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Telecommunication Industry in China: Looking Back at the Thirty-Year Development

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Telecommunications were a pivotal sector of Chinese political and military affairs before the opening-up policy while, with the transition to the “socialist market economy”, it has become a pillar industry in the country. The many changes introduced in telecommunications in these years reflect the transformations taking place in the Chinese society.

Undoubtedly, telecommunications as an industry in China is much stronger than it is supposed to be. Not only has it strongly supported the development of other industries in the socialist market economy, it has also become a giant itself, serving both industries and consumers. Some people believe that the achievements of the telecommunications industry should be assessed only on the amount of the profits but this is not sufficient as we have to consider also the benefits for the public interest, which is different from the consumers’ interest.

To understand the present day Chinese telecommunication sector it is important to look at its development since the opening-up. Three phases can be identified.

First phase (1949-1978). In this period the Ministry of Post and Telecommunications was in charge of telecommunications-related affairs. The Ministry was at the same time a regulator, an owner and an operator. At that time the main objective of telecommunications was to serve political/military purposes, which prevailed over public uses. This required a highly centralized structure to guarantee that the set objective was achieved and meant that residential phones were only made available to certain groups such as senior government officials as a symbol of their political

status. In addition, during the long war before 1949 which saw Mao’s Communists fighting first against the Japanese and then against the Nationalists, and the cold war of the 1950s-1960s, telecommunications played a key and sensitive role in military affairs and in the security of the entire country. In a word, during this phase, telecommunications were very important but had little to do with the ordinary people.

Second phase (1979-1993).

The transition from the planned economy to the socialist market economy led to a change in the role of telecommunications. Before, the political objective of the government in using telecommunications as both a government and military tool clearly inhibited commercial incentives in the industry (Xu and Pitt, 2002). But, after 1978, telecommunications were considered for industrial and commercial use too. The government began to realize that “a poorly developed telecommunications infrastructure acted as a major demotivator in attracting investment in local economies” (Xu and Pitt, 2002).

However, partly because the administration had been driven by politics for such a long time, telecommunications were too weak to support the development of the economy. In these circumstances, the Ministry of Post and Telecommunications requested some privileges including preferential policies, more funds from the government and more support from other related ministries. However, because these measures did not produce the desired results, with the permission of the government the Ministry of Post and Telecommunications charged the people who received the service high fees (including the installation fees and some additional fees), al-

lowing telecommunications to lay the foundations for future development.

Third phase (1994-today).

Despite the strong support of the government, China's telecommunications did not become an industry until 1994 when China Unicom, the first communications operator, was set up with the approval of central government to foster competition. China Telecom, which was created by the Ministry of Post and Telecommunications, was set up the following year. In 1998 the Ministry of Information Industry took the place of the Ministry of Post and Telecommunications, creating a symbol to support the new market-oriented approach. In 1999 China Mobile was split off from China Telecom as an independent economic entity: the backbone of the telecommunications structure was forming. After that a number of smaller telecommunications companies were set up one after another. However, because they had a small market share, they were forced to merge into the three giants in 2008. In the same year, the Ministry of Industry and Information Technology took the place of the Ministry of Information Industry to supervise, regulate and manage a telecommunications environment which had become larger and more complex with the advent of new technologies.

Today, despite the existence of the three telecommunication operators, there is effectively no competition among the three giants and the market is divided into three overlapping segments, in which the service is almost completely monopolized by one or two operators. Moreover, the three giants are state-owned companies so they have been promoted and aided by the power of both the government and the market.

To better understand the development of China's telecommunications and its dimensions since

the opening-up, it may be useful to look at some simple statistics. According to the latest data of China's National Bureau of Statistics (NBS), investments in telecommunications are increasing by 26.5% per annum, from RMB260 million (€27.778 million)¹ in 1978 to RMB237.010 billion (€22.750 billion) in 2007: the many changes and new demands in the last two decades have forced the Ministry of Telecommunications to allocate more resources to the sector in order to face the new challenges.

