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Screen monopoly and diversity: a comparative study between the Korean and French film industries

Jimmyn Parc [a,b] and Patrick Messerlin [c]

[a]Department of East Asian Studies, University of Malaya, Kuala Lumpur, Malaysia; [b]Seoul National University, Seoul, South Korea; [c]Sciences Po Paris, Paris, France

ABSTRACT
In recent years, there have been many voices in Korea arguing that a few commercially successful films take up the opportunities for the exhibition of other films and thus limit the selection of titles available for moviegoers, a trend dubbed the "screen monopoly". In seeking a solution, a number of scholars have looked to the anti-screen monopoly "regulations" in France, but without providing rigorous or persuasive evidence. By comparing the appropriate variables of Korea and France, this paper argues that the Korean film market is less monopolised than France despite the non-existence of these regulations. Furthermore, it demonstrates that Korea has more diversity than France. As a result, this paper concludes that introducing the French anti-screen monopoly regulations in Korea does not seem a beneficial option. The findings in this paper suggest a strong need to re-examine the effectiveness of government policies in the cultural industry.

KEYWORDS
Screen monopoly; diversity; film industry; Korean film industry; French film industry; film policy

Introduction

The Korean film industry has demonstrated significant growth since the late 1990s and, as of 2019, it is the fourth largest box office market in the world following the United States (US), China and Japan (MPA, 2020). It has also been able to produce films that are as attractive as those from Hollywood, at least, within its domestic market. Given that several Korean films have been recognised at prestigious international film festivals, there are further signs that it is achieving success abroad. Finally, the Korean film industry is a constituent part of *Hallyu* or the Korean Wave, which has helped to increase its international audience.

Despite these milestones, a wide range of voices has sharply criticised the industry – arguing that key factors hinder its further development. Among them, the so-called screen monopoly has been one of the most contentious issues that have drawn in attention from a range of concerned parties including industry, government and the public. This term is used to mean the situation where one or only a few film titles dominate the majority of screens in movie theatres. In this context, Kim (2019), Nam (2017) and

CONTACT Jimmyn Parc jimmyn.parc@um.edu.my Department of East Asian Studies, University of Malaya, Kuala Lumpur 50480, Malaysia

Song (2016) all argue that a screen monopoly favours films produced by large companies. Kim et al. (2018) assert that it limits the number of films that moviegoers can choose to see due to the unavailability (or slim availability) of films produced by small and medium-sized enterprises (SMEs). Therefore, it has been widely believed that such an outcome is a big obstacle toward protecting (or maintaining) cultural diversity.

One of the first cases to highlight this screen monopoly in Korea was the film *The Host* (2006) directed by Bong Joon-ho, which was shown on 38% of all screens (620 out of 1,648 available) following its release. This issue has resurfaced every year since: in 2019, the Korean comedy *Extreme Job* created another hot stir over its dominance of the screens as it took up 64.2% of all screens (1,978 out of 3,079) during its first week of release (KOFIC, 2020b, p. 13).

These grievances have not been limited to domestic films. In February 2020, the Korean NGO Public Welfare Committee (PWC) filed a complaint requesting an investigation into Walt Disney over its suspected screen monopoly of the Korean film market. This was due to the success of *Frozen 2* that was released on 88% (2648 out of 3079) of screens in Korea on its opening day (KOFIC, 2020b, p. 23). PWC argued that this feature was an infringement of a provision from the Korean anti-trust law that defines any individual or company with over 50% of market share as a "market-dominant enterprise".

In response to these criticisms, the Korean government has begun to consider tightening screen quotas as a way to address the issue (Park, 2019; Yoon, 2019). Many scholars and practitioners argue that Korea should adopt the French "anti-screen monopoly" regulations; the arguments in favour made by these proponents are covered in the literature review. This proposal is based on the prevailing assumption that France does better than Korea in terms of restricting a screen monopoly and promoting more diversity thanks to its regulations. However, interestingly, there has been so far no convincing evidence that the French anti-screen monopoly regulations are effective enough. Therefore, the crucial task for this paper is to compare the level of screen monopoly and diversity in the exhibition sectors of the two countries before discussing about how to implement these new policies. Here, it is important to mention that the Korean and French film industries are broadly comparable in key aspects such as the box office market size or the number of admissions (Messerlin and Parc, 2017; Parc and Messerlin, 2021a, pp. 3–4).

This paper covers these thorny issues with statistical evidence based on data from 2010 to 2019. This is because most of the relevant studies have appeared in the 2010s. At the same time, the COVID-19 pandemic since 2020 has also distorted the film market tremendously. To provide a coherent flow, this paper consists of the following contents. The first section presents the critical literature review including the main arguments in support of measures against the screen monopoly. The second section explains the methodology used in this paper. The third section compares the distribution and exhibition sectors of Korea and France in order for readers to understand more clearly the background. The fourth and fifth sections seek to analyze in depth the alleged screen monopoly and diversity issues, respectively. Later, the sixth section discusses a new perspective to interpret the apparent "congestion" of a few films on a number of screens by introducing the concept of "turnover", which is a crucial feature of the exhibition process but little mentioned in the debate on the screen monopoly. Based on the analyses in this paper, it concludes that introducing the French anti-screen monopoly regulations in Korea would not constitute as a beneficial option.

Critical literature review

Kim (2019) argues that the screen monopoly is generated by corporate behaviour in order to maximise profits. This is based upon the assumption that large and powerful companies have better resources to secure effective distribution channels, whereas films produced by SMEs will not have a fair chance to be exhibited at movie theatres. For instance, Kim states that 19.23% of films have been exhibited less than 7 days per year and most of these films are produced and/or distributed by SMEs. Furthermore, she links the screen monopoly issue to the oligopoly in the distribution and exhibition sectors, arguing that three companies – CGV, Lotte and Megabox – share almost 98% of the whole screening industry.

