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Globalization of Japanese Culture: Economic Power vs. Cultural Power, 1989–2002

DAL YONG JIN

ABSTRACT *This article examines the reasons why Japanese cultural products have not penetrated other countries. It also explicates the recent trends in Japan's expansion of its cultural products and Japan's direct investment in the global cultural market to ascertain whether this new development is a sign that Japan is attempting to gain an important role in global communication. It concludes that Japan was not able to successfully build its communication power to a degree comparable to its status as the second largest economic power and its second largest media consumption market.*

Keywords: cultural power, cultural market, cultural products trade, international communication, Japan.

Introduction

The Japanese cultural involvement in the global cultural market has grown gradually, beginning in the late 1980s. From animation to comics and films, Japanese popular culture has been received in many parts of the world. Japanese television dramas such as *Long Vacation* and *Love Generation* have been embraced in several East Asian countries. *Sailormoon* and *Pokémon* have become a global phenomenon, and the animated film *Sen to Chihiro no Kamikakushi* won the best film award at the Berlin Film Festival in 2002. As Koichi Iwabuchi points out, these developments seem to be signals of growing Japanese cultural power in the global cultural market, and would be enough to attract considerable attention, at least within Japan.¹ Indeed, the increasing role of Japanese cultural influences over the last 15 years has been the subject of a number of studies, in particular by Japanese media scholars who have studied some exceptionally successful television program export phenomena, such as *Shogun*, *Oshin*, and *Sailormoon*.

Regardless of the several successful stories of Japanese reinvention of cultural products, there is no convergence in views on Japan's role in the global cultural market because Japanese cultural products have not played a significant role, apart from a few exceptions. Japan barely continues to produce cultural products comparable to the huge success of *Sailormoon* and *Pokémon*. Moreover, Japanese cultural power is not comparable to its level of economic power. Japanese cultural

power as measured by the magnitude of the export of audio-visual products, including television programs, films, and music, falls far short of its economic power in terms of gross domestic product (GDP) and the volume of export of high-tech products.²

This article examines the reasons why Japanese cultural products have not penetrated other countries, either Western or East Asian countries. It investigates economic, cultural and historical issues, since this background substantially affects an individual's choices of foreign cultural programs. It also explores the recent trends of Japan's attempts to expand its cultural products, including Japan's direct investment in foreign countries, to ascertain whether this new trend is a sign that Japan is attempting to extend its role in the global cultural market. Finally, it discusses whether Japan can build up its cultural power to a level comparable with its economic power in the near future by examining the impact of the economic recession in Japan as well as political factors on production and trade of cultural products.

Japan's Economic Capital vs. Cultural Capital in the Global Era

A country's cultural power mainly depends on its economic power. As Nicholas Garnham points out, the amount of resources made available for communication is determined by the amount of economic surplus in general.³ Due to economies of scale, small countries can support fewer nationally produced media products than large ones. The amount of media sustainable under market conditions is in general determined both by the level of disposable income and resulting consumer expenditures, and by the level of advertising support.⁴

More specifically, in order to investigate the economic systems in the world, especially as regards production of television programs, several indicators of the size of a national cultural market should be considered, including the number of television viewers and market revenues as well as the diffusion of VCRs.⁵ These factors are indispensable because they determine the value of a given audience size to an advertiser or pay channels. In analyzing Japan's role in the global cultural market, I begin with a brief review of Japanese economic power, and then discuss the Japanese cultural consumption market.

The Japanese economic system has experienced times of glory in the world over the last several decades. Japan's GDP stood in second place with \$4.75 trillion in 2001, and Japan was the world's second largest exporter of high-technology products. In the 1998–99 fiscal year, Japan exported \$126 billion worth of high-tech products, just behind the US with \$206 billion.⁶ In addition, Japan boasts the second largest cultural consumption market in the world. Japan's television broadcasting market revenues in 1997 were \$17.8 billion, only behind the US with \$48 billion.⁷ Japan's import of television programming grows year by year. Foreign music and films overflow in Japan. Japan was also the world's second largest advertising market at \$46 billion in 2001.

In the meantime, the national communication market size, such as the penetration of television viewers and VCRs, shows that Japan is one of the most developed countries. Japan's TV viewers numbered as many as 86 million and ranked third in 1997, and the diffusion of VCRs correlated positively with the country's levels of general economic development. The degree of VCR penetration into Japan stood at 77.8% in 1999, while the penetrations rate in other East Asian countries was under 70%, and second only to the US.⁸ Judging from the market revenues in TV broad-

casting, VCR penetration rate, and TV viewers as well as its economic power, there is no doubt Japan is one of the largest and most well-developed countries in the world.

