Playing to the World's Biggest Audience:
The Globalization of Chinese Film and TV

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Introduction

Media Capital in Chinese Film and Television

At the turn of the twenty-first century, feature films such as *Crouching Tiger*, *Kung Fu Hustle*, and *Hero*—each of them coproduced with major Hollywood studios—marched out of Asia to capture widespread acclaim from critics, audiences, and industry executives. Taken together they seemed to point to a new phase in Hollywood's ongoing exploitation of talent, labor, and locations around the globe, simply the latest turn in a strategy that has perpetuated American media dominance in global markets for almost a century and contributed to the homogenization of popular culture under the aegis of Western institutions.[1] These movies seem to represent the expanding ambitions of the world's largest movie studios as they begin to refashion Chinese narratives for a Westernized global audience. Yet behind these marquee attractions lies a more elaborate endgame as Hollywood moguls reconsider prior assumptions regarding the dynamics of transnational media institutions and reassess the cultural geographies of media consumption. For increasingly they find themselves playing not only to the Westernized global audience but also to the world's biggest audience: the Chinese audience.

With more than a billion television viewers and a moviegoing public estimated at more than two hundred million, the People's Republic of China (PRC) figures prominently in such calculations. Just as compelling, however, are the sixty million "overseas Chinese" living in such places as Taiwan, Malaysia, and Vancouver. Their aggregate numbers and relative prosperity make them, in the eyes of media executives, a highly desirable audience, one comparable in scale to the audience in France or Great Britain. Taken together, Chinese audiences around the globe are growing daily in numbers, wealth, and sophistication. If the twentieth century was—as *Time* magazine founder Henry Luce put it—the American century, then the twenty-first surely belongs to the people that Luce grew up with, the Chinese. Although dispersed across vast stretches of Asia and around the world, this audience is now connected for the very first time via the intricate matrix of digital and satellite media.

Rupert Murdoch, the most ambitious global media baron of the past twenty years, enthusiastically embraced the commercial potential of Chinese film and television when in 1994 he launched a stunning billion-dollar takeover of Star TV, Asia's first pancontinental telecaster, founded only three years earlier by Li Ka-shing, Hong Kong's richest tycoon. Yet if Western executives are sharpening their focus on Chinese audiences, Asian entrepreneurs have been equally active, expanding and refiguring their media services to meet burgeoning demand, so that today, in addition to Star, hundreds of satellite channels target Chinese audiences in Asia, Europe, Australia, and North America, delivering an elaborate buffet of news, music, sports, and entertainment programming. Among Star's leading competitors is TVB, a Hong Kong-based media conglomerate built on the foundations of a transnational movie studio and now the most commercially successful television station in southern China. Its modern state-of-the-art production facilities and its far-reaching satellite and video distribution platforms position it as a significant cultural force in Europe, Australia, and North America. Equally impressive, Taiwanese and Singaporean media enterprises are extending their operations abroad in hopes of attracting new audiences and shoring up profitability in the face of escalating competition, both at home and abroad. Finally, PRC film and TV institutions, though still controlled by the state and therefore constrained by ideological and infrastructural limitations, are globalizing their strategies, if not yet their operations, regularly taking account of commercial competitors from abroad and aiming to extend their reach as conditions allow.

Based on in-depth interviews with a diverse array of media executives, this book peeks behind the screen to examine the operations of commercial film and television companies as they position themselves to meet the burgeoning demands of Chinese audiences.[2] It includes stories of Hong Kong media moguls Run Run Shaw and Raymond Chow as well as their junior counterparts, Thomas Chung and Peter Chan; of Rupert Murdoch and his enigmatic mainland partner, Liu Changle; of Sony chair Nobuyuki Idei and his Connecticut whiz-kid, William Pfeiffer. It also includes tales of legendary Asian billionaires, such as Li Ka-shing, Koo Chen-fu, and Ananda Krishnan, lured by the scent of fresh new markets, as well as stories of aspiring billionaires Chiu Fu-sheng and Richard Li, each determined to find a seat at the table for what is becoming one of the most high-stakes media plays of the new millennium.

But this volume is more than a collection of colorful accounts of personal and corporate ambition; it is furthermore a reflection on the shifting dynamics of the film and television industries in an era of increasing global connectivity. For several centuries, the imperial powers of the West exercised sway over much of the world by virtue of their economic and military might. In time, cultural influence came to figure prominently in Western hegemony, as the production and distribution of silver screen fantasies helped to disseminate capitalist values, consumerist attitudes, and Anglo supremacy. Likewise, Western news agencies dominated the flow of information, setting the agenda for policy deliberations worldwide. Indeed, throughout the twentieth century, media industries were considered so strategically significant that the U.S. government consistently sought to protect and extend the interests of NBC, Disney, Paramount, and other media enterprises. All of which helps to explain why Hollywood feature films have dominated world markets for almost a century and U.S. television has prevailed since the 1950s. Besides profiting from government favoritism, U.S. media has benefited from access to a large and wealthy domestic market that serves as a springboard for their global operations. By comparison, for most of the twentieth century, the European market was splintered, and the Indian and Chinese markets suffered from government constraints and the relative poverty of their populations. Yet recent changes in trade, industry, politics, and media technologies have fueled the rapid expansion and transformation of media industries in Asia, so that Indian and Chinese centers of film and television production have increasingly emerged as significant competitors of Hollywood in the size and enthusiasm of their audiences, if not yet in gross revenues.