The data on the turnover of telecommunication services also show an impressive growth of 28.8% on average per annum since 1978, reaching RMB 1,859 billion (€178.444 billion) in 2007. Over the last 30 years the use of fixed-line telephones has spread rapidly among the population, especially in rural areas. By the end of 2007 the fixed-line telephone service recorded a penetration rate of 36.56 lines for every 100 inhabitants, 188.9 times more than in 1978. Urban areas show a higher number of users: 248.6 million users compared to 117 million in rural areas.

The growth of the mobile phone in China is even more impressive. Since the adoption of an analog Total Access Cellular System (TACS) network in 1987, which marked the China's entry into the mobile phone system, mobile communications have developed rapidly and profoundly transformed China's communications structure and people's lives: the number of mobile phone users increased from 3,000 in 1988 to 547.31 million at the end of 2007, a growth rate of 89.2% per annum. China's mobile phone penetration rate (the number of mobile phones for every 100 inhabitants) has reached 41.6%, exceeding the penetration rate in the fixed-line sector by 13.8% (NBS, 2008).

¹ For the sake of convenience, the exchange rate between the euro and the RMB for 1978 is the average exchange rate of the two currencies from 2001 to 2007, which is €1=RMB9.36..

NBS's data show that by the end of 2007 the total number of telephone users (fixed-line and mobile) was 192 times greater than in 1988, reaching 912.9 million, while the penetration rate, at national level, increased from 0.4% in 1978 to 69.5% in 2007.

The information and technology sector has developed rapidly as well. Indeed, since 1994, when China officially joined the Internet, WWW users increased from 620,000 in 1997 to 210 million in 2007,² ranking second in the world behind the USA. The netizens with a broadband connection amounted to 160 million, while those with mobile connection reached 50.4 million at the end of 2007. The Internet penetration rate increased from 0.1% in 1997 to 16% in 2007.

In the last 15 years, as in most developed countries, media convergence has become a common concept in China as well. On 26 April 2010, the MIIT held a workshop in Beijing to discuss and put forward proposals for China's information and technology industry under the framework of the working draft for the 12th Economic Five-Year Plan to be presented around October this year. One of the issues of major concern is the implementation of the three-network convergence (telecom, broadcast TV and internet). The MIIT and the State Administration of Radio, Film and Television (SARFT) have already delivered a draft proposal to the State Council to further promote the advancement.³ The three-network convergence would introduce innovative new services, drive consumption, create new jobs and, ultimately, drive the economic growth.

2 More recent data show that Chinese Internet users reached 404 million in the first quarter of 2010 and that the Internet penetration rate reached 28.9% in the same year. See News section.

3 See News section.

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Animation 'Made in China': Has the Invasion of Chinese Animation Products Begun?

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China has undoubtedly become the biggest producer of goods and basic commodities over the last two decades: from the smallest to the largest, companies throughout the world have started to outsource their production to China because of the much lower labour costs. What would happen if international producers decided to produce their cultural audiovisual content in China?

Recently, Hollywood has tried to approach the Chinese world by making some large co-productions which have reaped great success with the international audience; just think, for example, of the films directed by Jackie Chan and Yang Yi Mao. However, so far Hollywood has not been successful in making blockbusters produced in China.

One of the main reasons for this is that westerners cannot identify with the typical Chinese canons and products: in fact, these cultural canons are considered to be very different from western ones, especially those used in live action and TV series. This is interesting if we consider that, on the contrary, the basic Chinese commodities such as clothes, food and toys are usually appreciated in the West and worldwide.