Japanese cultural products, however, have hardly penetrated worldwide to the same degree as its economic power and the domestic cultural market. Japan's revenue from cultural product exports is relatively low compared to other Western countries and several East Asian countries. As Gregory Noble argues, the Japanese television program trade, for instance, still remains marginal in the global cultural market.⁹ The general notion that cultural power is quite comparable to economic power does not seem to be applicable in the case of Japanese cultural influence in the global cultural market.

Japanese Cultural Product Flow in the World

The US has maintained the world's leading position in television programs and film trade. Although there are several emerging domestic companies in many cultural industries, the global export market is the province of a handful of mostly US-owned or US-based firms.¹⁰ According to the US Bureau of Economic Analysis, US film and television program exports were valued at slightly over \$1 billion in 1985.¹¹ However, the US exported about \$9.1 billion to the world in 2001.¹² Most of this increase could be attributed to greater exports of US television programs to new channels in foreign countries.

US exports, in particular, increased 175% in East Asian countries between 1992 and 1999, with the vast majority of US television exports to East Asia being to Japan. The country imported \$579 million worth of US films and television programs in 1999. The Japanese market comprised 63% of the US film and television program exports to the East Asian region in 1999. In the same year, Japan exported only \$16 million of film and television programs to the US, and it comprised only 26% of East Asia's export to America. These figures reflect the well-developed television system and the capacity of Japanese broadcasters to pay high prices for US programs.¹³

International trade in audio-visual services shows a similar pattern.¹⁴ The US maintained the leading position in the audio-visual service trade in the world in the 1990s, as it had for several decades. According to the Organization for Economic Cooperation and Development (OECD) and Eurostat, the US revenues from audio-visual services were \$3.6 billion in 1997, followed by France, England, and Canada. Japan's revenues were only \$235 million in this field, which was far behind other OECD countries, including Italy (\$445 million), Belgium (\$395 million), and Spain (\$350 million).¹⁵

Japan began to extend its exports of several television programs to the global cultural market beginning in the early 1990s. The most successful Japanese cultural product was the television cartoon series *Sailormoon*, which debuted in the US in the fall of 1995. By that time, it was already the number one children's action adventure television show in Japan, France, Italy, and Hong Kong, and was also aired in Taiwan and Korea.¹⁶ *Sailormoon* has also been made into a musical, a film, and best selling videos, laser disks, CDs and game versions. The Japanese cartoon and video game franchise *Pokémon*, another famous Japanese animation was broadcast in 65 countries and translated into more than 30 languages.¹⁷

Japanese broadcasters and production companies intensified plans to sell programs at international media fairs. Japan Entertainment Television (JET), a joint venture between the key station Tokyo Broadcasting System (TBS) and Jupiter

Telecom, for the first time in history, began a commercial effort to sell Japanese programs abroad in 1997. An office in Hong Kong translated many of the programs into Chinese, English, and Thai for transmission from Singapore.¹⁸ The main pattern of this changing role of Japanese cultural products was possible with the rapid development of new technologies such as cable TV and satellite TV worldwide. Indeed, recent authorization of commercial cable TV in East Asian countries has resulted in a rapid increase in the number of foreign programs including Japanese programs. Commercial television networks in East Asia are usually under governmental control and bound by strict restrictions regarding TV programs. Overseas programs were restricted to less than 30 and 20% in Taiwan and Korea, respectively, until the early 1990s. Unlike terrestrial television, cable television has much more room to broadcast foreign programs. Since the authorization of cable television in Taiwan in 1993, about 103 cable TV operators have broadcast programs, which were mostly received via such foreign satellite broadcasting services as Star TV (Hong Kong) and NHK (Japan Broadcasting Corporation) in 1998. The Korean government has partially opened its cultural markets for Japan in recent years. As a result, Japan seems to enjoy a greater cultural superpower status today than it did in the 1980s, when it was only an economic superpower, as Douglas McGray points out.¹⁹

Japanese television program exports, however, are not significant worldwide because Japan has not succeeded in expanding further programs beyond these few successful programs. In fact, the increased figures for Japanese television programming were heavily dependent upon a handful of programs. For example, Japan exported \$19 million worth of television programs to the US in 1996, as opposed to \$6 million in 1995, mainly because of the great success of *Sailormoon*. The amount of Japanese exports to the US, however, dropped to \$8 million (1997) and \$7 million (1998), respectively. With the success of *Pokémon*, the total export of Japanese television programs soared to \$38 million in 2000, but it again plunged to \$12 million in 2001, while Japan imported \$819 million worth of US film and television programs.²⁰