The level of this Korean "anomality" can be measured by the Herfindahl–Hirschman Index (HHI), a commonly accepted indicator to measure market concentration. The HHI takes into account the relative number and size of firms in a market. It is calculated by squaring the market share for each firm competing in the market and then summing up the resulting numbers. For example, for a market consisting of four firms with shares of 30%, 30%, 20% and 20%, the HHI is 2,600 ($30^2 + 30^2 + 20^2 + 20^2 = 2{,}600$). It approaches zero when a large number of firms of relatively equal size operates in the market at stake and reaches its maximum of 10,000 points when the market is controlled by a single firm. In other words, the HHI increases both as the number of firms in the market decreases and as the disparity in size between those firms increases. Competition or regulatory authorities generally consider markets in which the HHI is between 1,500 and 2,500 points to be moderately concentrated and markets in which the HHI is in excess of 2,500 points is considered to be highly concentrated (The US Department of Justice, 2018).

The Korean Film Council (KOFIC) (2017, 2020a) calculates the HHI for the Korean exhibition and distribution sectors based on revenues from 2013 to 2019. By using this result, KOFIC (2020a, p. 15) argues that Korea has a serious problem in its exhibition and distribution sectors (see [1] and [3] of Table 1). Based on this view, Kim et al. (2018) deem that France, Germany, Japan and the US have less concentrated markets than Korea and present concentration ratio based on the HHI of these five countries' exhibition and distribution sectors (see Table 1).

As France has the lowest concentration in the distribution and exhibition sectors, Kim et al. (2018) argue that it can be a good benchmark for better policies to solve the concentration in these sectors in Korea. In fact, other scholars such as Bae (2015) and Roh (2016, 2019) also consider France's anti-screen monopoly regulations in the exhibition and distribution sectors as a good example to follow. However, all these arguments should be thoroughly examined before adopting such a policy due to the following reasons.

First, Kim (2019) argues that 19.23% of films are produced and/or distributed by SMEs and they have been exhibited less than 7 days per year. In this regard, it is important to mention that since 2016, KOFIC (2020a, p. 23) has published two sets of data for film releases: "actual release" and "nominal release". The actual release is for films that are exhibited more than forty times a year – a number that can be reached when a film is exhibited 7 days consecutively at movie theatres. By contrast, the nominal release is for films that are exhibited less than forty times or less than 7 days a year, the type of films produced by SMEs as referred to by Kim (2019).

Table 1. Market concentration of selected countries based on HHI (2013–2019).

	2013	2014	2015	2016	2017	2018	2019
Exhibition (CR3[1])							
Korea (1)	96.1% (3591)	96.7% (3695)	97.1% (3732)	97.1% (3680)	97.0% (3610)	96.9% (3610)	97.2% (3641)
France (2)	47.1% (883)	46.8% (846)	45.7% (825)	43.2% (742)	43.2% (731)	44.6% (755)	47.8% (879)
Distribution (CR3[1])							
Korea (3)	53.9%	48.2%	51.4%	43.4%[2]	36.9%	44.3%	58.4%
US (4)	49.5%	51.6%	59.0%	57.1%	n/a	n/a	n/a
Japan (5)	54.2%	70.3%	63.0%	59.9%	n/a	n/a	n/a
France (6)	32.8%	32.2%	38.3%	37.5%	33.1	32.7	43.2
UK (7)	47.5%	47.7%	56.6%	53.8%	n/a	n/a	n/a
Germany (8)	41.1%	45.5%	51.2%	57.8%	n/a	n/a	n/a

Notes: [1]CR3 means concentration ratio of the top three companies in sectors; [2]KOFIC (2017, p. 38) stated that the HHI for the distribution sector in 2016 is 43.4% while KOFIC (2020a, p. 45) mentions that it is 43.1%. The authors contacted KOFIC who confirmed that it should be 43.1%, not 43.4%.

Data sources: KOFIC (2017) for data of 2013–2016 in (1) and (3); KOFIC (2020a) for data of 2017–2019 in (1) and (3); Centre national du cinéma et de l'image animée (CNC) (2017, p. 51) and CNC (2019, p. 51) in (2); CNC (2017, p. 84) and CNC (2019, p. 84) in (6); Kim et al. (2018) for the rest.

In fact, the share of Korean films with the nominal release is very high; it reaches 54.6% on average during the period of 2016–2019. Regarding foreign films for this type of release, it reaches 62.2% on average during the same period. Overall, the percentages are between 55.7% and 62.8% (see Table 2). It is important to stress here that films through nominal release actually seek to be diffused (and earn revenues) more through video-on-demand (VoD) service providers than through movie theatres. This practice is related to two provisions in Korean law (Promotion of the Motion Pictures and Video Products Act, 2018, Chapter 1, Article 2, Paragraph 1): (1) if audio-visual content is exhibited at a movie theatre or similar facilities, it is classified as a "motion picture"; (2) once it is recognised as a "motion picture" released at movie theatres, it can then receive a premium from VoD service providers when it is made available. In this context, the figure of 19.23% is incorrect while Kim's (2019) argument does not really support the alleged screen monopoly issue.

The argument based on HHI has its own problems as well. Kim et al. (2018) show the average concentration ratio of the top three distributors from Japan, US, United Kingdom (UK) and France during the period of 2013–2016 is 61.9%, 54.3%, 51.4% and 35.9%, respectively. According to KOFIC (2017, p. 38), the same figure for Korea is 49.2%. In other words, when compared with other countries, Korea is not the worst case regarding how its distribution is concentrated. Furthermore, France is the only country that has a lower HHI in the distribution sector than Korea, which would suggest that the monopoly issue is only closely related to the exhibition segment.

It is important to stress that this conclusion needs further in-depth examination because the unit of analysis for the screen monopoly issue should be at the film-level, not the company-level as the screen monopoly is about a few films dominating a large number of screens at the expense of other films. To put it in a different way, if Company A produces (and/or releases) Films X, Y and Z during the same period and Film X turns out to be a big hit, then Films Y and Z which are produced (and/or released) by the same company will also be the "victims" of the screen monopoly. Indeed, this remark can now be extended to the company-level. When the market is concentrated in the hands of a few large companies, the main "victims" of the screen monopoly by a few films will additionally be the other larger companies, not merely SMEs.