In particular, Chinese film and television industries have changed dramatically since the 1980s with the end of the Cold War, the rise of the World Trade Organization, the modernization policies of the PRC, the end of martial law in Taiwan, the transfer of Hong Kong to Chinese sovereignty, the high-tech liberalization of Singapore, the rise of consumer and youth cultures across the region, and the growing wealth and influence of overseas Chinese in such cities as Vancouver, London, and Kuala Lumpur. Consequently, media executives can, for the very first time, begin to contemplate the prospect of a global Chinese audience that includes more moviegoers and more television households than the United States and Europe combined. Many experts believe this vast and increasingly wealthy Global

China market will serve as a foundation for emerging media conglomerates that could shake the very foundations of Hollywood's century-long hegemony.[3]

Despite these changes, Hollywood today is nevertheless very much like Detroit forty years ago, a factory town that produces big, bloated vehicles with plenty of chrome. As production budgets mushroom, quality declines in large part as a result of institutional inertia and a lack of competition. Like Detroit, Hollywood has dominated for so long that many of its executives have difficulty envisioning the transformations now on the horizon. Because of this myopia, the global future is commonly imagined as a world brought together by homogeneous cultural products produced and circulated by American media, a process referred to by some as Disneyfication.[4] Other compelling scenarios must be considered, however. What if, for example, Chinese feature films and television programs began to rival the substantial budgets and lavish production values of their Western counterparts? What if Chinese media were to strengthen and extend their distribution networks, becoming truly global enterprises? That is, what if the future were to take an unexpected detour on the road to Disneyland, heading instead toward a more complicated global terrain characterized by overlapping and at times intersecting cultural spheres served by diverse media enterprises based in media capitals around the world? *Playing to the World's Biggest Audience* explains the histories and strategies of commercial enterprises that aim to become central players in the Global China market, and in so doing it provides an alternative perspective to recent debates about globalization.

Transcending the presumption that Hollywood hegemony is forever, this volume joins a growing literature that is beginning to offer alternative accounts of global media.[5] *Playing* describes the challenges and opportunities that confront Chinese commercial media, and it shows, unexpectedly, that these industries are nurturing a fertile breeze of democratization that is wafting across Asia today. The winds of change are gusty and unpredictable, nevertheless, and sometimes given to dramatic reversals. After more than a decade of torrid expansion, commercial media enterprises were hit hard by the Asian financial crisis of 1997, the dotcom meltdown of 2000, and a dramatic escalation of digital piracy. By the end of the last century, Chinese media enterprises were for the very first time thoroughly globalized in outlook but had slowed the pace of their expansion while seeking to consolidate their operations and reformulate their business plans. The focus of this book therefore is on the wave of globalization during the 1990s and early 2000s,

Stephen Chow stars in *Kung Fu Hustle*, a coproduction between China Film and Columbia Pictures. Courtesy Sony Pictures Classic.

providing a context for analyzing the current constraints and future opportunities of these industries. It focuses furthermore on commercial media enterprises, although some discussion of state media in the PRC is offered to present a more inclusive account of the market dynamics driving Chinese media. In all, my aim is to portray the ways in which successful Chinese media enterprises have adapted—at times grudgingly or haphazardly—to the shifting social and institutional dynamics of the global millennium.[6]

By venturing into the realm of transnational media, markets, and culture, this book traverses a terrain of critical research that has been strongly influenced by theories of media imperialism. Two of the early proponents of this approach, Thomas Guback and Herbert Schiller, published contemporaneous assessments of international film and television in the late 1960s, providing foundational explanations of the ways in which American media institutions extended their influence overseas during the twentieth century.[7] Both describe self-conscious collaboration between media executives and government officials seeking cultural, commercial, and strategic influence abroad. Ariel Dorfman and Armand Mattelart elaborated this approach by showing how national elites in South America were complicit with practices that promoted cultural hegemony of leading industrialized nations.[8] Karl Nordenstreng and Tapio Varis furthermore contributed potent empirical evidence of television programming exports from the West to the rest of the world, arguing that trade imbalances were part of larger structural patterns of dominance.[9] Throughout the 1970s and 1980s this body of scholarship flourished, asserting that the United States and its European allies control the international flow of images and information, imposing media texts and industrial practices on unwilling nations and susceptible audiences around the world. According to this view, Western media hegemony diminishes indigenous production capacity and undermines the expressive potential of national cultures, imposing foreign values and contributing to cultural homogenization worldwide.

The basic unit of analysis for researchers of media imperialism was the modern nation-state, which meant that domination was usually figured as a relationship between countries, with powerful states imposing their will on subordinate ones, especially in news reporting, cinematic entertainment, and television programming. On the basis of data gathered in the 1960s and 1970s, when American media had few international competitors, media imperialism's founding scholars initially anticipated enduring relations of domination, presuming that media exporters would be able to perpetuate their structural advantages. So influential was this critique that it helped to inspire an energetic reform movement among less developed nations, calling for the New World Information and Communication Order (NWICO), a campaign that crested in the 1980s with a set of United Nations reform proposals that would have sailed through the General Assembly if not for the fierce opposition of the Reagan and Thatcher governments, both champions of "free flow" over the reformers' demands for "fair and balanced flow."[10] This neoliberal, Anglo-American alliance thoroughly undermined the momentum behind NWICO and furthermore mounted a counteroffensive aimed at promoting the marketization of media institutions around the world.

