

# Creative Industries in East and Southeast Asia Report

## INTRODUCTION

The Creative Industries in East and Southeast Asia Symposium, held in London at the Japan Foundation and Richmix, opened on Friday 29th and closed on Saturday 30th of June 2012. This international event was co-organised by the Centre for Media, Culture and Creative Practice (Birkbeck College) and the Japan Foundation in London. The Symposium opened with a welcome speech by the General Director of the Japan Foundation in London Mr Tsuyoshi Takahashi to which followed an introduction by the moderator Dr Oyama Shinji (Birkbeck College).

In his introduction, Dr Oyama highlighted the increasing importance of the Creative Industries in East and Southeast Asia. Mainly for economic reasons, many Asian countries are trying to move up the global value chain to turn their economy into creative economies. Their focus is therefore no longer exclusively on manufacturing, but also on creativity and culture. In these developments they are not only competing with 'Western' countries, Asian countries are also competing against each other and working with each other. Since 2008, the year of the collapse of Lehman Brothers and the following global economic crisis, these relationships have grown stronger and deeper. For example, in 2010, for the first time in modern history, China surpassed the US to become Japan's largest trading partner. Similar trends of inter-Asian economic relationships are also emerging in the rest of the region, especially in the cultural domain, where the flow of media and cultural products is increasingly growing and intensifying. These regional dynamics are not usually discussed in London, where it is most common to debate on similar topics in relation to single countries. However, it is important to understand how globalisation also works through supra-national regional forces. For this reason, the conference focused on East and Southeast Asia rather than adopting a single national focus.

The speakers addressed various issues, opportunities and contradictions of the creative industries in Asia. Professor Anthony Fung (Chinese University of Hong Kong) talked about the dilemma faced by the Chinese government between economic profitability and ideological control. Professor Mōri Yoshitaka (Tokyo University of the Arts) addressed, among other things, the Government-led "Cool Japan" ideology and the difficulties of those young people who are expected to drive the Japanese creative economy. In the afternoon session, Dr Kim Yeran (Kwangwoon University) and Professor Kim Eunmee (Seoul National University) explored the meaning of creativity in the Korean creative industries, which are extremely successful in the Asian region. Dr Lorraine Lim's presentation on Singapore's cultural policies illuminated the issues linked to the government's need of nurturing creativity in order to develop its economy.

Each of the speaker reflected on the way the very idea of the creative industries as a discourse and as a set of policies originally developed in the UK, is localised, reworked and given new life according to the different social and cultural contexts of East and Southeast Asia. This symposium has opened up a space for further study of this area.

## PRESENTATIONS

### 1. Dr Anthony Fung: *Creative Industries in China: Contradictions and Globalization.*

Dr Fung's speech considered as a case study four media-related creative industries in China: animation and comics, music, film and the online games industry.

For the Chinese Government, the creative sector represents a double-faced dimension: an opportunity of both market profitability and political control through the circulation of Nation-State ideologies. These two dimensions are of course in contrast. On the one hand, the creative industries rely on global investments and international partnerships to enhance the national GDP and improve the local “know-how”. On the other hand, they are also related to political power and the interest of the Government to disseminate ideological control through the media.

The State controls the Content Industry through the Administration Agency of Radio, Film and Television. The ideological control consists of three main elements: propaganda, indoctrination and education. The content and the diversity of what is produced by the creative industries is therefore limited. The higher the control, the less the freedom; the less the freedom, the less the marketability of cultural products. The higher the globalisation of the national creative industries, the less the ideological control the Government can exercise. This is the dilemma of the Chinese Government: the inseparability of profit and political control.

Among those considered in this speech, the industries of comics and animation are the least successful creative industries in China. There are no big production companies and they have never gained international recognition, nor reached foreign markets. In the 1980s the import of animation from other countries increased. As a reaction, the Government tried to discourage foreign imports and to encourage the local industry, which, however, could not compete with foreign productions. With the introduction of Japanese anime like *Sailor Moon*, this project proved to be a failure as the audience continued to prefer foreign products. In 2005/2009, the Government interventions achieved for the first time a certain success in the internal market, even though not enough to promote exports abroad. *Happy Lamb and Grey Wolf* (2004) is one example, and Disney was quick to acquire its copyrights for its potential marketability. In this work, the Chinese state ideology is subtly reflected in the story about the life of anthropomorphic animals, as predators and prey live in a thoroughly harmonic world in which difference and inequalities in their conditions of life are rendered invisible.