To sum up, much of the criticism aimed at the screen monopoly in Korea is not based upon conclusive evidence. Hence, the belief that the screen monopoly limits the right of moviegoers to choose films and weakens cultural diversity does not have a solid basis.

Table 2. Share of films with actual and nominal releases in Korea (2016–2019).

	2016	2017	2018	2019
Total	1520	1620	1647	1739
Actual release	578 (38.0%)	619 (38.2%)	730 (44.3%)	647 (37.2%)
Nominal release	942 (62.0%)	1001 (61.8%)	917 (55.7%)	1092 (62.8%)
Korean films	302	376	455	501
Actual release	167 (55.3%)	164 (43.6%)	196 (43.1%)	199 (39.7%)
Nominal release	135 (44.7%)	212 (56.4%)	259 (56.9%)	302 (60.3%)
Foreign films	1218	1244	1192	1238
Actual release	411 (33.7%)	455 (36.6%)	534 (44.8%)	448 (36.2%)
Nominal release	807 (66.3%)	789 (63.4%)	658 (55.2%)	790 (63.8%)

Note: all the percentages are calculated by the authors.
Data source: KOFIC (2020a, p. 23).

That said, the perception of France as an exemplary country that has “strict” rules against the screen monopoly is based upon the mere description of the French regulations without a proper analysis of how they actually function. It is thus crucial to compare rigorously Korea and France.

Methodology

Most existing studies simply rely on the HHI of distribution and/or exhibition sectors when discussing the screen monopoly issues. However, as argued before, this indicator is not very accurate when examining the actual screen monopoly issue which prevails at the level of films. As a result, the following alternative analysis is developed across two steps.

The analysis of the screen monopoly issue should be at the film-level. In this regard, the number of films exhibited or the number of films to which moviegoers can access is considered as the appropriate key variable for examining the anti-screen monopoly argument. This paper also employs other variables at the highest level of disaggregation, such as the number of admissions or seats, when comparing the year-round number of films exhibited at movie theatres. In addition, the number of screens is additionally taken into consideration since it imposes an essential constraint on the possible number of films that moviegoers can access.

After dealing with the monopoly issue, this paper focuses on the diversity issue which is the ultimate reason for the debate on the screen monopoly – the belief that a few commercially successful films exhaust the availability open to many other films. This paper adopts two criteria for diversity because this concept does not hold the same meaning in Korea and France. In Korea, diversity is achieved when moviegoers have access to the largest possible number of films, a definition which suggests classifying films into two categories: “hits” and “non-hits” – the first group seen as an obstacle to the second group. In France, diversity refers to the nationality of films exhibited, and in particular to the share of domestic films offered to moviegoers; what follows makes a distinction between domestic and foreign, notably US and non-US films.

Background: structure of distribution and exhibition

It is important to understand that the concentration ratio of the film distribution and exhibition sectors is not a relevant indicator of a screen monopoly in existence. In fact, when comparing Korea with other countries such as France, Germany, Japan and the US, France is the only country that has less concentrated distribution sectors than Korea as mentioned before. In other words, the Korean film industry does not appear as the “worst” case.

To gauge a sense of the market concentration *per se*, not screen monopoly, in France and Korea, it is worth looking at the share of revenues and/or admissions among the main companies in each country’s distribution and exhibition segments. As annual data can be significantly influenced by a few particularly successful films, Table 3 presents the average shares for the 4-year period 2016–2019. It shows that the level of concentration in the distribution segment is relatively similar in the two countries, but that the exhibition segment is significantly more concentrated in Korea than in France.

Table 3. The main distributors and exhibitors in France and Korea (2016–2019).

Distributors: share of revenues				Exhibitors: share of admissions or revenues			
France		Korea		France (admissions)		Korea (revenues)	
Walt Disney	16.3	CJENM	17.0	Gaumont-Pathé	22.2	CGV	49.3
Warner Bros	9.3	Walt Disney	15.8	UGC	12.2	Lotte	29.5
Universal	9.1	Lotte	10.9	CGR	10.4	Mega box	18.2
20th Fox	8.8	Show Box	8.7	Kinépolis	3.3		
Pathé Films	6.7	Fox	8.1	SAS Cineville	2.5		
Sony Pictures	5.6	Universal	8.0	Megarama	2.3		
Studio Canal[a]	5.4	NEW	7.9	MK2	2.0		
UGC Distri[a]	4.9	Warner Bros	5.8				
Gaumont	4.9	Sony	5.3				
SND (M6)	4.9	Megabox	4.8				
Concentration indexes							
CR3 share	34.7	CR3 share	43.7	CR3 share	44.8	CR3 share	97.0
HHI	702	HHI	917	HHI	897	HHI	3632
Share by nationality							
French firms	21.7	Korean firms	49.3	French firms	54.8	Korean firms	97.0
US firms	49.0	US firms	43.0	US firms	0.0	US firms	0.0

Notes: 1. Data for Korean exhibitors are based on movie theatres that are under direct control of these exhibitors; 2. In Korea, some movie theatres are not directly owned by distributors, but rather are sub-contracted; 3. CR3 share: aggregate share of the three largest companies; 4. [a] Average calculated on the years with available data.
Source: authors' calculation based on CNC (2019, p. 51) for the distributors; CNC (2019, p. 84) for the exhibitors; and KOFIC (2020a, p. 43).

The large difference in the concentration of the exhibition sector – the share of domestic exhibitors is 54.8% in France, compared to 97.0% in Korea – is clearly due to the number of cinema chains. These results would suggest that the only policies for lowering HHI in the Korean exhibition sector would be to create more cinema chains and/or to increase the number of independent movie theatres in Korea. These policies would require dramatic measures by the Korean government: a mandatory "dismantling" (disinvestment) programme of at least the largest Korean exhibition company; the opening of the exhibition market to foreign competitors, assuming that the Korean government is willing to take this "risk"; and/or the creation of incentives inducing small independent theatres to expand their market shares with the hope that they will be successful. All these policies are costly to design and implement and their results, at best, are highly uncertain; hence, this is not an advisable approach.