When this concerted political assault on NWICO started to emerge from the political right, scholars on the left also began to critically reexamine some of the essential tenets of the media imperialism thesis. One of the first and most telling critiques was posed by Chin-Chuan Lee, a young scholar from Taiwan who interrogated the theoretical consistency and empirical validity of the media imperialism hypothesis by considering case studies of media in Canada, Taiwan, and the People's Republic of China.[11] Lee argued that foundational assumptions, such as a correspondence between economic domination and media domination, simply did not hold up under close scrutiny. Canada, a wealthy developed nation, was thoroughly saturated by

Hollywood media, while Taiwan, a thoroughly dependent and less developed nation, had established a relatively independent media system that nevertheless failed to nurture "authentic" local culture, preferring instead commercial hybrid forms of mass culture. The PRC, although least developed of the three, was even more removed from Hollywood domination but thoroughly authoritarian, making it the most elitist and least popular media system at the time. Supporting neither free flow doctrines nor the media imperialism critique, Lee argued for middle-range theories and regulatory policies that would be sensitive to the complexities of specific local circumstances.

Scholars in cultural studies and postcolonial studies also began to question media imperialism, especially the presumption that commercial media industries had clear and uniform effects on audiences. Might audiences read Hollywood's dominant texts "against the grain," they wondered? Might they be more strongly influenced by family, education, and peer groups than by foreign media? Critics also challenged the presumption that all foreign values have deleterious effects, noting that the emphasis on aspiration and agency found in many Hollywood narratives might actually have positive effects among audiences living in social systems burdened by oppressive forms of hierarchy or patriarchy or both.[12] Moreover, critics pointed to the media imperialism school's troubling assumption that *national* values were generally positive and relatively uncontested, arguing, for example, that in the case of India, national media tended to cater to Hindu elites at the expense of populations from diverse cultural and linguistic backgrounds, such as Tamil and Telegu.[13] Moreover, they pointed out that cultures are rarely pure, autonomous entities, since most societies throughout history have interacted with other societies, creating hybrid cultural forms that often reenergize a society by encouraging dynamic adaptations.[14] According to these critics, media imperialism's notion of a singular, enduring, and authentic national culture simply overlooks the many divisions within modern nation-states, especially in countries that emerged with borders imposed by their former colonial masters, such as Indonesia and Nigeria. Overall, cultural studies scholars pointed out that media imperialism's privileging of "indigenous culture" tends to obscure the complex dynamics of cultural interaction and exchange.

Empirical research data furthermore began to demonstrate that the dominance of Western media might be diminishing. As television industries around the world matured, audiences increasingly showed a preference for national and regional productions, especially in news, talk, and variety formats but also in drama and comedy. In Latin America, for example, Peruvian TV audiences tend to prefer Mexican or Venezuelan telenovelas to Hollywood soap operas.[15] Further complicating these scholarly debates was the growing impact of new media technologies, with VCRs and satellites beginning to expand the range and quantity of available films and television programming in the 1980s, a trend that was further amplified by digital media in the 1990s. Concurrently, the fall of the Berlin Wall, demonstrations at Tiananmen, and the demise of authoritarian regimes in countries such as Taiwan and South Korea led numerous critics to observe that a revolution in communication technologies seemed to be facilitating a wave of cultural and political transformations.[16] When these transformations were coupled with dramatic changes in shipping and transportation as well as the continuing march of neoliberal free trade policies, popular and scholarly critics began to contemplate a seismic shift from the existing state-based international system to a nascent global order, one that was more open, more hybrid, and more thoroughly interconnected than any previous communication system.

Since the 1980s, the number of media producers, distributors, and consumers has grown dramatically, first in Europe and then in Asia, with China and India adding almost two billion new viewers during this period. Although powerful global media conglomerates were active contributors to these trends, local, national, and regional media firms expanded rapidly as well. In India, Rupert Murdoch's Star TV challenged the state's television monopoly only to find itself beleaguered in turn by dozens of new indigenous competitors, many of them telecasting in subaltern languages, all of them commercially driven.[17] Such developments complicated media imperialism's structural notions of center and periphery, for it became increasingly difficult to argue that the United States was engaged in a centralized and coherent project to sustain its cultural dominance around the world. Instead, Western media companies such as Star TV were rapidly localizing their programming and institutional practices so as to adapt to competitive forces in places like India. Though Star's original intention was to penetrate and dominate subcontinental markets with Western technology and Hollywood programming, the organization nevertheless found itself pulled into lively competition with creative and competitive Indian media enterprises. As in many parts of the world, Star was pressed to localize its operations at the very same time that South Asian telecasters were becoming more globalized in their perspectives and practices. Rather than exhibiting concrete patterns of domination and subordination, Indian media institutions at a variety of levels seemed to be responding to the push-pull of globalization, since increasing connectivity inspired significant changes in textual and institutional practices. As we shall see, similar dynamics took place in Chinese media, auguring a growing fascination with globalization among Asian media executives and creative talent since the 1990s.