Music represents the most successful creative industry in China. Before 1949, many foreign companies participated in the development of a Chinese music market. This was possible because foreign firms did not oppose the Chinese State. Music was therefore used as a propaganda tool even when collaborating with global firms (e.g. EMI distributed in China the record of the national anthem). The major global record industries (the ‘big 5’, now ‘big 4’) were all operative in China. This produced a tendency towards joint-ventures and a symbiosis between the Government and the industries. Hybrid companies produce hybrid music in China (e.g. Sony, Universal, etc.). The form tends to be ‘Western’, the content remains mainly Chinese. As global industries also have branches in Taiwan and Hong Kong, they also import music from these countries to China. Chinese traditional music elements and singers are therefore not as popular as what arrives from Taiwan or Hong Kong. If the cultural aesthetic developed in this way is very much ‘global’, an advantage of this approach is that the local industries have the opportunity to develop thanks to the foreign investments.

The film industry has been always monopolized and controlled by the Government, as the film medium in China has been always considered an ideological and political tool, rather than a commercial product. It often shows propagandist contents. The ideological element in this industry prevents Chinese Cinema from becoming globally successful. As the Chinese authorities do not encourage foreign groups to invest in China, globalization and exports in this sector are unsurprisingly limited. Recently, something has slowly started to change. The increasing participation of foreign capitals in the Chinese Film Industry has helped the transition from a thoroughly state-owned model to the capitalist market model required by the WTO. This impulse towards foreign investments, however, proved to be only a discontinuous engagement for the Chinese Government, which remains mainly concerned

with the production of big blockbusters charged with ideological and nationalist content. This strategy prevented exports in favour of the internal market.

The Game Industry is the least Government supported industry (no interference) and it has been influenced by the South Korean game industry model. So far it is the most successful Chinese cultural industry, and at the same time the one with the most freedom from the state. This is partly because of its young age: from its very beginnings, the game industry started as a free private enterprise. The State, on its part, underestimated the potential of this medium and left the industry in a state of great autonomy for a long time. Recently, control by the authorities has extended but it is still more relaxed in comparison to other cultural sectors. This is also the biggest of the 4 industries considered here. It has great potential as the games market seems to be growing everywhere (e.g. Korea). The establishment of a wide local market in China has paved the way for the contemporary introduction of many products and foreign investments. What the industry did for a long time was to adapt and modify other Asian products into local products. As technology is not as developed and games are very local, exports are still not successful.

To conclude, the creative sector represents for the Chinese Government a double dilemma, of local culture vs cultural globalisation and of nationalism vs global capitals and freedom. In order to be appealing, the Chinese industries have to accept global influences and capitals, but in this way it becomes more difficult for the authorities to 'filter' the ideological content of cultural products.

## **2. Prof Yoshitaka Mouri: *Creative Industries in Japan and their Discontents.***

Creative Industries became a buzzword in the mid-nineties thanks to Tony Blair and his Cool Britannia project. In Japan, the word creative industries is primarily an administrative term which the government use and promotes, especially through the work of the Ministry of Economy, Trade and Industry (METI). Its definition of Creative Industries, however, is very broad and ambiguous, including, alongside fashion, music, film, design or animation, industries as different and diverse as those of cosmetics, furniture, tableware, jewellery, stationery and leather.

Until very recently the Government did not intervene too much in the Content Industries. The establishment, in June 2010, of the "Creative Industries Promotion Office" under the METI Manufacturing Industries Bureau, however, signaled a change in the government strategies towards the creative sector, now perceived as crucial for the project of national economic rejuvenation and growth. This is in line with the long-term project of "Cool Japan", a strategy for the promotion of overseas tourism, national 'soft power' and economic growth. According to the Government, the gross revenue of the creative industries in Japan amounts to 45.2 trillion of Japanese Yen (that is approximately £377 billion in the UK). However, there is a gap between the Government interest in exploiting the Cultural Industries to increase its soft power in a global market, and the interests of the Content Industries in participating in this project, given that they mostly rely on the domestic market or on global but subcultural niche markets.