Here, it is interesting to look in more depth at the distribution sector *per se*. US firms take top rankings in France, while Korean firms are more visible in Korea. But the contribution of US firms in this sector is very similar in the two countries; Walt Disney has 16.3% share in France as the top-ranking company while it has 15.8% share in Korea, but only as the second top-ranking studio. Warner Bros has 9.3% share in France while Fox has 8.1% share in Korea, both have the second largest share among the Hollywood studios in their respective market. Considering the fact that the market size of both the Korean and French film industries in terms of box office revenues is close to US $1.6 billion as of 2019 (MPA, 2020), it can be assumed that the higher level of HHI in Korea is led by domestic films distributed by local firms. This is further true when the share of nationality in exhibition and distribution sectors are compared as shown in Table 3.

More importantly, the large share of US films supplied by the Hollywood studios reveals the ineffectiveness of the French anti-screen monopoly regulations as they were established to prevent US companies from enjoying a strong share of the French film market (Centre national du cinéma et de l'image animée [CNC], 2018; Parc and Messerlin, 2021b, p. 201).

The true picture of screen monopoly

As shown before, many in Korea argue that implementing the French anti-screen monopoly regulations would help overcome the screen monopoly problem in Korea. Here, it is important to understand what the French anti-screen regulation is. As a notable proportion of the films screened at French movie theatres were chosen and distributed by a handful of large distributors, exhibitors and TV stations, French policy makers claimed that this situation would threaten "free competition and the wide dissemination of the films desirable for the general interest".[1] In order to address these concerns, the 1982 Law on the audio-visual sector sketches broad guidelines for detailed commitments – *engagements* in French – to be negotiated among all participants in the French film market.

There are two major types of commitments: programming commitments (or *engagements de programmation*) and disseminating commitments (or *engagements de diffusion*). The first requires participants, who own or run several movie theatres or a multiplex, not to show the same film on more than a certain number of screens. The latter aim to promote the exhibition of European – mostly French – films as well as "rarely screened works". However, because these commitments involve clearly opposite interests among the various groups of distributors or exhibitors, they have led to compromises which have never been really satisfactory and have led to renegotiations every 4–5 years.

Keeping this description in mind, it is critical to examine the effectiveness of the French anti-screen monopoly regulations when compared with Korea; although they are rather commitments, this paper maintains the term regulations as this is what the advocates of the anti-screen monopoly utilise. In this regard, it is important to compare carefully the various aspects of the screen monopoly issue.

Numbers of films, admissions, screens and seats in Korea and France

The argument that the screen monopoly limits moviegoers' selection of films can be assessed by looking at a few key variables: the numbers of released films, admissions, screens and seats. In the context of this paper, only the newly released films are taken into consideration. Re-releases are left aside because they can result in double-counting when the data covers more than 1 year; in addition, most re-released films are available on other outlets than movie theatres, such as streaming services and online service providers.

Another important preliminary remark concerns the number of released films in Korea. As already mentioned, since 2016, there are two kinds of data for the number of released films: "actual releases" and "nominal releases" – the latter aims to be diffused through channels outside of movie theatres as noted before. The number of films with actual releases is available only for the years 2016–2019 shown in (K2), which is significantly smaller than the total number of films shown in (K1) of Table 4 – roughly 40%.

There is a striking difference between the number of films released in France and Korea. When looking initially at the number of actual releases, this figure appears smaller in Korea than in France (see [K2] and [F1]). However, a fairer comparison requires

Table 4. Annual number of films released and screens in Korea and France (2010–2019).

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	Growth rate[c]	Average[c]
Korea												
Total no. of films (K1)	426	439	631	905	1095	1176	1520	1620	1647	1739	16.4	1120
No. actual released films (K2)	–	–	–	–	–	–	578	619	730	647	3.6	644
Admissions (million) (K3)	149	160	195	213	215	217	217	220	216	227	4.1	203
No. screens (K4)	2003	1974	2081	2184	2281	2424	2575	2766	2937	3079	4.7	2430
No. seats (thousand) (K5)	349	342	359	350	372	399	421	438	450	463	3.1	394
No. actual released films/inhab.[a] (K6)	–	–	–	–	–	–	11.2	12.0	14.1	12.4	3.5	12.4
Admissions/screen[b] (K7)	74	81	94	98	94	90	84	79	74	74	−0.6	84
Screens/capita (K8)	40	39	41	43	44	47	50	53	57	59	4.4	47
Seats/screen (K9)	174	173	173	160	163	165	163	158	153	150	−1.5	162
France												
Total no. of films (F1)	579	588	614	654	663	652	716	693	683	746	2.3	659
Admissions (F2)	184	201	181	175	189	182	192	190	176	191	−0.5	186
No. screens (F3)	5465	5464	5508	5580	5647	5741	5842	5913	5981	6114	1.1	5726
No. seats (thousand) (F4)	1048	1047	1053	1065	1071	1094	1099	1119	1126	1141	0.9	1086
No. released films/inhab.[a] (F5)	8.9	9.0	9.4	9.9	10.0	9.8	10.7	10.3	10.1	11.0	0.2	10.5
Admissions/screen[b] (F6)	34	37	33	31	34	32	33	32	29	31	−1.6	33
Screens/capita (F7)	84	84	84	85	85	86	87	88	89	90	0.7	86
Seats/screen (F8)	192	192	191	191	190	191	188	189	188	187	−0.2	190

Notes: 1. Growth rate: compound annual growth rate between the average first 2 years and the average last 2 years; 2. [a] Number of released films per million of inhabitants; 3. [b] Thousands of admissions per screen; 4. [c] All growth rate and average are calculated over the years 2016–2019 in order to be comparable to the Korean figures; 5. Regarding the data for the number of films in Korea, it may not match the figures when the number of hits (Table 5) and non-hits (Table 6) are integrated. This is due to discrepancies between processed data and raw data both produced by KOFIC; 6. The number of films in Table 4 is based on processed data, while the numbers of hits and non-hits are based on raw data.