Globalization of media therefore should not be understood reductively as cultural homogenization or Western hegemony. Instead, it is part of a larger set of processes that operate translocally, interactively, and dynamically in a variety of spheres: economic, institutional, technological, and ideological.[18] As John Tomlinson observes, globalization "happens as the result of economic and cultural practices which do not, of themselves, aim at global integration, but which nonetheless produce it. More importantly, the effects of globalization are to weaken the cultural coherence of all nation-states, including the economically powerful ones—the 'imperialist powers' of a previous era."[19] In other words, unlike theories of media imperialism that emphasize the self-conscious extension of centralized power, globalization theories suggest that the world's increasingly interconnected media environment is the outcome of messy and complicated interactions across space. What globalization theorists have failed to produce, however, is a persuasive account of the most significant forces driving these processes and a clear explanation of why some places become centers of cultural production and therefore tend to be more influential in shaping the emerging global system.

This concern with *location* is perhaps the most significant and enduring continuity between the media imperialism and globalization schools of scholarship. Where and why do certain locations emerge as significant centers of media production? What is the extent of their geographical reach? How do spatial dynamics influence power valences among groups, institutions, and societies? Whether stated explicitly or implicitly, these are the central concerns that continue to stimulate most of the research on international media. Although Hollywood is perhaps no longer perceived as a singular cultural force worldwide, issues of power and influence are nevertheless matters of ongoing concern. Who has the power to produce, to distribute, and to prefer particular images and ideas? To what extent might we expect alternative centers of cultural production, such as Cairo, Mumbai, and Hong Kong, to flourish and prosper? In essence, how might we begin to map the complicated contours and practices of global media?

My approach to such questions in this book is both empirical and theoretical. On the one hand, I examine the history and operations of the major commercial Chinese film and television companies, portraying the discourse of media personnel as they reflect on past performance, current circumstances, and future prospects of their firms. And on the other hand, I step back from industry discourse to ponder the tendencies and patterns that seem to be at work in contemporary media. Central to my analysis throughout are several hypotheses regarding the operations of *media capital,* directing attention to the dynamics of accumulation, agglomeration, and circulation. In the section that follows I explain my use of the term, employing examples from familiar Western contexts in order to elucidate core concepts. Western contexts are, of course, more familiar simply because their media industries have received far more attention than commercial media in Asia. This volume is one attempt to remedy that imbalance, but before proceeding I wish to explain the dynamics of media capital in the West, both as a way to introduce the concept and as a way to provide a basis for comparison with Chinese media. Furthermore, I begin with this assessment because Hollywood, as we shall see, has been one of the most powerful and enduring centers of media capital, consequently influencing Chinese media as well as Arab, Indian, and Latin American media. It is nevertheless important to reiterate that Hollywood hegemony is far more tenuous than it might appear, and the growing significance of Chinese commercial media is but one significant example of the ways in which media production and circulation are changing worldwide.

When describing the terrain of contemporary culture, critics often invoke such adjectives as *fractal, disjunctive,* and *rhizomatic,* words that aim to characterize a complex terrain of textual circulation, reception, and appropriation in the "postmodern era."[20] Even though these adjectives may aptly describe a rupture with prior cultural regimes, the industries that produce popular texts—in particular screen industries—have followed fairly consistent patterns of operation for almost a century. The amount of textual production may have increased dramatically, and the patterns of circulation may have grown ever more complicated, but the spatial dynamics of media capital have remained fairly consistent, playing a structuring role in the film and broadcasting industries since the early twentieth century. Most prominently, media capital operates according to (1) a logic of accumulation, (2) trajectories of creative migration, and (3) forces of sociocultural variation.

The logic of accumulation is not unique to media industries, since all capitalist enterprises exhibit innately dynamic and expansionist tendencies. As David Harvey points out, most firms seek efficiencies through the concentration of productive resources and through the extension of markets so as to utilize their productive capacity fully and realize the greatest possible return. These tendencies are most explicitly revealed during periodic downturns in the business cycle, when enterprises are compelled to intensify production or extensify distribution or both in order to survive. Such moments of crisis call for a "spatial fix," says Harvey, because on the one hand capital must concentrate and integrate sites of production to reduce the amount of time and resources expended in manufacture, and on the other hand it must increase the speed of distribution to reduce the time it takes to bring distant locales into the orbit of its operations.[21] These *centripetal* tendencies in the sphere of production and *centrifugal* tendencies in distribution were observed by Karl Marx more than a century ago when he trenchantly explained that capital must "annihilate space with time" if it is to overcome barriers to accumulation.[22] As applied to contemporary media, this insight suggests that even though a film or TV company may be founded with the aim of serving particular national cultures or local markets, it must over time redeploy its creative resources and reshape its terrain of operations if it is to survive competition and enhance profitability.[23] Implicit in this logic of accumulation is the contributing influence of the "managerial revolution" that accompanied the rise of industrial capitalism.[24] Indeed, it was the intersection of capitalist accumulation with the reflexive knowledge systems of the Enlightenment that engendered the transition from mercantile to industrial capitalism. Capitalism became more than a mode of accumulation; it also became a disposition toward surveillance and adaptation, since it continually refined and integrated manufacturing and marketing processes, achieving efficiencies through a concentration of productive resources and through the ongoing extension of delivery systems.