Parallel to the process that has affected the production of goods, a new trend seems to be emerging in the production of some audiovisual content: some Chinese cultural canons seem to be disappearing from cinema and animation products. Let us consider the example of Japanese animation. The first case of Japanese outsourcing to China in the sector of animation dates back to the 1940s when the Japanese author Tadahito Mochinaga moved to Shanghai. *Thank You, Kitty* (1952), one of many works of this author, was created

for the Shanghai Animation Studio. This animation movie, a resounding success, was above all a low-cost production.

More recently, Italy has produced some animation films and TV series in Chinese animation studios. One is *Amita of the Jungle*,⁴ an Italian animation series (26, 7 minute episodes) financed by RAI Fiction and Lastrego & Testa and produced in the Nanjing-based animation studio Blue Dolphin. This series is now being broadcast by the Italian public broadcaster RAI⁵ and other European countries such as France, Switzerland, Spain and Belgium have bought the broadcasting rights.⁶

Aware that that this sector can be very profitable for the national economy, the Chinese government has recently started to send a new generation of directors, producers and designers to be trained at the Japanese and American animation studios. Furthermore, since 2006 the Chinese government has promoted the development of cinema and TV series with the aim of reaching 1% of GDP in the next five years against an investment of around RMB250-350 million (€29-41 million).

Thanks to these government policies there have been substantial changes in animation production in China: in fact, while only 5 animation TV series for a total of 991 minutes were produced in 1997, in

⁴ <http://ricerca.repubblica.it/repubblica/archivio/repubblica/2008/01/05/giovanna-tommasone-alla-conquista-della-cina.html>.

Accessed on 4 May 2009 on the online edition of the Italian daily *La Repubblica*.

⁵ Since 25 January 2009 it has been broadcast every Sunday morning on Rai3, the third channel of the Italian public broadcaster RAI.

⁶ Some countries are still negotiating the purchase of the broadcasting rights with the Italian producers. Detailed information is available on <http://www.lastregoetesta.it/inglese.html>.

2007 the number of animation TV series increased to 186 for a total of 101,614 minutes (Blue Book of China's Radio, Film and Television, 2008).

In 2004 the annual production of cartoons could not meet the internal market demand because there were only 29,000 minutes while the market demand was 268,000 minutes. Today, there are 34 TV channels devoted to young people and 4 devoted specifically to cartoons in China. According to the China Animation Industry Report (2005-2006), the production of animation series accounts for 800 minutes of cartoons per day: a remarkable achievement that shows us how China has successfully invested in the animation sector.

So far Japan, the leading animation producer in the world, has not taken the growth of the Chinese animation production seriously because Chinese animation products are generally considered bad, low-quality copies. For example, the Chinese animation series *Astro Plan*, broadcast on Hunan TV since January, shows typical design features of *Macross*, a very well known Japanese animation series from the 1980s. In *Astro Plan* there is even the character Lockon Stratos from the well-known Japanese anime *Gundam*. Other copycat examples are *Kou dai xi yuu*, which is copied from the game and anime *Blue Dragon*, and the latest animation version of *Xin Ling Zhi Chuang*, which appears to be a copy of the Japanese original *Byousoku 5 cm*: many photographs are the same as the original ones.

The worsening situation of the pay and working conditions has recently pushed Japan to look at China and begin to realize that it is a real rival in the animation industry. An article published on the online edition of the Japanese daily Mainichi Japan, dated 29 March 2010,⁷ invites the Japanese ani-

mation studios to seriously consider the future invasion of Chinese animation products. Moreover, the article focuses on the fact that the Japanese anime industry is suffering a slump due to the low pay and poor working conditions of the Japanese authors who, of course, do not want to work anymore in this circumstances. Consequently, the Japanese animation companies are forced to outsource much of their work abroad, especially to China. Working for Japanese anime companies is good training for the Chinese authors who are becoming more skilled. It follows that the slump of the Japanese anime industry goes hand in hand with the growing efforts of the Chinese authors to surpass Japan in its anime production.