Source: authors' calculation based on Korea Box-Office Information System (KOBIS) and CNC (2021a).

adjusting for the size of the population – a significantly larger population is likely to absorb a higher number of films than a smaller one – hence to calculate the number of actual releases per capita. Over the 4 years 2016–2019, there has been an average 12.4 films per million of inhabitants released in Korean movie theatres, compared to an average 10.5 in France ([K6] and [F5], respectively). This substantial difference of 18% demonstrates that the Korean exhibition segment offers more choice to moviegoers than its French counterpart; thus, a wider film selection.

The "utilization" of screens in Korea and France

In terms of the number of screens per capita, France has 1.5 times more screens than Korea in 2019 – with 86 screens per one million of inhabitants in France compared to 47 in Korea (see [K8] and [F7]). However, despite this huge difference Korea has outperformed France since 2012 in terms of admission numbers: in other words, the more limited number of screens in Korea has been better utilised than its larger French equivalent.

Combining screens and seats is another essential aspect to consider when assessing the capacity of an exhibition market. In Table 4, the number of seats and their growth rate show the same differences between the two countries as the number of screens (see [K5] and [F4]): a much smaller number in absolute value in Korea and a significantly higher growth in Korea than in France. Still, there is an important nuance to note here; the growth of seats is smaller than the growth of screens in the two countries, but this feature is more marked in Korea than in France. Hence, the average number of seats per screen has declined more in Korea than in France over the past decade.

This decline of the average number of seats per screen in Korea occurs at such a regular pace that it is likely to reflect a conscious strategy. At first glance, a smaller seat/screen ratio is a disadvantage as it means a higher number of exhibitions in order to reach the same number of admissions for a film compared with a larger seat/screen ratio. Yet, this smaller ratio offers a strategic advantage during times when there is an increasingly abundant supply of films – as during the last decade or so. In particular, the significantly higher seat/screen ratio in France combined with a much larger number of movie theatres can generate an intrinsic underlying risk of "over-capacity" of seats when owners exhibit less attractive films.[2]

One can synthetise these results by calculating the "utilisation" of the screens defined as the number of admissions divided by the number of existing screens. If one uses the sums for the years 2016–2019 (for relying on comparable data in terms of released films), the Korean exhibition market has released 2,574 films on 2,839 screens, roughly 0.91 films per screen. In France, the number of films released is 2,838 for these 4 years. Calculating the number of screens devoted to the first releases in France requires some preliminary adjustments. Using the large number of screens in France shown by Table 4 would be inaccurate because French movie theatres exhibit many films from previous years (roughly 6,500 films every year).

Still, if the number of these films is huge, the number of screens devoted to them is small – roughly 7% of all the screens throughout the year (CNC, 2021b). In other words, the number of screens effectively devoted to new releases in France is 93% of the total number of screens, that is, 5,500 screens in 2019. The French movie theatres exhibit thus 2,838 films on 5,500 screens, or 0.51 films per screen in the same year. In short, the Korean exhibition market has 76% higher utilisation of its screens when compared with the French one; higher utilisation should be distinguished from screen monopoly.

All these comparisons do not support the criticism regarding the screen monopoly prevailing in the Korean exhibition market. They suggest that the perception of a screen monopoly in Korea is in fact the misinterpretation of a more active utilisation of the screens than – say – in France. Above all, it raises serious doubts on whether introducing the French "anti-screen monopoly" regulations in Korea could be beneficial to the Korean film industry and – more importantly – to its moviegoers.

Diversity in film market

The screen monopoly argument believes that large distributors and exhibitors are powerful enough to significantly restrict the diversity of films that are released in movie theatres. This view echoes the notion of diversity based on a "balance" between successful films ("hits") and other films ("non-hits"). In this case, the greater number of available films for moviegoers to watch is seen as more important for cultural diversity than the nationality of the films. As it is often assumed that large firms invest mostly in big-budget films in order to draw in a large number of moviegoers, their influence is expected to be particularly strong with the hits, which thus deserves a separate examination.

The performance of "hit" films

The definition of "hits" used in this paper is based on CNC (2011, p. 11) which are films that have attracted more than one million admissions during the first year of release. What follows relies thus on "hits", not "mega hits" which in theory are considered to be films attracting more than 10 million moviegoers but as yet there is no agreed standard to define mega hits as this number is more sensitive to the size of a country's population. The supporters of the anti-screen monopoly regulations believe that such provisions would allow a greater number of films to be available (or screened) at movie theatres. In this regard, it is interesting to examine whether France with its anti-screen monopoly regulations has helped the release of a greater number of films and exhibit more hits than Korea.

Table 5 does not provide evidence supporting such a hypothesis when one looks at the total number of US, domestic and non-US hits: they are very similar in Korea and France, with 489 and 513 films, respectively, over the whole decade – again, the data for Korea is based on the actual released films. However, if one takes into consideration the total population, as one should, Korea has a larger number of hits per year than France: roughly 9.6 hits per million of inhabitants (489 hits for a Korean population of 51 million of inhabitants), compared to roughly 7.6 hits per million of inhabitants (513 hits for a French population of 68 million of inhabitants) (see [K1] and [F1], respectively).

Turning to the total number of admissions for hits, it is more than 30% larger in Korea than in France over the whole decade. More importantly, although Korea and France have a similar total number of hits, Korea has a greater number of domestic hits compared with France. This significant gap can be interpreted as a sign that Korean films are more attractive than French films from the point of view of their respective domestic audience. In fact, Table 5 makes this result very clear: during the 2010s, 176 domestic hits have attracted 389 million admissions in France (see [F3] and [F7], respectively), whereas 265 Korean domestic hits have attracted 888 million admissions throughout the whole decade (see [K3] and [K7], respectively).

Still, the advocates of the anti-screen monopoly regulations would argue that this could be the sign of the market power of a few large firms in the Korean film industry. This interpretation needs thus to be scrutinised with a more detailed analysis splitting the hits into US ones and domestic titles since these two categories of films may face different levels of concentration. We can then compare more accurately the alleged inter-actions among diversity, concentration and anti-screen monopoly regulations in each of these two categories.