The Rise and Fall of the Japanese Cultural Power in the 1990s

One of the most significant trends of Japanese cultural penetration beginning in the late 1980s was direct investment in Hollywood. Many Japanese cultural industries directly invested their money in the world market, including Hollywood. Sony penetrated the US market by buying Columbia Pictures Entertainment, Inc. for \$3.4 billion on 7 November 1989, because Sony wanted to be an integrated producer of consumer electronics products. Although Sony was top ranked in electronic hardware products worldwide, it needed strong software.²¹ Akio Morita, the chairman of Sony, stated in 1989 that as industry developed new electronics products—video tape, videodisks, high-definition television, satellite and cable broadcasting—so software would have to be produced to match them.²² Sony's effort to break into the film and television industry in the US was unsuccessful. Sony's purchase of Columbia aroused strong passions among politicians and media in the US, who condemned Sony's bid as an invasion. Many Americans saw the proposed deal as negative and claimed that the acquisition of one of the symbols of American culture was the equivalent of buying a part of America's soul.

Sony wasted a great deal of money and ended up with a studio, but without the broadcast and cable channels that Time-Warner, Disney, Viacom and News Corp. all

have. Japanese ownership prevented it from setting up a broadcasting network. For Sony, globalization is hardly new; but for Sony film and television business is new. The content side of the business is still a Hollywood studio, and studios regard America as the center of the world.²³ Sony, therefore, has diverted its focus to other countries. The company decided to internationalize its production because American programming was being edged out in favor of locally produced programs. Sony now has 24 TV channels in 62 countries and production facilities all over Asia and Latin America, while it is launching channels in Europe. Some Sony channels are proving to be remarkably successful. Sony Entertainment Television in India, for example, is neck-and-neck in the ratings with Zee, India's most popular commercial channel.

With the purchase of MCA Inc. for \$6.9 billion in 1991, Japan's Matsushita Electronics Industrial Corporation also became the newest foreign owner of a Hollywood studio. Matsushita pursued the same concept as Sony, wanting to control the movies, TV shows and music that viewers play on their VCRs, TV sets and stereo systems. Moreover, it would be easier for manufacturers to sell new audio and video equipment—such as high-definition televisions or laser disks—if they could also offer software, which could include anything from *Lawrence of Arabia* to the latest Michael Jackson video.²⁴

These efforts by Japanese cultural industries to purchase non-Japanese media were possible due in part to its economic power, but also, advanced globalization by making aggressive investments as the yen became stronger.²⁵ The Japanese realize that buying shares in a Hollywood studio can mean reaching not only American and Japanese audiences but also tens of millions of people around the world.

This investment in the global cultural market would not be sustainable during the 1990s because of the economic recession in Japan. Matsushita sold most parts of MCA to the Canadian beverage giant Seagram Corporation in 1995 during the Japanese recession.²⁶ Hitachi, one of Japan's largest and richest electronics companies, cancelled its plan for investment in Hollywood.²⁷

Economic reasons were not the only factors in the failed investments in Hollywood. Cultural conflict and anti-Japanese sentiments also posed major hurdles. The basic, deep-seated ignorance among the Japanese about how Hollywood works caused problems. As Richard Essex, managing partner in the investment firm Essex, Eng & Shapiro, pointed out, Japanese industry is not nearly as sophisticated as America's.²⁸ The world market for their movies is small, and they don't really understand how to go from story to production to theatrical distribution to selling ancillary rights.

Reasons for the Weakness of Japanese Cultural Power

Japan has a hard time in establishing its cultural power, although it has extended its exports of cultural products and direct investments in other countries. There are several reasons for the weakness of Japanese cultural power—political and economic as well as cultural reasons: Japan's experience of colonialism; the US's cultural dominance; language and limited diasporas; and the paucity of government cultural policy.

The most crucial obstacle is Japan's own legacy of colonialism and military occupation.²⁹ Asian governments are highly sensitive to the threat of a Japanese cultural invasion nearly 60 years after the end of World War II. NHK's effort to create the Global News Network in the early 1990s failed partially because of fears

among other Asian nations of cultural domination by their one-time colonial occupier; these nations imposed restrictions, which, in the words of NHK chairman Mikio Kawaguchi, made it 'quite questionable whether we can get enough news'.³⁰ NHK also had to narrow the footprint of its satellite broadcasts when Taiwan and Korea complained of cultural invasion.

