look at mass communication in Korea, Seoul, Korea: Nanam Publishing House, 65-108.

Yu, S. C. (1997, March 15). Disney tadonaseon JCOM [JCOM raises to defeat Disney]. Chosun Ilbo. http://www.chosun.com/w21data/html/news/199703/199703280117.html (20 Jan. 1999).

Yu, S. J. (1997, December 17). Manwhayeongwha baljakbulleo [Animation brings about convulsions]. Korean Broadcasting System (KBS) 9 o'clock News.

Yun, S. (1995). Hanguk animation saneobe gwanhan yeongu [A study of Korean animation industry]. Unpublished master's thesis, Yonsei University, Seoul, Korea.

APPENDIX

A. DIRECTORY OF KOREAN ANIMATION PRODUCTION COMPANIES

(Korean Animation Producers Association, 1995; Production companies directory, 1995, pp. 86-87; International animation studios directory, 1998, 104-106).

Name	Telephone (dial first 011-822)	Fax
A-One Productions	572-2184	572-2177
AKOM	443-9901	406-8950
Amisong	797-7232/4	797-8919
Ani Art Productions	403-9308	3401-1317
Ani Power	521-8661/2	521-8660
Ani Rom	592-0831/4	592-0835
Ani Vision Korea	522-8523	522-7523
Anik Animation	882-1775	882-1775
Anima Samwon	585-4220	585-4222
Art Max	3673-4475	766-9487
B & Y Productions	3461-5329	573-0379
B29 Enterprise	583-0829	269-9909
Baik Gu Animation	032-428-0247	032-428-0249
Bain Dongwha	852-9901/2	852-9903
Bank Animation	525-4204	525-4206
Big Star Enterprise	579-6302	579-6306

Name	Telephone (dial first 011-822)	Fax
C.D.I.	873-3554	887-5193
Chang Ryun Animation	888-2048	888-2049
CLIC Entertainment	582-8536	582-8263
D-Part Productions	401-7892	403-0853
D.R. Movies	830-0131	830-0133
DNA	3446-4147	3446-4149
Dai Il Dongwha	838-4356/7	838-4948
Dai Won Dongwha	796-7131	790-6084
Do Do Productions	830-6213/4	830-6215
Dong Woo Animation	878-0823	883-1396
Dong Yang Animation	549-2821	544-8125
Dooly Nara	3675-2171	3675-2175
Duri Productions	582-0171	582-0172
Echo Animation	838-7182	867-4301
Eunha Productions	517-5282	517-5283
Film & Works	3415-2112	3486-8114
Gave Media	545-4222	544-3995
Golden Bear Production	3453-5888	3453-6888
Gommuri	572-0651	571-6421
Grimsaem	578-9312	3463-7185

Name	Telephone (dial first 011-822)	Fax
Ha Na Animation	579-4990	579-4991
Ha Na Productions	838-0297	838-0298
Hahn Ho Heung-Up	583-2301	585-7548
Hahn Shin Corporation	564-0341	508-7618
Han Gil Productions	571-5131	571-5134
Han Il Animation	514-1411	514-1412
Han Jin Animation	875-6908	875-6090
Han Sung Animation	511-6145	511-6146
Han Ul Animation	871-0531	871-0532
Han Yang Animation	851-5588	851-4747
Han Young Animation	878-9155	878-9154
Hie Won Animation	523-7966/7	523-7968
Hong Ik Animax	703-2888	707-3873
Hun Film	595-4330	595-4332
Hyo In Animation	831-6285	831-7003
Hyun Young Enterprise	547-9260	545-4827
Ji Woo Animation	859-9080	854-7108
Jin Art Production	522-2567	522-2569
K Productions	885-5505	882-7657

Name	Telephone (dial first 011-822)	Fax
KODECO	508-4141	508-4145
Ko Ko Entertainment	516-8153	544-8126
Korea Ani	517-4226	540-3556
Korean Animation Producers Association	587-9801	587-9802
Korean Cartoonists Association	701-1914	702-1983
Kyeosung Production	875-1153/6	875-1154
Kyung Kang Animation	839-4071/2	839-4070
Lee Productions	858-3822	858-3821
Live Media	567-2330	567-2303
Munsung Animation	868-6133	868-6135
Odoltogi	592-6443	592-6650
Orange Animation Studio	879-1058	879-1059
Park Productions	846-1243	846-1244
Park Young Production	3446-3416	3446-3318
Plus One Productions	858-9120	858-9122
Point Productions	887-8605	886-6473
Rainbow Productions	425-4097	425-0697
Rough Draft KOREA	571-4871	571-4870

Name	Telephone (dial first 011-822)	Fax
S Y Animation	583-0053	583-0059
Sae Han Productions	525-3401	525-3403
Sae Young Anitel	889-8474	871-5402
Sae Young Dongwha	854-2255	862-9839
Saerom Productions	538-6320	538-6326
Sam Il Dongwha	595-4071	595-4075
Sam Se Dongwha	878-6085	878-6086
Sam Won Dongwha	585-4220	585-4222
Sem Animation.	597-1548	598-1687
Seong San Giwhoek	872-0278	872-0279
Seoul Dove	3442-5370	3442-5371
Seoul Kids	852-2987	852-2989
Seoul Movies	3444-3276	3444-3279
Shin Woo Animation	338-4700	338-4706
ShinYoung Animation	872-8551	872-8552
Shund Productions	404-5579	404-9319
Sun Min Animation	571-7881	571-8923
Sun Woo Animation	504-4464	504-3706
Sun Woo Digital International	566-1060	501-3096

Name	Telephone (dial first 011-822)	Fax
Sung Bo Animation	884-7036	884-7037
Sung Productions	856-0072	858-5186
Sung San Animation	872-0278	872-0279
T Productions	884-0502	884-0512
Teams Art	884-0849	873-8541
Touch & View	3463-2961	3463-2965
U-Jin Animation	517-5282	517-5283
U-Ni Animation	501-3501	501-3550
Unimation World	878-9155	878-9154
White Line Animation	872-4674	871-4674
Won Productions	859-8316	859-8318
Woo In Productions	525-6425	525-6427
Yae Rim Animation	874-2367	872-8915
Yae Sung Animation	571-0971	3461-3692
Yireh Animation	571-1242	575-7864
Yong Woo Productions	521-5451	521-5453
Youjung Animation	574-0698	3461-1923
Young Productions	531-5645	539-4461

B. COMPUTER ANIMATION PRODUCTION COMPANIES

Name	Telephone (dial first 011-822)	Fax
Animan	515-1245	516-7844
BISONTEK	516-4221	516-4226
Blue Line	3442-4668	3442-6736
C & D Techart	544-4747	544-0860
CAARS SYSTEM	443-9901	406-8950
CGI	515-0123	515-0125
CID	202-3167	202-3169
Canvas	512-3188	518-5507
Computer Graphics Lab	556-3052	564-1795
Dong Yang Computer	569-0411	568-0311
Jero One Pictures	574-0243	579-9568
Jin Young Technology	565-2015	568-2250
Korea CAD Engineering	565-6621	3452-5115
LIM	512-3188	518-5007
Paradigm	875-6966	874-8959
Sun Woo Digital International	566-1060	501-3096
Technopic	579-7594	579-7592
Woo Joo Precision Co., Ltd.	564-7576	555-6136