To undertake this properly, one needs to stress again the different meaning of "diversity" in France and Korea. In France, this expression is associated with an increase (in relative terms) of admissions (or moviegoers) for domestic films. This view reflects the concern that French films have a relatively low market share; hence more French films are seen as ensuring higher diversity – a "better" balance between French and US films. By contrast, in Korea diversity means the increase in the possibility for moviegoers to watch the largest possible number of – domestic or foreign – films at movie theatres. This view mirrors the fact that the share of domestic film admissions is larger than (or similar to) that of US films in Korea over many years; hence is not seen as a primary concern. Ignoring this critical difference between these two views would lead to a serious misinterpretation of the evolutions that have occurred over the last decade.

Without a doubt, many Koreans assume that France would show a higher number of hits exhibited – with more evenly dispersed admissions for a greater number of films – than Korea as France has a less concentrated market. Table 5 tells a different story. The number of hits is a little bit higher in France than in Korea – 51.3 per year in France and 48.9 per year in Korea on average. However, adjusting for the difference in population reverses the result: the number of Korean hits per capita would amount to 63, if one keeps constant the number in France. Furthermore, the share of the number of domestic hits among the total number of hits is 54.2% (265/489) in Korea, compared to 34.3% (176/513) in France despite the many efforts made by the French government to revive its film industry by imposing anti-screen monopoly regulations (see [K3] and [F3], respectively). If one focuses on the number of domestic and US films, it is easy to see that the dominant players are the opposite in both countries: Korea with domestic films (54.2%) whereas France with US films (62.6%) on average. Therefore, it can be said that Korea has more diversity in offering hits at movie theatres as the ratio between domestic and international films are more balanced when compared with France.

Finally, one needs to consider the number of hits from third countries if one wants to have a complete overview on the level of diversity in terms of a film's nationality. Table 5 indicates that France has a greater number of hits from third countries than Korea – nine in Korea and sixteen in France over the whole period (see [K4] and [F4]). One might consider this gap big enough to be a sign that the Korean exhibition market is less diverse than the French one with respect to films from third countries. However, this interpretation misses a key point: seven out of the total of sixteen non-US foreign hits in France

Table 5. The exhibition markets for hits: selected indicators (2010–2019).

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	Growth rate	Total or average
Korea												
No. of hits												Total
Total (K1)	43	42	52	53	47	45	51	54	53	49	2.0	489
US (K2)	19	19	17	22	24	20	26	25	24	19	1.4	215
Korean (K3)	23	23	32	30	23	23	24	28	29	30	2.8	265
Non-US (K4)	1	0	3	1	0	2	1	1	0	0	–	9
No. of admissions												Total
Total (K5)	96.5	115.2	151.5	168.6	164.1	165.6	170.0	173.0	167.6	186.1	5.9	1558
US (K6)	41.4	49.7	45.8	53.0	78.4	74.5	70.0	69.9	83.2	85.7	7.1	652
Korean (K7)	52.8	65.5	100.2	112.7	85.7	87.6	98.7	99.5	84.3	100.4	5.1	888
Non-US (K8)	2.3	0.0	5.5	2.9	0.0	3.6	1.3	3.6	0.0	0.0	–	19
Admissions per hit												Average
US (K9)	2.18	2.62	2.70	2.41	3.27	3.72	2.69	2.79	3.47	4.51	5.8	3.04
Korean (K10)	2.30	2.85	3.13	3.76	3.73	3.81	4.11	3.55	2.91	3.35	2.2	3.35
Non-US (K11)	2.29	–	1.83	2.86	–	1.78	1.28	3.64	–	–	–	1.37
France												
No. of hits												Total
Total (F1)	51	52	54	55	55	44	53	56	42	51	−1.1	513
US (F2)	31	30	31	35	33	29	34	35	31	32	0.4	321
French (F3)	19	20	22	17	20	14	18	18	11	17	−3.6	176
Non-US (F4)	1	2	1	3	2	1	1	3	0	2	–	16
No. of admissions												Total
Total (F5)	126.5	126.7	121.3	109.1	123.6	116.1	120.7	124.4	105.2	124.5	−1.1	1198
US (F6)	84.3	71.9	71.3	76.5	63.2	80.6	84.7	82.4	72.9	89.8	0.5	778
French (F7)	41.0	52.1	46.8	27.6	55.0	33.1	34.1	35.3	32.3	31.3	−4.1	389
Non-US (F8)	1.2	2.7	3.2	5	5.4	2.4	1.9	6.7	0	3.4	–	32
Admissions per hit												Average
US (F9)	2.72	2.40	2.30	2.19	1.92	2.78	2.49	2.35	2.35	2.81	0.1	2.43
French (F10)	2.16	2.61	2.13	1.62	2.75	2.36	1.89	1.96	2.94	1.84	0.0	2.23
Non-US (F11)	1.20	1.35	3.20	1.67	2.70	2.40	1.90	2.23	–	1.70	–	1.84

Notes: 1. Growth rate: compound annual growth rate between the average two first years and the average two last years; 2. Unit for admission-related sections is million.
Source: authors' calculation based on CNC (various issues) and KOBIS.

are European films. As the French exhibition market is part of the overall European film market – even if this integration is far from perfect – European films have a preferential access to the French exhibition market as best illustrated by the fact that the anti-screen monopoly regulations give them the same legal status that French films enjoy. Taking into consideration this factor suggests that the level of diversity within the Korean and French exhibition market in terms of hits from "strictly" (non-European and non-US) third countries is similar – indeed higher in Korea if one uses per capita estimates, both from the French and Korean perspectives on diversity.

The performance of "non-hit" films

When looking at the number of films and admissions for non-hit films in Korea, it is largely based on those with nominal release since, by definition, all nominal releases are non-hits in terms of admissions. The number of non-hits has grown much more sharply in Korea than in France, as can be seen in Table 6, suggesting an increasing diversity in Korea. That said, it should be stressed that the increase of non-hit films in Korea is due to the import of a large number of foreign films (see [K1] and [K5]). Many companies in Korea produce and import films for an increasing number of streaming services and Internet Protocol Television (IPTVs). By contrast, the number of domestic films in France grows significantly more than the number of foreign films in the non-hit category (see [F1] and [F4]).