The history of the American cinema—the world's most commercial and most intensively studied media industry—provides an instructive example of these core tendencies.[25] During the first decade of the twentieth century, U.S. movie exhibitors depended on small collaborative filmmaking crews to service demand for filmed entertainment. Yet as theater chains emerged, as distribution grew more sophisticated, and as competition intensified, movie companies began to centralize creative labor in large factorylike studios with an eye toward improving quality, reducing costs, and increasing output. By refiguring the spatial relations of production, managers concentrated the creative labor force in a single location where it could be deployed among a diverse menu of projects under the guidance of each studio's central production office. Inspired by Taylorism, then in vogue among industrial manufacturers, the major film companies furthermore separated the domains of planning and execution, creating a blueprint for each film that guided the work of specialized craftspeople in lighting, makeup, and dozens of other departments deployed across the studio lot. As American cinema entered this factory phase during the 1910s, the intensification of production accelerated output and yielded cost efficiencies, providing theater operators around the country with a dependable flow of quality products.[26] It also increased fixed capital outlays dramatically, which meant that selecting a *location* for one's studio became a matter of significant strategic concern. Although today Hollywood's emergence as the moviemaking capital of the world seems almost preordained, one must nevertheless ask, why Hollywood?

In the early days of the American movie industry, filmmakers operated close to their major exhibition markets and close to related entertainment industries that might be tapped for creative talent. New York and Chicago were prominent centers of production initially, but both suffered from weather limitations during the winter months, making it difficult to shoot exterior scenes on low-light days. Companies therefore seasonally dispatched filmmaking crews to southern climates, such as Florida, Cuba, New Orleans, and, of course, California. So common were these pilgrimages that this sunshine circuit soon spawned the growth of resident creative communities, and by 1911 Southern California boasted more than fifteen thousand film-related jobs.[27] Consequently, filmmaking operations were initially dispersed across the country for a variety of reasons, but when managers began to consider investment in a single filmmaking factory, their attention shifted to the West Coast for a number of reasons.

Weather was no doubt a factor, since production schedules at studios in northern climates were interrupted on a seasonal basis. Conversely, some southern locales, such as Florida, Cuba, and Louisiana, presented problems during the summer months, when, lacking air conditioning, they suffered from oppressive heat and humidity. Southern California, on the other hand, remained temperate year-round and enjoyed the added benefit of diverse topography for location shooting. A sizable skilled-labor pool was already in place, and the West Coast provided a relatively remote location in which to sequester and discipline screen stars to the factory routines of the studio. Free from the temptations and distractions of other cultural venues, contract talent put in long workdays, focusing their energy primarily on the film business. California's remote location was also attractive in relation to legal pressures exerted during the early years of film production by patent holders who controlled key technologies used in cameras, projectors, and film stock. In the freewheeling culture of the West Coast, filmmakers could ply their trade with greater attention to narrative concerns than to legal niceties. Movie entrepreneurs were furthermore attracted by inexpensive real estate prices, which made it possible to buy up vast tracts of land where

they could strategically deploy interrelated departments (e.g., wardrobe, makeup, scenery) on a single studio lot. Like the Ford Motor Company at River Rouge, the major studios methodically integrated productive operations so as to improve quality and intensify the tempo of output. For all of these reasons, Hollywood, despite its relative geographical isolation, proved to be an appealing locale for centralized filmmaking facilities.

Soon the capital-intensive factory model prevailed with all the major movie companies, but it is nevertheless important to note that filmmaking employees were creating distinctive *prototypes*, unlike the auto or steel industries' redundant batches of products with interchangeable parts. This is a significant distinction, since some critics mistakenly refer to mass production as the guiding principle of Hollywood's studio era, when instead, as Janet Staiger points out, it is more appropriate to say that the studios employed a detailed "division of labor with craftsmen collectively and serially producing a commodity," and each commodity was relatively unique, even if production routines grew increasingly standardized and even if the films were intended for mass audiences.[28]

Not only was film production fairly distinctive among forms of industrialized manufacturing, but so too was film distribution, since movies are what economists refer to as public goods.[29] That is, each feature film is a commodity that can be consumed without diminishing its availability to other prospective customers. And given the relatively low costs of reproducing and circulating a film print when compared with the costs of creating the prototype, it behooves the manufacturer to circulate each artifact as widely as possible, thereby encouraging the establishment of an expansive distribution infrastructure. Unlike other cultural industries that needed to be close to their live audiences and patrons (e.g., vaudeville) and unlike industrial manufacturers, who incurred substantial shipping costs for their finished products (e.g., automobiles), movie studios could dispatch their feature films expansively and economically. The key aim of Hollywood's distribution apparatus was therefore to stimulate audience demand and ensure access to theaters in far-flung locales. In the United States they achieved the latter by establishing theater chains and collaborating with other major exhibitors.[30] Overseas markets offered another attractive opportunity early on when "silent films" circulated across international borders with relative ease. Consequently, American movie distribution operations grew ever more expansive while their European competitors were suffering through World War I and the ensuing economic morass of the 1920s. Seizing the moment, American companies amplified their market power by establishing overseas sales offices, setting in place a circulation network so durable that even the arrival of sound technology in the late 1920s failed to undermine the profitability of Hollywood feature films in non-English-speaking markets.[31] During the 1910s and 1920s, these centripetal and centrifugal tendencies of media capital unfolded in relatively unmitigated form before local censorship boards in the United States and trade tariffs abroad began to challenge the spatial logic of accumulation. By the end of 1920s, Hollywood was such a dominant force that the only hope for fledgling competitors was to carve out parallel spheres of operation, ones that were often protected by government policies or by cultural impediments that kept Hollywood at bay.