Korea, China, and Taiwan are strongly concerned about another kind of Japanese colonialism. This is primarily because these countries underwent the negative experiences of Japanese occupation and war with Japan. The government of Taiwan has taken a negative stance toward Japanese culture, which is understandable, given Japan's earlier colonial rule over Taiwan.³¹ Korean television traditionally limited its portrayals of Japanese, with strong anti-Japanese sentiments stemming from Japan's colonial rule of Korea from 1910 to 1945, cited as the reason. However, the ban has also been justified by the need to protect young Koreans from the perceived corrupting influence of violent and pornographic Japanese entertainment.³² Japanese commercial television broadcasters air several pornographic programs, and the conservative Korean government worries about its potential influence.

However, the situation has changed gradually, as recent deregulation in Korea, Taiwan, and China in the 1990s has resulted in an increase in the number of foreign programs in East Asia. The Taiwanese government partially lifted the ban against Japanese television programs at the end of 1993, and Japanese culture has gradually begun to gain more influence, in particular, in cable television.³³ Since 1989, the Korean government has gradually opened the gates for several cultural products, including Japanese pop music, limited films, animation, and computer software games. They had all been officially banned as punitive steps against Japan's colonization of the Korean peninsula.³⁴

Despite East Asian countries' recent lifting of the ban against Japanese cultural products, Japanese programs have not been totally immune to criticism and opposition from audiences in East Asian countries. For example, in December 1994, a group of actors and actresses objected to the broadcast of Japanese programs during prime time in Taiwan. As a result, the terrestrial TV stations voluntarily agreed not to broadcast Japanese programs during that time slot.³⁵ In July 2001, the Korean government announced it would indefinitely suspend the opening of the Korean cultural markets to Japanese cultural products because Japan promoted erroneous or fallacious accounts of historical events in its newly published history textbooks and refused to revise them.³⁶

Meanwhile, the US cultural dominance of East Asian countries functioned as the fundamental obstacle to Japanese cultural penetration in East Asia. As noted, US media giants have dominated this region over the past several decades. As US political leaders have insisted, even if proportionately diminishing, the US has retained far too great a stake in Asian markets to accept a radical diminution of its role there—especially in light of these nations' unrivaled growth rates and vast populations.³⁷ The dominance of the US media giant worldwide will increase with the information revolution. The idea of the Global Information Infrastructure (GII) in America is to create an English-based system on a global scale with the advantage of superiority in information technology, thereby maintaining a dollar-based economic system.³⁸ The Internet is spreading the English-language information to the world, so other countries, including Japan have lost the chance to promote their languages and cultures, regardless of their leading roles in the high-technology sector. English was used in almost 80% of websites and in the common user interfaces—graphics and instructions in 1999.³⁹

Indeed, language plays an important role in spreading cultural products to the world because language and culture seem to be significant moderators of the flow of television programs between countries.⁴⁰ Cultural identity and language tend to favor an audience's desire for cultural proximity, which leads audiences to prefer local and national productions to those that are globalized and/or Americanized. However, those who use Japanese in East Asia are of the older generations, which usually have little power to select programs. The younger generation prefers to study English, and has comparable power to select foreign programs. Most Japanese programs, therefore, have failed to grasp audience attention in the global television and film markets, although several programs, including *Shogun* and *Sailormoon* have been translated into several languages. The Japanese language loses its grip as the lingua franca of the region, as English and Chinese are gaining more popularity in East Asia.⁴¹

In addition, East Asia's diaspora partially explains the weakness of Japanese cultural trade. In the early 1990s, the cultural products of most East Asian countries usually went to ethnic Asians. Chinese television program sales have been most active in the markets with large ethnic Chinese populations, such as Taiwan and Hong Kong.⁴² Demand from the ethnic Chinese community in Southeast Asia has underpinned the expansion of Asian regional firms, primarily TVB, but also newer firms, such as Hong Kong-based China Entertainment Television Broadcasting and Television Corporation of Singapore.⁴³ Many East Asian television programs have also been imported in the US in the format of videotapes, which are usually bought by ethnic Asians.

This is not the case for Japan because small numbers of Japanese have immigrated to other countries in the latter part of the twentieth century. According to the US Census Bureau, only 93,300 Japanese immigrated to the US between 1980 and 1998, in comparison to 735,500 Chinese and 481,000 Korean immigrants during the same period. Korean and Chinese immigrants from the 1960s to 1980s increased by a factor of 9.46 and 4, respectively. In contrast, Japanese immigrants increased only by 12.2% during the same period, and Japanese immigrants in the US number far less than Hong Kong immigrants.⁴⁴ The overwhelming majority of the world's Japanese-speaking population resides in Japan—a factor likely reducing Japan's role as a television program and film exporter.