Some may argue that in order to compare the number of non-hits produced by Korea and France properly, the number of non-hits with nominal release should be eliminated. However, adding these types of films when comparing non-hits does not distort the result for two reasons. First, French subsidies are systematically granted to all domestic films produced and it increases the number of films, but not necessarily their quality (Messerlin and Parc, 2017; Parc and Messerlin, 2021, p. 186). Second, a specific agreement signed under the aegis of the Ministry of Culture the so-called the *chronologie des médias* artificially inflates the number of non-hit films in French movie theatres.[3] Such an outcome is because this regulation imposes that all the films having benefitted from French public subsidies should be exhibited firstly at movie theatres even if the producers of these films want to diffuse their films through other outlets such as DVDs, cable TV and streaming services.[4] And as argued before, this provision has a stronger impact on French films than on foreign ones.

Turning the focus to admissions, their number for non-hits has slightly declined in Korea while it has slightly increased in France (see [K2] and [F2]). The most plausible explanation is that Korean moviegoers are – on average – not much interested in non-hits exhibited in movie theatres. Part of the reason for this is because they are unwilling to pay regular ticket prices to watch such titles in movie theatres as they are aware that such films will end up on other – cheaper – outlets like streaming platforms within a short period of time. However, this aspect does not support the need for anti-screen monopoly regulations as the concept of diversity is merely associated with the number of films available at movie theatres. In any case, Korea has more diversity in non-hits when compared with France.

Discussion

The previous sections have revealed that France is not in a better position than Korea in terms of restricting a screen monopoly and promoting cultural diversity; thus, it is evident

Table 6. The exhibition markets for "non-hits": selected indicators (2010–2019).

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	Growth rate (%)	Average
Korea												
No. non-hits (K1)	383	397	579	852	1048	1157	1519	1710	1810	1894	18.9	1135
Admissions for non-hits (K2)	38.4	37.8	36.0	35.8	38.9	36.8	38.1	40.0	34.3	34.9	−1.1	37
Total admission (K3)	149	160	195	213	215	217	217	220	216	227	4.1	203
No. domestic films (K4)	117	127	144	153	194	234	313	467	631	667	20.4	305
No. imported films (K5)	266	270	435	699	854	923	1206	1243	1179	1227	18.2	830
France												
No. non-hits (F1)	528	536	560	599	608	608	663	637	641	695	2.6	608
Admissions for non-hits (F2)	57.5	74.3	59.9	66.1	65.4	65.9	71.3	65.3	71.0	66.9	0.5	66
Total admission (F3)	184	201	181	175	189	182	192	190	176	191	−0.5	186
No. domestic films[a] (F4)	200	203	220	253	261	242	271	294	277	310	4.3	253
No. imported films[b] (F5)	328	333	340	346	347	366	392	343	364	385	1.4	354

Notes: 1. The distinction between actual and nominal releases of Korean films began in 2016; 2. Growth rate: compound annual growth rate between the average first 2 years and the average last 2 years; 3. The sum of the numbers between domestic and imported films shows a tiny difference with the total number of non-hits. This difference, which is due to the number of imported films, is small enough (one to three units) to be neglected all the more because all the sources used are from CNC; 4. [a] Films which are classified by CNC as "100% French" and those which are classified as "Majority French" of co-produced films are reported as domestic films; 5. [b] Films classified by CNC as "Minority French" of co-produced films are included in the category "imported films"; 6. Unit for admission-related sections is million.

Source: authors' calculation based on CNC (2021c), KOBIS and Table 5.

that Korea would gain little from introducing anti-screen monopoly regulations like those in France. Crucially, the results presented so far are based upon annual data, which contrast to other scholars and media outlets who rely upon weekly data to point out the negative impact of a screen monopoly and lack of diversity.

A more effective approach to this topic would be to compare Korea and other countries by using the weekly "turnover" for the exhibition of films – that is, the weekly admissions for a given film as a share of its overall admissions. However, it is important to set these weekly shares across a longer time frame to see how they evolve week after week for various films. This time span has an important meaning from the perspective of moviegoers. A faster turnover – the fact that the audience in a country is able to watch a movie within a short period of time than those in another country – offers the possibility of more choices for moviegoers among all the newly released films. In this sense, a faster turnover can be interpreted as a critical contribution by the exhibitors to address the screen monopoly issue.

Table 7 thus shows the shares of the box office revenues earned on a weekly basis by films since their first day of release and compares different countries with Korea. It focuses on hits since these are the films that are the ones in most demand at movie theatres. The films selected for Table 7 are the five most successful US hits in 2019. The choice of these US films minimises the distortions as they are widely distributed and well exhibited in all the countries covered.

The main result of Table 7 is that, after five weeks, a paltry 2.6% of the total revenue remains to be generated by these films in Korea. By contrast, the "rest" of the revenues in the other countries ranges from 10% to 18% – four to seven times higher than in Korea. The fact that Korea has a significantly higher turnover than any of its four competitors in 2019 supports the relatively better utilisation of Korean movie theatres as underlined in the previous sections. That said, focusing on the relatively high concentration of Korean moviegoers during weeks 1 and 2 gives the impression that a few films monopolise the Korean screens more than is the case in other countries. However, this does not take into consideration week 3 and the following weeks where the Korean movie theatres begin to exhibit other films while the movie theatres in other countries are still showing the same movies.

This is even more evident when movies of different nationalities are compared in the French and Korean film markets. For example, this paper has selected two US hits, one Korean hit and one French hit in order to take the country-specificity into account (see Table 8). When the turnover of these films in Korea and France is examined, it is clear that Korea has a quicker turnover than France regardless of the nationality of the films;

Table 7. Weekly share of total box office revenues for top five US Hits (2019).