To understand this gap, it is necessary to look at the historical passage from culture to creative industries. According to Mouri, there is a difference between Adorno and Horkheimer's concept of the culture industry and today's creative industries. For the German philosophers, mass culture was not only a new industry, but also an ideological apparatus that penetrates society through media and mass communication. Unlike their culture industry, however, today's creative industries do not homogenize and standardize the people's way of thinking. 'Think Different' is not only Apple's campaign slogan, but a slogan in every industry. It is the response to post-Fordist modes of production, from the hegemonic role of

manufacturing to immaterial products, information, media, services, communication, knowledge; in a word: creativity. Creative industry is also a response to the neo-liberal market economy which emphasises individual responsibility in the organisation of labour. This often translates in profound inequalities in the conditions of life of many people involved in these industries. One striking example is provided by Japanese animators. According to data collected in 2005, Japanese animators face very harsh labour conditions, working more than 10 hours per day 25 days per month, just to receive the monthly payment of 94000Y (around 7,080£). 44.3% of Japanese Animators are in their 20s and the 39.9% of them quit within the first 5 years. This is a typical form of exploitation of emotional and affective labour, the dark side of the success of the Japanese nation trumpeted by the rhetoric of 'Cool Japan'.

The creative industries show us the new role of governments in the age of globalisation. Differently from China, the Japanese government is not so much interested in disseminating ideologies through media than in making economic and symbolic (soft power) profit out of its industries. One of the problems of the 'creative industries' is that it easily widens the gap between those who are engaged in creative labor and those who are not within these industries. It is very important for the government to find a way of redistributing profits to maintain creative production as sustainable. The other problem is that, as Richard Florida suggested, one of the most important conditions for the development of the creative industries is 'tolerance'. The creative industries need diversities of gender, ethnicities and ideologies. But the 'Cool Japan' project seems to stick to the idea of Japan as a homogeneous nation, lacking internal diversities. The 'Cool Japan' project has to face 'tolerance' and inclusiveness of minorities, and the Japanese Government needs to transform this into a broader social educational project, not only economic as it is today.

### **3. Dr Yeran Kim and Prof Eunmee Kim: *What is 'Creative' about Korean creative industries?***

This presentation introduced a new way of understanding the recent growth of South Korean creative industries and their influence in East and Southeast Asia. In the past, discussions about South Korean creative industries maintained a local and Korean-centered perspective, focusing on policy and mainly analysed Korean pop music. Now views have extended and consider the creative industries as a whole, which are discussed as a more complex and outward looking environment. While studies have relatively ignored the importance of human activity and social interaction in creativity development, this paper has stressed that "human agency" is instead a substantial propeller of creative activities.

Korean cultural industries have been emerging in the global popular culture market. Exports of Korean Television dramas and pop music to countries such as Japan and China have been steadily increasing since 2000, peaking in 2010 for K-dramas, and in 2011 for K-pop music. Their popularity around Asia is key to the development of South Korean creative and content industries. Beside pop-music and TV dramas, the game industry is expanding its markets internally and internationally and even the Hollywood film industry has recently shown interest in Korean films, by producing many Korean film remakes. There is a variety of creative practices for which South Korea is becoming known worldwide. For instance, South Korean classical music performers are being acclaimed for their achievements in the international music community, and in the realm of fine arts, the influence of Korean painters sculptures and photographers is becoming stronger than ever. In the span of about ten years Korean popular culture has extended its popularity to many Asian and Western countries; such an impressive growth cannot be explained with "cultural proximity" alone. Some factors behind this success are: the role of the Korean government which, since the late 1990s, has strongly supported the creative industries, and has determined a boom in the production and dissemination of South Korean popular culture products; favorable conditions in global

markets and consumption habits; and large spending in education, with a strong focus on Sports and Arts programs.

The enhancement of arts education programs is part of a national project targeting the formation of practitioners to be employed in the field of creative industries. The most deployed method is the “training-competition-reward” system, for which young artists and performers are trained, supported and motivated. At the same time, the government is intensifying its involvement in the various stages of this training process, thus recognizing the great value of cultural and creative practices.