The second principle of media capital emphasizes trajectories of creative migration, since audiovisual industries are especially reliant on creativity as a core resource. Recurring demand for new prototypes requires pools of labor that are self-consciously motivated by aesthetic innovation as well as market considerations. Yet the marriage of art and commerce is always an uneasy one, especially in large institutional settings, and therefore the media business involves placing substantial wagers on forms of labor that are difficult to manage. As Asu Aksoy and Kevin Robins observe, "Whether the output will be a hit or a miss cannot be prejudged. However, the golden rule in the film business is that if you do not have creative talent to start with, then there is no business to talk about at all, no hits or misses."[32] Indeed, attracting and managing talent is one of the most difficult challenges that screen producers confront. In the sphere of the firm, this involves offering attractive compensation and favorable working conditions, but in a broader sphere it also requires maintaining access to reservoirs of specialized labor that replenish themselves on a regular basis, which is why media companies tend to cluster in particular cities.[33]

Nevertheless, such centers of creativity rarely emerge strictly as a response to market forces; therefore, history suggests that we should look beyond the logic of accumulation to understand patterns of creative migration. During the premodern era, artists and craftspeople congregated at sites where sovereigns and clergy erected grand edifices or commissioned regular works of art. Patronage drew artists to specific locales and often kept them in place for much of their working lives, and they, in turn, passed their skills along to succeeding generations and to newly arrived migrants. Artistic labor in this context was no doubt devotional in certain respects, influencing an artist's training and career. One might imagine that spiritual inspiration and feudal relations of patronage, rather than market forces, significantly influenced trajectories of creative migration during this period, but also important is acknowledgment of the tendency of artists to seek out others of their kind. Artists are drawn to colocate with their peers because of the mutual learning effects engendered by such proximity.

As the bourgeoisie rose to prominence in the early modern era, commercial cities became new centers of artistic production and exhibition, even though preexisting centers retained residual prestige among the cognoscenti.[34] Industrialists built performance venues, established galleries, and subsidized educational institutions, all of which enhanced the cultural capital of the emergent entrepreneurial class and attracted fresh talent to cities such as Berlin, New York, and Shanghai. Popular culture was layered over this topography of the fine arts, further elaborating the trajectories of migration, since scarce resources and dispersed populations made it difficult for popular artists and performers to subsist in any one locale. Instead, they established circuits of recurring migration, playing to crowds in diverse towns and villages. These circuits were formalized in the nineteenth century by booking agents, who rationalized the scheduling of talent across a regional chain of performance venues. The apex of each circuit was located in a major city that provided exposure to the wealthiest and most discriminating audiences, as well as providing cross-fertilization with other domains of the creative arts.[35] This historical sketch suggests that the spatial circulation of performers and the rise of creative centers were shaped by diverse practices that were increasingly rationalized and commodified during the nineteenth century.

Interestingly, the rise of Hollywood confounded these historical patterns, for unlike preceding nodes of creativity, Los Angeles was neither a center of the fine arts nor the apex of a prominent performance circuit. Movie executives no doubt accepted Southern California's relative isolation from the leading cultural institutions of the United States because of other attractions and because cinema itself had become a powerful magnet for aspiring young talent, having captured the imagination of millions via fan magazines and the promotional machinery of the industry. The elixir of cinematic stardom drew tens of thousands to California, luring them with dreams that were no doubt as fantastic as those entertained by the gold rush generation only decades before. As feature film production facilities began to congregate in Southern California, the area became the undisputed apex of creative migrations in the movie business. This newfound cultural prominence was challenged, however, by a 1948 U.S. Supreme Court ruling that forced the major studios to relinquish ownership of their theater chains. Without assured outlets for their products and without regular cash flow to underwrite new movie projects, the future prospects of the industry seemed doubtful. When the studios began to sell off their theaters, they also began to cut back their production facilities and their contract laborers, leading some observers to wonder if the industry itself might collapse in the face of growing competition from television entertainment, then based at network headquarters in New York.[36] As land and labor costs in Southern California spiraled dramatically upward during the latter half of the twentieth century, industry observers periodically warned that "runaway productions" were threatening to undermine Hollywood's status as movie capital of the world.[37]

Why, then, does Hollywood continue to act as a magnet for cultural labor? One might suggest that, like prior transitions, the residual aura of the city helps to sustain its status as a center of creative endeavor. Although this may indeed have some effect, geographers Michael Storper and Susan Christopherson contend that more important is the disintegrated (or flexible) mode of production in the movie industry, which actually encourages and sustains the agglomeration of creative labor, because constant changes in product output require frequent transactions among contractors, subcontractors, and creative talent. They show that the number of interfirm transactions in the movie business has grown dramatically over the past fifty years at the very same time that the scale of transactions has diminished, indicating that many small subcontractors now provide the studios with crucial services, such as wardrobe, set construction, and lighting, as well as key talent, with many stars now incorporated as independent enterprises rather than as contract labor. Storper and Christopherson argue that this pattern of disintegration encourages studios to employ *local* subcontractors and talent, because proximity allows directors and managers to oversee outsourced creative labor and make changes more easily and more frequently as work progresses. As for the workers, they cluster around Hollywood, where studios and subcontracting firms are based, since it helps them "offset the instability of short-term contractual work by remaining close to the largest pool of employment opportunities."[38]