	Week 1	Week 2	Week 3	Week 4	Week 5	Rest (after week 5)
Korea	47.7	76.6	88.8	95.1	97.4	2.6
France	28.6	54.1	70.8	78.7	86.8	13.2
UK	30.5	56.7	72.0	80.1	84.9	15.1
Japan	16.9	46.2	64.2	74.5	81.4	18.6
US	33.3	64.9	78.6	85.3	89.7	10.3

Note: The top five films are *Avengers Endgame*, *The Lion King*, *Star Wars: The Rise of Skywalker*, *Frozen II* and *Toy Story 4*.
Source: authors' calculation based on Box Office Mojo (2019).

Table 8. Weekly share of total box office revenues: comparison between Korea and France.

		Box office gross	Week 1 (%)	Week 2 (%)	Week 3 (%)	Week 4 (%)	Week 5 (%)	Week 6 (%)
Korea	*Avengers: End Game* (2019)	$105,483,265	44.5	77.7	91.0	95.7	98.6	99.1
	Frozen 2 (2019)	$95,553,295	33.4	63.3	78.9	89.3	94.4	98.3
	The Intouchables (2011)	$11,092,513	27.0	56.8	76.6	89.2	96.4	100.0
	Parasite (2019)	$71,439,010	34.7	71.4	86.3	94.4	97.9	99.6
France	*Avengers: End Game* (2019)	$62,191,621	40.2	69.9	84.1	89.2	91.6	93.4
	Frozen 2 (2019)	$53,969,743	26.5	46.5	59.1	68.7	75.9	86.7
	The Intouchables (2011)	$166,126,377	8.9	25.8	39.0	51.2	61.8	69.4
	Parasite (2019)	$15,357,435	13.7	31.4	40.5	47.7	56.2	60.1

Source: authors' calculation based on Box Office Mojo (2019).

most films achieve 90% of total admissions around weeks 3 and 4 in Korea while it takes much longer in France.

Yet some would still see Korea's rapid turnover in Table 8 as evidence that the issue of screen monopoly in Korea is more severe than it is in France. This though ignores the constraint imposed by the *chronologie des médias*. According to this agreement, films in France should be exhibited at movie theatres for at least four months (in general) regardless of their popularity. That is a strong disincentive for French movie theatres to adopt a quick turnover strategy *à la coréenne*. It can also be interpreted as limiting the film selection among moviegoers because longer screening of a film takes over the opportunity of screening other films and push moviegoers to watch films due to the lack of alternatives, not because of their intrinsic attractiveness. Again, by considering the larger population, France has more screens but with roughly a similar annual number of released films that Korea exhibits. Basically, the fast turnover in Korea cannot be seen as evidence of a screen monopoly.

To sum up, instead of the information on the short week span, a clearer and more accurate indicator should be provided based upon at least five or more weeks. Such an analysis will show that Korean movie theatres exhibit relatively more films per year, attracting a higher total number of admissions than other countries. Such a rapid "turnover" in Korea emerges thus as an essential driving force behind the better utilisation of the country's theatres shown in the previous section.

Conclusion

This paper examines the screen monopoly issue, which has attracted a lot of criticism in Korea. Such negative perceptions have emerged due to the widely prevailing belief that this practice has brought about distortive effects on the film industry, most notably in the exhibition market. To solve this issue, several scholars have looked to the anti-screen monopoly regulations in France, but without providing rigorous or persuasive evidence. In this regard, this paper scrutinises this "screen monopoly" argument from different perspectives. First, it has presented the argument put forward by Korean scholars – and largely shared in other countries – and has stressed its many theoretical and empirical shortcomings. Second, this paper has shifted the focus to two empirical questions: (1) is the situation of a screen monopoly in Korea worse than it is in France? And (2) are French anti-screen monopoly regulations effective?

To answer these questions, this paper compares Korea and France at two levels: the overall exhibition segment and that of the hits and non-hits categories since these two categories face very distinct levels in terms of concentration. These detailed analyses prove the ineffectiveness of the French anti-screen monopoly and recommend not to introduce anti-screen monopoly regulations *à la française* in Korea.

Furthermore, an interesting concept is introduced in this paper – the film "turnover" – which puts the analysis of the screen monopoly in the most appropriate time frame. The choice is between either reserving many screens to show a film over a short period of time or exhibiting the film in question on a smaller number of screens for a longer duration. Korea emerges as the leading country in terms of fast turnover, which counters the impression that its screens are occupied by a few films. By contrast, France demonstrates a significantly slower turnover.

Although this paper focuses on only screen monopoly and cultural diversity, its findings raise doubts over the effectiveness of government-centred policies in cultural industries that are prevailing in many countries, notably in Europe. It also results in two critical points. First, it suggests the need to re-examine the effectiveness of a number of public policies that aim to strengthen cultural industries in the context of globalisation and digitisation. Second, it highlights the need for rigorous analyses on the extent to which the Korean cultural industries can deliver new and meaningful messages to countries that desire to enhance the competitiveness of their cultural industries – hence can add to cultural creativity and diversity around the world.

Notes

1. See *Le médiateur du cinéma* for further information.
2. CNC publishes data on the "occupancy rate" – the ratio of total admissions per the total number of seats available. The latter is calculated as the number of sessions times the number of seats for each screen (CNC 2020, p. 14). The French rate is remarkably low – 15% on average for the last decade – and it is steadily decreasing, supporting the hypothesis of a large overall overcapacity of the French exhibition sector.
3. *Chronologie des médias* imposes a rigid timetable for exhibiting films. It splits all the outlets showing movies into six "windows" – from movie theaters to free streaming platforms (as of February 9, 2022). Films can accede to each of these various windows only in a sequential manner and for a predetermined duration of time according to this rigid mandatory sequence. The first window is for movie theaters.
4. This condition applies to all the films which benefit from "automatic aid" granted by the CNC. Regarding the number of films that have (not) benefitted from these aids, detailed data are not available. However, the current conditions for eligibility for automatic aid opens up to a wide range of beneficiaries. More importantly, there are only four films out of 1,729 that did not follow *Chronologie des médias* during the period of 2015–2021 according to CNC (2021d). This fact signifies that almost all the French films have benefitted from the subsidies.

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ORCID

Jimmyn Parc http://orcid.org/0000-0002-4836-460X
Patrick Messerlin http://orcid.org/0000-0003-4660-9156

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