The “human” element is seen as fundamental for the development of South Korea’s creative industries. Much of the training-competition-reward scheme falls into what Dr Kim Yeran and Prof Kim Eunmee have called “pre-planned human development” strategy. In industries such as music and TV, this has been a commonly used strategy. It translates into long and extensive training for aspiring performers, actors, and practitioners in many fields of the creative industries, and it is notably the one element that enabled several sectors of the culture industries to grow. It is widely acknowledged that whoever wants to succeed in the creative industries has to follow the rule of “10.000 hours” of training. This “pre-planned human development” refers to a neo-liberal mode of production and coordination human capacities and resources across the various fields of the Korean creative industries. Today, not only is South Korea actively exporting its popular culture products, but it is also exporting this training system as well. To provide an example of this, some Korean entertainment training programs have opened abroad. Entertainment Companies such as S.M. Entertainment have launched the “global youth star audition” and is planning to open in the USA, while JYP Entertainment is fostering programs and auditions in China.

#### **4. Dr. Lorraine Lim: *After 10 years: What’s next for the Creative Industries in Singapore?***

This presentation has given a thorough examination of the development of the creative Industries in Singapore in the last 10 years, focusing on case studies belonging to the design and media sectors of the creative industries.

The “Singapore Government Creative Industries Development Strategy” plan is the first government-led policy specifically designed to boost creative industries in Singapore. In the last ten years, the government has been active in the establishment of new bodies and institutions designed to promote the arts and creativity. This interest in the development of creative practices is first shown in a report, compiled in 1990, which advocated the creation of a policy for the arts and culture. Soon afterwards the government gave birth to the National Arts Council and Ministry of Information and the Arts. In 1995 the “Singapore Global City for the Arts” report was released, and eventually another three documents regarding the state of creative industries were published in 2000, 2002 and 2008. These three documents highlight the strong interest of the government in Singapore’s creative industries as potentially influential in the diversification and growth of national economy. Thus, the “Creative Industries Development Strategy” plan looks at how to fuse the arts, technology and business in order to become more competitive on the global economic market. The plan divides creative culture in to three categories: the first comprises arts and culture, the second design and the third media. These classifications are grouped by the term “creative clusters”. The creative clusters have been understood by the government as new ways of creating wealth and jobs.

The government has organized the development of the creative industries around a “Creation - Production – Distribution” chain. Thanks to the implementation of new policies, it is now very easy for national and international companies to invest capital in any stage of this chain. For example, in the case of the design industry, the investment of money into the production chain has been facilitated by setting up international partnerships with foreign

companies. Other measures include the creation of scholarships for design students and the enhancement of research in this sector. Due to the small size of the internal market, Singapore's Design Council is very outward looking, striving for expansion in other Asian and Western countries.

The media cluster was set up in 2003. Like the design industry it has a global outlook. The media development plan focuses on Singapore as an international media exchange place, where media contents can be sold easily. Singapore has promptly started to invest in the development of animation technologies and techniques, digital media technologies and services, and the production of documentaries. One of the results of the media development plan was the establishment of *Mediapolis* (2009), a very innovative and ambitious project to attract global capitals for new Asian media contents. *Mediapolis'* vision of Singapore vaguely defines it as the place where, as Dr Lorraine Lim said, "media contents that Asian audience value and find relevant is created".

Singapore is facing issues regarding the development of its creative industries. Many people have come to question the government's desire for the creation of something that would make money internationally and nationally. The creation and distribution of media contents is too much associated with what the government thinks would sell better or with what would improve the image of Singapore abroad. There is a strong concern for censorship, and freedom of expression among the people of Singapore. Moreover, there is a need for qualitative and not quantitative indicators of success in the creative industries. Policies and projects cannot be implemented solely with the goal of doubling the GDP or securing business deals.

##### **5. Prof Narumi Hiroshi: *Japanese Creative Designers: From "Feel and Think: A New Era of Tokyo Fashion"*.**

Globalization has had an impact on Japanese Fashion industry. Since the 1990s many international brands have opened their flagship stores in major cities in Japan. Western luxury brands have expanded their markets to East Asia, and have in some cases adapted styles and designs, making their image more appealing to contemporary Japanese consumers. For instance, in order to acknowledge their Asian clients, *Louis Vuitton* has collaborated with visual artist Murakami Takashi.