Another issue of concern is that the Chinese government is trying to push its authors to create high quality content and stories and, at the same time, it is promoting Chinese production all over the world. In fact, during the 2010 edition of the Tokyo International Anime Fair, which took place from 25 to 28 March, China organized a so-called "China-Japan anime summit". Jimmy Tse, chief executive of Top Art Investment Ltd., which is specialized in merchandising Chinese animation characters, said that now the Chinese people are starting to think, 'How come I'm manufacturing for someone else?' Why are we not creating anything ourselves?" (Mainichi Japan, 29 March 2010).

During the fair high ranking representatives of China and Japan signed important joint venture agreements: the Secretary for the Ministry of Culture Industry Mr. Wu Jiangbo and Fukawa Yu from the Japanese Animation Association signed a cooperation agreement that involves 14 companies in China and Japan in 8 projects for a contract value of up to RMB130

anime push as Japan hits slump" and is available on <http://mdn.mainichi.jp/features/news/20100329p2g00m0et015000c.html>

7 The article is titled "China making

million (€15 million).⁸

However, the Chinese invasion has already started with animation feature films such as *Highlander: The Search for Vengeance* (2007), *Astro Boy* (2009) and, more recently, with some high quality animation series such as the *Romance of Three Kingdoms* about a Chinese historical event produced by China Central Television (CCTV) and the Japanese Takara Tomy. This series has been a real success in China and will be aired very soon in Japan as well.

Is this the start of the invasion? Well have to wait and see.

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⁸ <http://tech.disontech.com.cn/market/view/id/6838>

CHINESE MEDIA AT A GLANCE: NEWS FROM CHINA

China Media Observatory, Lugano.

Xinhua News TV Network Begins global English TV trials

China's official Xinhua news agency launched a 24-hour, global English TV service that is being broadcast on trial via AsiaSat-6, cable systems, the Internet and mobile phones from May 1. The English TV service will be produced by China Network Corporation (CNC), which is affiliated to Xinhua. After a two month trial period, the English service will be officially launched on 1 July.

Backed by the local and overseas Xinhua correspondents network, CNC aims to quickly respond to major news events in China and abroad, and provide objective, comprehensive, in-depth and multi-dimensional news analysis, Xinhua President Li Congjun said.

He said: "CNC will offer an alternative source of information for a global audience and aims to promote peace and development by interpreting the world in a global perspective."

CNC's programmes include World News, China Report, Business News, Lifestyles, and news magazine programmes such as China View and Click On Today, as well as feature programmes such as World Perspective and Global Visitors.

Sources: News Reference (Cankao xiaoxi) – April 30, 2010; Xinhua – May 7, 2010

GAPP Developing Regulations for Digital Publications

The General Administration of Press and Publications (GAPP) is developing operational regulations for the e-book publishing industry, said Zhang Yijun, director of the Technology and Digital Publishing

Division, at a China Written Works Copyright Society forum held on May 10. The regulations are to provide copyright protection for pre-loaded digital content on electronic readers as well as any content downloaded from the Internet. There are numerous standards that are to be developed which will involve the format of content, encryption, copyright, management as well as authentication, Zhang added. In 2009, the e-book publishing industry was worth RMB 795 million (€83.44 million) and there were more than 100 million e-book readers in China.

Sources: GAPP, www.sina.com – May 13, 2010.

China pushing for ten news websites to go public

Ten government-backed news websites in China could go public early. Authorities have selected 10 candidates for domestic stock market listings, including the Xinhua news agency and China Central Television (CCTV). The website of the People's Daily, the Communist Party's mouthpiece, and the Shanghai government's Eastday.com would also be among the first state-run news hubs to go public. Beijing wants domestic news websites to tap the capital market for more funds to expand and introduce modern shareholding structures, although the state would retain a controlling stake.

The Central Propaganda Department and the China Securities Regulatory Commission are actively pushing for at least one or two firms to go public this year. Eastday.com may become China's first online news hub to list domestically.

Source: Shanghai Securities News (Shanghai zhengquanbao) – May 10, 2010.