Geographer Allen J. Scott extends this principle of talent agglomeration to industries as diverse as jewelry, furniture, and fashion apparel, arguing that manufacturers of *cultural* goods tend to locate where subcontractors and skilled laborers form dense transactional networks. Besides apparent cost efficiencies, Scott points to the mutual learning effects that stem from a clustering of interrelated producers. Whether through informal learning (such as sharing ideas and techniques while collaborating on a particular project) or more formal transfers of knowledge (craft schools, trade associations, and awards ceremonies), clustering enhances product quality and fuels innovation. "Place-based communities such as these are not just foci of cultural labor in the narrow sense," observes Scott, "but also are active hubs of social reproduction in which crucial cultural competencies are maintained and circulated."[39]

This agglomeration of labor encourages path-dependent evolution, such that small chance events or innovations may spark the appearance of a culture industry in a particular location, and clustering then engenders a growth spiral, because creative labor's migration to the region in search of work further enhances its attraction to other talent. Locales that fail to make an early start in such industries are subject to "lock-out," since disrupting the dynamics of agglomeration is difficult, even with massive infusions of capital or government subsidies. Scott suggests that the only way a new cluster might arise is if its producers offer an appreciably distinctive product line.

Much of the scholarship regarding labor agglomeration and transaction networks was written in response to the dramatic success of fashion industries in the "Third Italy" during the 1980s and 1990s, when analysts sought to theorize distinctions between Fordist and post-Fordist modes of industrial organization.[40] Although this literature is enormously insightful, it is important to note that most of it tends to emphasize the *recent* behaviors of labor markets while obscuring the historical patterns of creative migration mentioned earlier. For example, Scott analyzes Paris as a center of cultural production but only vaguely refers to the historical factors ("the small chance events") that initiated the clustering of creative labor in the French capital, factors such as the absolutist monarchy and its successor, the equally centralized imperialist regime of the nineteenth century, both of which fostered systems of artistic patronage that attracted talent from far and wide. Likewise, the Third Italy arose on a foundation laid by craft traditions stretching back to the transcontinental merchant economy of the Middle Ages. In both instances, the initial agglomeration of labor preceded post-Fordism and even Fordism itself.

It therefore seems reasonable to suggest that the centripetal migrations of creative labor are not necessarily specific to post-Fordist regimes of flexible specialization or even to capitalism but have, in fact, existed under various regimes of production. In post-Fordist industrial settings mutual learning effects are no doubt an animating force behind the concentration of creative labor, but just as interesting is that many *Fordist* enterprises self-consciously sought to realize these effects as well. For example, Alfred Chandler observes that large corporations in the information industry internalized and compounded learning effects throughout the twentieth century.[41] Indeed, he contends that leading firms in the electronics and computer industries, such as AT&T and IBM, were distinguished by their ability to foster continuous paths of organizational learning. Moreover, firms that successfully manage ongoing innovation (i.e., the production of prototypes) tend to concentrate their creative workforce and to establish effective conduits for channeling information among production units and from consumers back to producers. For Chandler, learning effects may take place within a single integrated enterprise, or they may extend to a nexus of interconnected and complementary firms that support a core company. In either case, geographical clustering stimulates innovation.

Furthermore, Bordwell, Thompson, and Staiger demonstrate similar patterns in the early movie industry. Under the classical studio system, a set of creative norms emerged out of complex and extended interactions among employees within a given studio and among the local filmmaking community. The "Hollywood style" grew out of collective reflection and discussion regarding various experiments in cinematic representation. This ongoing negotiation improved the quality of studio films, enhanced the market dominance of Hollywood product, and acted as a powerful attraction to those around the world who aspired to make movies. Hollywood not only absorbed migrant actors and craftspeople; it also periodically tapped pools of renowned expertise from countries around the world, such as Russia (Sergei Eisenstein), Germany (Ernst Lubitsch), and the United Kingdom (Alfred Hitchcock). Thus, mutual learning effects prevailed in both the integrated studio era and, after 1948, in the disintegrated studio era. The industry's ability to adapt to shifting circumstances while maintaining its infrastructure for organizational learning suggests why Hollywood endures as a center of creativity and why creative labor continues to migrate to Southern California.

In general, we can conclude that cultural production is especially reliant on mutual learning effects and trajectories of creative migration and that, inevitably, particular locations emerge as centers of creativity. These principles have operated throughout history under various modes of production, but the modern era is distinctive because the centripetal logic of capitalist production has been married to the centripetal trajectories of creative migration, engendering the rise of Hollywood as an unparalleled center of media capital. Nevertheless, the significant symbolic content of media products attenuates the reach of Hollywood movies, despite the generative power of the industry. That is, the cultural distance between American filmmakers and Turkish or Indian audiences introduces the prospect that the meaningfulness and therefore the value of certain products may be determined at the moment of consumption or use. Although the centripetal logic of accumulation and of creative migration helps us identify the concentrations of media capital, the centrifugal patterns of distribution are much more complicated, especially when products rub up against counterparts in distant cultural domains, which are often served, even if minimally, by competing media capitals that are centers of creative migration in their own right.