While the Japanese Fashion Industry has opened its doors to International brands, including low-cost clothing companies such as *H&M* and *Zara*, popular Japanese brands such as *Uniqlo* and *Muji* have recently been successful in Asian and western markets. Japanese globalized brands and their "real clothes", have become hugely profitable on the internal and international market. These fashion companies maintain both production costs and retail prices low by outsourcing production in other countries. As a consequence, in the last ten years many Japanese local manufacturers have gone bankrupt or have shut down.

In 2006 the Japanese Department of commerce became the biggest financial sponsor for the Japan Fashion Week in Tokyo, an event designed to help Japanese fashion designers gain recognition abroad. The result was lackluster and the department of commerce terminated its contract with Japan Fashion Week in 2010 - Mercedes Benz is now the new supporter. However, in contrast to the declining influence of the Japanese Fashion Week, many independent fashion brands found new markets in Western countries. For instance, several Lolita fashion creators managed to start business ventures in France and in the United States of America. Indeed, for many western consumers, Japanese fashion has become more about Tokyo *manga*, *anime* subcultures and street fashion, than about brands such as *Issey Miyake* and *Comme des Garçons*.

In the 1980s fashion entered the realm of cultural practices, and designers such as Issey Miyake and others were emerging in the global fashion market as icons of Japanese

creativity. In the 2000s young, independent designers have faced the difficulties in becoming successful on an international scale, while cheap, mass produced clothes have taken over the fashion market, and are sold worldwide. It is thus, very hard for independent designers nowadays to open stores or showcase their work abroad.

In 2011 the “Feel and think a new era of Tokyo fashion” exhibition was hosted at the Tokyo Opera City Art Gallery. The main target was to let the people get acquainted with independent Japanese designers. Creative designers have recently received support from the government or non-profit organizations. But many other independent designers have been forced to find resources on their own. The exhibition showed the work of top fashion designers from ten leading independent brands. Their works and style was incorporated into art installations such as pieces of sculpture. This show was also meant to represent an opportunity for fashion designers to unleash their creative potential, and try to answer the question: what is fashion?

## **DISCUSSION AND CONCLUSION**

### **Panel 1 – Government and the Creative Industries: what is the right balance?**

**Introduction/Chair: Prof Anthony Fung**

**Additional speaker: Jenny White, The British Council**

**Panel Responses: (Prof Fung / Dr Yeran Kim) and Audience**

Prof Fung introduced this panel as well as its speakers and respondents. In his introduction he raised the issue of the government control over the various fields of the creative industries in many countries in Asia. Government policies and regulations in the creative industries can be quite pervasive, as in the case of China and Singapore, where too much control has led to limitations in freedom of expression. Strict control can also become a hindrance to the development of some sectors of the creative industries. In China for example, the government has almost suffocated the film industry. On the other hand too little control can create other problematic situations. For instance, in Japan there is need for more government interventions targeting work regulations in the creative industries. With regard to this and other issues, Professor Fung asked two questions. The first is: in what ways can government authority be beneficial to the development of creative industries? The second question deals with the economic aspect of the creative industries. Very often, governments see the creative sector as a way of augmenting their national GDP. Exporting media contents, or other forms of culture, is functional to the economic growth of many countries in Asia. However, a keen attitude for money-making can affect the quality of creative products. What is then, the right balance of business-led measures in creative industries' contents?

In her talk, Jenny White examined three main areas important to understand the role of Government in the creative industries:

1. A history of the Creative industries in the UK based on her personal experience at the British Council
2. the pressure exercised by the Governments on the creative sector through financial support. The drawback is that Governments are free to define what is 'culture' or 'creativity' in relation to what is profitable for their economical or political agenda, or tend to support 'visible' industries at the expense of less visible, independent creatives
3. the different role played by an independent institution like the British Council for the development of creativity through education and regeneration programmes, in

both rich and less rich developing countries on their way to become independent producers.