Shanda Games to acquire US online game network

Shanghai-based online game developer Shanda Games will buy out US online game network Mochi Media for US\$80 million (€64.44 million). Shanda will pay US\$60 million (€48.33 million) in cash to Mochi Media and give US\$20 million (€16.11 million) worth of shares in Nasdaq-listed Shanda. Shanda chief executive Diana Li said the acquisition will extend Shanda's reach through Mochi's global online game distribution network, and allow the company to move down-market from its current focus on advanced games for serious players to more casual players. She cited projections that show that the community-based lightweight game market will reach US\$15 billion (€12.1 billion). She also said the move is part of Shanda's strategy to expand into the US market, and has already prepared 10 titles designed for English speakers. Shanda currently holds 20.8% of the Chinese online game market, close behind market leader Tencent, which holds 23.1%.

Source: *China Economic Review* - January 14, 2010.

Mainland advertising grew 13.5% in 2009

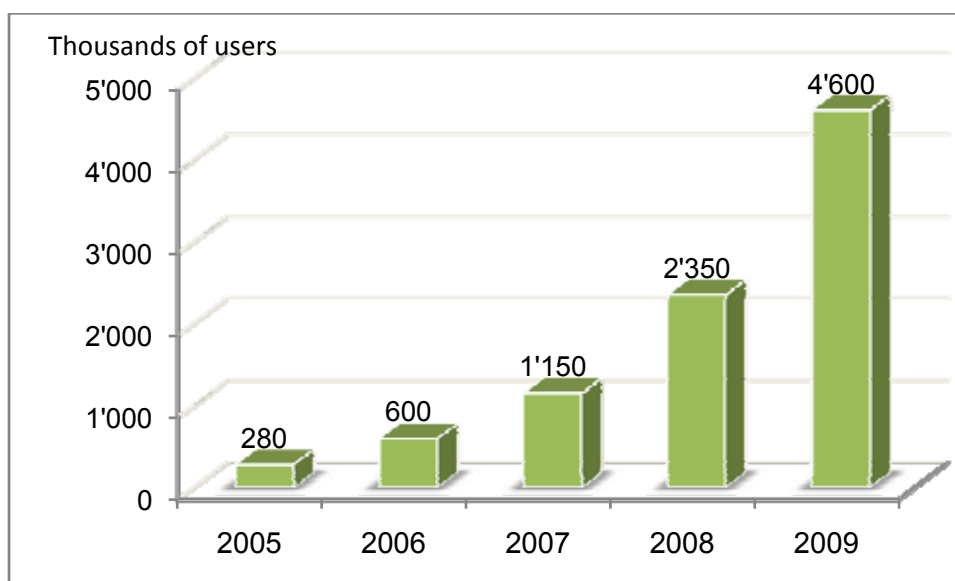
Advertising in the mainland grew 13.5% in 2009, reaching US\$74 billion (€59.6 billion). The industries with the highest ad spending were cosmetics and toiletries, with L'Oreal topping the list with an ad spend of US\$42 million (€33.8 million). The greatest growth in ad spending was registered in the beverage industry, which experienced a 52% annual growth. The milk-tainting scandal forced companies like Mangniu and Yili to increase ad spending by 77% and 99% respectively. Television dominated the market, representing a 78% share as an advertising medium even as the State Administration of Film, Radio, and Television (SARFT) limited commercials to only 12 minutes per hour.

Sources: *South China Morning Post* - January 26, 2010.

The number of IPTV users in China hits new records

By the end of 2009 the number of IPTV users in Shanghai city stood at 1.01 million, making Shanghai the first city in the world in terms of IPTV users. The provinces of Jiangsu and Guangdong follow with around 300,000 IPTV users each. By the end of 2009 IPTV users in China stood at 4.6 million nation-

Fig. 1 - IPTV users in mainland China, 2005-2009 (thousands of users)



Sources: SARFT; *People's Daily Online* - March 31, 2010

wide, with a growth rate of around 100% over three years (see Fig. 1).