Finally, the Japanese government does not promote the export of cultural services, unlike other East Asian countries, which eagerly support television program exports. The Japanese government does not have any official documents on the trade volume of television and film exports. Government officials state that they do not receive and document any data for those sectors because they are service fields, while they traditionally solicit information of commercial goods.⁴⁵ The government's annual white paper also does not include information about the television program trade.

As a matter of fact, Japanese television companies as well as the Japanese government did not promote sales of their cultural programs until the early 1990s. NHK provided programming to only small numbers of viewers in North America, Europe, and Asia in the 1990s.⁴⁶ NHK takes primary responsibility for providing Japanese programs abroad by the Broadcasting Law and NHK's charter.⁴⁷ According to these, one of the main missions and tasks of NHK is to furnish programming to foreign audiences and Japanese living abroad.⁴⁸ However, NHK cannot extend this obligation because it is supported by a reception fee from the public, and it has to focus on domestic broadcasting such as (1) providing universal

service throughout Japan; (2) broadcasting both national and local programming; and (3) contributing to increasing the nation's cultural level instead of extending programming exports. In sum, the Japanese government does not much concern itself with the growth of cultural products. Japan is interested in electronic hardware such as TV sets, VCRs, and computers rather than cultural products such as television programs and films, with few exceptions.

Discussion

As can be seen, the role of Japanese cultural power in the global cultural market is gradually growing. From television dramas to animation, Japanese cultural products have increased in their influence in international communication over the past decades. Japanese cultural industries have also partially penetrated the Asian markets as well as Western countries. These recent trends, however, do not sufficiently confirm that Japan is developing its cultural power to an extent comparable to its economic power and the magnitude of its domestic cultural market. Regardless of several well-received cultural goods, Japan falters in identifying and maintaining its role in the global cultural market because of limitations of successful cultural goods. Japanese cultural goods and services are far behind those of several Western countries. Views differ widely as to underlying and proximate causes of the relatively weak Japanese cultural power. Blame has been laid on, among others, historical and political factors, the decade-long string of economic recessions, and the excessive US dominance in the cultural market in Asian countries as well as other areas. Japanese cultural power is not comparable to its status as the world's second largest economy and communication consumption market.

Japanese cultural power will be further blocked by several East Asian countries, including Korea and China, because what the governments of these nations fear is not only a threat to a national cultural identity, but also the exposure of their people to the ways of life in other parts of the world. Meanwhile, Western countries, which harbor some anti-Japanese sentiments, do not welcome Japanese cultural products mainly because of cultural conflict rather than issues of colonialism.

It is evident that political factors play a role in broadcast television program production and its export to East Asian countries. As noted, the Japanese government does not subsidize its cultural industries unlike other countries, including Mexico and Brazil. In these countries, the development of strong native film and television industries can be achieved through a combination of responsible planning, regulation for the sole sake of development, subsidies and industry-wide commitment to progress.⁴⁹ The development of indigenous film and television production industries is the task and the responsibility of the nation. However, the Japanese government does not plan to initiate development of cultural industries, but wants to allow the media companies to handle cultural products' production and trade. There is no sign of the Japanese government's involvement in cultural products trade, partly because Japan is afraid of the potential infringement of freedom of the press.

As regards Japanese cultural politics, there is only a slight possibility that Japanese cultural products would penetrate worldwide within at least 10 years, mainly because the Japanese economy is still in its worst economic recession. For the Japanese government, cultural product development and export are not a high priority. After the recovery of its economy, Japan's second major priority is

preparing for the silver society. In 2020, one out of four Japanese will be over 65 years old, which will mean that Japan will be the most aged of the advanced economies, burdened with a hitherto unparalleled social security obligation.⁵⁰

The Japanese high-tech predominance does not entail the assumption that Japanese cultural products will penetrate markets with its high-tech hardware because Japan is not the only country to develop advanced technologies. The economy of the advanced world has passed the stage of labor intensification to become definitely more knowledge-intensive. Several East Asian countries, including Korea, Taiwan, and Singapore, are catching up with the new technology of Japan. Japan and Korea are major rivals in several areas including the high technology sector. Although Korea welcomes Japan's technological transfers and investment, Korea has no intention whatsoever of becoming a dumping market for Japan's products.

Finally, the US has a superior position in the area of information technology such as information networks, software and such, where it can take the initiative. Even in the area of semiconductor technology where Japanese companies excel, the American companies are better in central processing units (CPU), and it is the Americans who establish the technology standards.⁵¹ In conclusion, Japan will be on the edge of the global cultural business in the near future. Although Japan has expanded its exports of audio-visual products and direct investments in other countries, its role will not be significant compared to its economic power and to other emerging countries in Latin America and East Asia.

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