There is a need to shape a new relation between the Governments and people and their communities which extends well beyond the contingent interests of the Governments, avoiding top-down approaches. To achieve a more balanced relation in their interests towards the creative industries, it is needed to organise horizontal round tables between them, local communities, educational and independent institutions such as Nesta or the British Council, and artists and creative practitioners, in order to work and collaborate together.

### **Conclusive remarks**

Comments and questions made to this panel highlighted the concern around the powerful influence of the government on cultural policies. The development of creativity and culture is often measured and judged by governments from a financial and quantifiable viewpoint. Under such a perspective money is the criteria to use when deciding what are “good” or “bad” creative industries. This financial mentality is dangerously instrumental to the development of governmental programs in support of creative industries, as it is often used for the implementation of measures aiming at developing certain domains of culture and creative industries over others. Conclusive remarks also pointed out the controversial role of governments in deciding what culture and what creative practices should be, or even what the definition of creative industries should be.

### **Panel 2 – From Importer to Exporter: how can new generations of Creative Industry professionals form distinctive national identities?**

**Introduction/Chair: Prof Mouri Yoshitaka**

**Additional speaker: Ryo Sanada, The SRK**

#### **Panel Responses, (Prof Mouri / Dr Lorraine Lim) and Audience**

Professor Mouri introduced the second panel by drawing attention to the economic value of the cultural industries. The term “creative industries” has been coined and used by governments and the definition of their contents is always linked to an economic and quantifiable value. The development of the creative industries is in most cases enhanced by governments bearing a “top-down” point of view. In a world where the ways of conceiving and producing culture is constantly changing, governments are becoming faster at chasing ways of deploying culture as an economic force. However, the creative industries themselves are responding to newly emerged capitalist modes of production, including globalisation and localisation. However, independently from economic and political influences, there are still lots of interesting things happening in the world of creativity and popular culture. For instance, subcultures or underground music movements manage to evolve and spread worldwide thanks to the impulse of globalisation and transnational exchange of creative practices. Mouri asked whether we can see an alternative potential in the creative industries and whether or not we can think of them as producing culture and creativity not from a “top-down” position but from a “bottom-up” one.

In his short talk, Ryo Sanada has brilliantly shown how a basically American subculture such as graffiti has recently taken over the streets of many cities in East and Southeast Asia. Drawings and contents have been customised to fit Asian local realities and visual styles. Some Asian graffiti artists travel around the continent and share techniques, information and graffiti trends with other artists, leading to a very interesting contamination of drawing and writing styles. For instance, it was a Japanese graffiti artist who kick-started the graffiti art scene in Jakarta. Street art in East Asian countries is often a re-elaboration of either western

and local themes, as in the case of Chinese cities, where western-style graffiti drawings are mixed with more local styles. The Internet is a great resource for these street artists, it's a way to keep in touch with other graffiti artists as well as to keep up with what is going on in the different graffiti scenes in cities around East Asia. It is possible to say that graffiti art has become a way of communicating between different cities in East Asia. One of the main points of this presentation is that often these practitioners of graffiti art do not consider their work as the expression of a national identity, but rather of a city - and thus of a very local - identity. They recognize themselves as active members of a community that only pertains to the city environment, but that has no connections with an idea of national identity. Many of these graffiti artists live and spray-paint in big cities like Osaka, Tokyo or Shanghai, cities where the sense of the "national" is lost and where a more easy-to-share "urban" culture is favorable.

### **Conclusive remarks**

For this panel comments highlighted that subcultures such as graffiti are often picked up by the creative industries, and deployed for profit, but they are almost never fully supported by official and political bodies. This is because of the very local nature of these subcultural movements, which are meant to be participative, and are not meant for profit. Graffiti and street art are bottom-up, not marketable types of culture, they are for the people in the city to watch and to share. Moreover street art seems to be more linked to the city environment, and is not representative of any kind of national identity, or national form of culture. The execution of such creative practices often escapes from government control, and since they are not easily exportable and cannot be used by governments as tools for money making, they clash with the very idea of creativity as defined by cultural and creative industries policies. In the case of Singapore, for instance, the government contrasts this kind of creative practice because it is not functional to the economic growth of the country.

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