According to a joint interview released to Xinhua by the telecommunication administration office at the Ministry of Information Industry and Technology (MIIT) and the media administration office at the State Administration of Radio, Film and Television (SARFT) on February 9, the telecommunication operators can be active in IPTV and TV via cellular relay and distribution.

Sources: SARFT, People's Daily Online - March 31, 2010.

Dragon Satellite TV to Launch Adapted ITV Format

Shanghai-based superchannel Dragon Satellite TV will launch a new talent show called *Expo Talent (Shibo Daren Xiu)* based on the *Britain's Got Talent* format purchased from ITV. The State Administration of Radio, Film and TV (SARFT) has approved the show to kick off on May 1. Dragon Satellite TV is dropping both its previous talent shows - *Hero (Jiayou Hao Nan'er)* and *My Show (Woxing Woxiu)* that selected singers, actors and actresses. The new show will select talents that represent cultures from all over the world and is planned to end at the end of August.

Source: Phoenix TV (www.iFeng.com) - April 10, 2010.

China at Cartoons on the Bay (Italy)

The 2010 theme of Cartoons on the Bay, which took place from 15 to 18 April in Liguria (Italy), was Diversity to which the second day of the program of the Festival was dedicated: from cultural and religious, to political and social diversities. China was Guest Country of the 2010 edition of the Festival and Chinese Animation was the object of many events. A delegation of producers came to Cartoons on the Bay to promote meetings

and forge relationships between the innovative Chinese audiovisual industry and the Italian one. For instance, the Italian cross-media company Atlantyca Entertainment has secured a distribution deal with China's CCTV Animation. The agreement grants Atlantyca exclusive broadcasting and home video distribution rights throughout Europe for the English-language version of *The Monkey King* (52 x 22-minutes). Based on the Chinese novel *Journey to the West*, *Monkey King* is a 3D-animated series developed and produced by CCTV Animation. Atlantyca, which opened a field office in Beijing in January 2010, is among the first European distributors to represent programming from China.

Source: *Cartoons on the Bay Festival* - April, 2010.

Proposal on "Three-Network Convergence" Delivered to State Council

The Ministry of Industry and Information Technology (MIIT) and the State Administration of Radio Film and Television (SARFT) jointly delivered the first draft of a proposal to the State Council in early April for preliminary "three-network convergence" in China - basically, the technical integration of telecommunications, computer and cable television networks. The convergence process could eventually mean that radio and television broadcasters could participate in some permitted areas of the telecommunications sector, and that state-owned telecommunications operators could offer certain radio and television services according to government stipulations.

Source: *Chongqing Evening News (Chongqing wanbao)* - May 3, 2010.

Google's share of China search revenue in decline

Google's share of the Chinese internet search revenue dropped

to 30.9% in the first three months of the year from 35.6% in the last quarter of 2009, an indication of the commercial impact of the US firm's fall-out with Beijing. Google's share had increased in all but two quarters since 2006. Local rival Baidu saw its share rise to 64% in the first quarter compared to 58.4% in the previous quarter. Following Google's decision to shift its Chinese site to Hong Kong and cease obeying government censorship requirements, analysts tipped a proliferation of smaller local search players to benefit in addition to Baidu. However, Sohu.com's Sogou search engine saw its revenue share drop to 0.7% from 1% in the first quarter, while Tencent's Soso dropped to 0.4% from 0.7%.

Source: Analysys International (Yiguan guoji) – April 27, 2010.

Chinese Internet Users Reach 404 Million in Q1 2010

Wang Chen, director of the State Council Information Office, said that China's Internet users reached 404 million in the first quarter of 2010, with an Internet penetration rate of 28.9%, above the world average. 233 million Chinese now use their mobile phones to access the Internet, Wang said. China now has 3.23 million registered websites, and 346 million web users with access to broadband.

According to the latest data, 99.1% of the townships and 92% of the administrative villages have Internet connections, whereas 95.6% of the townships have broadband. The 3G network has basically covered all the national territory as well.

The data show that in the past 16 years the telecommunication sector in China has grown by 26.6% per year, contributing to China's GDP from an early poor 1% to the more recent 10%. In 2009

China's e-commerce sector was valued at RMB400 million (€47.19 million). Many analysts agree that the Internet has become an innovative driving force of China's economic growth.

Source: Nanfang Daily (Nanfang dushibao) - May 1, 2010.

Online TV drama and product placement in China

The famous French short-form TV program Camera Café has landed in China. Indeed, the media agency Mindshare launched the all-digital Chinese version of Camera Café with Nescafé as sponsor on youku.com (<http://cameracafe.youku.com>), beginning January 25th, 2010 for an ambitious four month season (60 original episodes for season one). The aim is to increase the popularity of the coffee culture especially among Chinese youth.

Another example of sponsored online drama is Sufie's Diary (<http://www.sufei.tv/>), a Huaso (joint venture between Sony Pictures Television International and China Film Group) production. The Portuguese show has also been adapted in many countries (e.g. US, UK, and Vietnam). Clinique, Sony Electronics and online job search site 51job.com were involved as advertisers since the first season. Each 3-minute episode is aired through major Chinese video and social media portals (Sina, Cernet and Youku), and also in airports, public buses and subway stations in Beijing and Shanghai.

The degree of interactivity with the audience is very high and indeed the plot line is solely driven by netizens through weekly online polls or mobile voting: visitors can interact with the main characters through online comments and blogs on dedicated websites as well.

Sources: <http://cameracafe.youku.com>, <http://www.sufei.tv> - April, 2010.

EVENTS, CONFERENCES and BOOKS ABOUT CHINA

China Media Observatory, Lugano.

■ **Where Africa, China and the West meet: towards new frameworks for media development**

University of Oxford, UK.

June 10-11.

The workshop aims to reflect on China's increasing influence on the media in Africa and on the implications this has for traditional approaches to media assistance and media development on the continent and beyond. Media assistance, either through direct financial assistance, the training of journalists or regulators, legal aid or technical support, has been a common way governments try to extend influence within a country and support a particular political process. Since the end of the cold war it has been dominated by Western powers which have framed the media as watchdogs and as a democratizing force and often supported the so-called 'independent' media. In the past few years, however, this approach has started to be challenged by the greater emphasis placed by China on reinforcing the state-owned media so as to increase the capacity of governments to communicate with their citizens, supporting academic institutions that encourage 'developmental journalism', and the transfer of communications technology that allows for greater control of information. The scholars gathering in Oxford will be asked to develop new methods and strategies to study and understand these new scenarios as well as to propose ways in which different approaches can coexist rather than compete in the continent.

The event is organized by the Programme in Comparative Media Law and Policy at Oxford University and by the Stanhope Centre for Communication Policy Research with the support of the Economic and Social Research Council. For further information please contact Iginio Gagliardone: i.gagliardone@lse.ac.uk

New & Notable Books

Rohn, Ulrike (2010). ***Cultural Barriers to the Success of Foreign Media content: Western Media in China, India, and Japan***, Frankfurt: Peter Lang.

The author takes a new approach to understanding cultural barriers to the success of foreign media content by analyzing the entry strategies of media giants (from Time Warner, to Disney and News Corporation) in India, Japan and China. A new theoretical classification of reasons for the cross-cultural success and failure of media content is provided: the Lacuna and Universal Model is based on the analysis of legal, political, and economic barriers to successful entry, and this theoretical contribution fits perfectly with the case of China. The book identifies the patterns of strategic choices between global standardization and local adaptation in relation to changing forces and regulation in the Chinese media market.

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