Cities such as Cairo, Mumbai, and Hong Kong lie across significant cultural divides from their Hollywood counterpart, which helps to explain why producers in these cities have been able to sustain distinctive product lines and survive the onslaught of a much more powerful competitor. These media capitals are further supported by intervening factors that modify and complicate the spatial tendencies outlined above. Consequently, the third principle of media capital focuses on forces of sociocultural variation, demonstrating that national and local institutions have remained significant actors despite the spatial tendencies of production and distribution. Indeed, the early years of cinema were exceptional in large part because the logic of media capital unfolded relatively unimpeded by national regulation, but as the popularity of Hollywood narratives increased, many countries established cultural policies to address the growing influence of this new commodity form. Indeed, motion pictures presented governments with a unique policy challenge, since they were distributed even more widely than newspapers, magazines, and books, the circulation of which was limited to literate consumers within shared linguistic spheres. By comparison, silent-era cinema challenged linguistic, class, and national boundaries, because films circulated widely within the United States and overseas, swelling the size of audiences dramatically and fueling the growth of large-scale enterprises. According to Kristin Thompson, U.S. movie companies became dominant exporters by the mid-1910s, a trend that contributed to a further concentration of resources and talent and encouraged the refinement of film styles and production values.[42] By the 1920s, however, opinion leaders and politicians abroad grew wary of Hollywood movies, and cultural critics began to clamor for regulation. Many countries imposed import quotas and content regulations on Hollywood films, and some set up national film boards to subsidize cinema productions with national themes and talent.[43] Similar measures were considered, if not adopted, by countries around the world.

Most important, however, was state-subsidized radio broadcasting, which in most every country outside the Western Hemisphere was established as a public service system and remained so until the 1980s. Britain, which would serve as a model to others, explicitly charged the British Broadcasting Corporation with responsibility to clear a space for the circulation of British values, culture, and information.[44] Radio seemed an especially appropriate medium for intervention, since many of its characteristics helped to insulate national systems from foreign competition. Technologically, radio signals traveled only thirty to sixty miles from any given transmitter. As in Britain, one could interconnect a chain of transmitters that would blanket the countryside, but the only way for foreign competitors to reach one's home audiences was via shortwave radio, a temperamental technology that was comparatively inaccessible to the masses. Such insulation was further ensured by an international regulatory regime that allocated radio frequencies on a national basis, thereby minimizing technical as well as cultural interference among countries. Language provided another bulwark, since radio relied on aural competence in the state's official language, thereby helping to distinguish national productions that played in domestic settings from Hollywood "talkies" that played at the cinema. Finally, public service radio systems were bolstered by indigenous cultural resources to which the state laid claim. Literary and theatrical works were commonly appropriated to the new medium, as were folk tales and music. State ceremonies and eventually sporting events also filled the airwaves as the medium participated in self-conscious efforts to foster a common national culture.

Radio also promoted a shared temporality among audiences. Its predecessor, the nineteenth-century newspaper, pioneered this transformation, for it not only directed readers to stories that the editors considered significant but also encouraged them to absorb these stories at a synchronous daily pace. Hegel's reference to the morning ritual of reading the newspaper suggests the ways in which readers partook of common narratives and furthermore did so at more or less the same time.[45] Radio extended such rituals to nonliterate groups, and it expanded the horizon of synchronization, such that programming schedules began to shape daily household routines and create a national calendar of social and cultural events. Radio insinuated itself into the household, interlacing public and private spheres and situating national culture in the everyday world of its listeners.[46] Even though radio systems were founded under the guiding hand of politicians, educators, and cultural bureaucrats, over time they would open themselves up to audience participation, employing yet another distinctive cultural resource as part of their programming repertoire: the voice of the people. In each of these ways public service radio accentuated national contours of difference

in opposition to media capital's desire to operate on a smooth plane of market relations worldwide.[47] As we can see, the forces of sociocultural variation were often influenced by assertions of political will, which no doubt is one of the reasons that Hollywood film companies go to such great lengths to present themselves as apolitical institutions. By self-consciously presenting their products as "mere entertainment," they try to move them outside the realm of political deliberation, thereby destabilizing the core rationale for national cultural policies.

Although government regulation often focuses on ways to attenuate or refigure the centripetal and centrifugal tendencies of media capital, it can also act as an influential enabler by establishing institutions and policies that foster the growth of media industries. Intellectual property laws are an especially compelling example in this regard. In the United States, for example, court rulings during the 1910s provided movie studios with intellectual property rights so that they, rather than their employees, might claim protection for the films they "authored." Although copyright laws originally aimed to foster creative endeavor by *individuals*, the courts allowed movie factories to claim artistic inspiration as well. Interestingly, they further ruled that waged and salaried laborers at the major studios were neither creators nor authors but were rather "work for hire." In this way, the American legal system profoundly transformed copyright law, facilitating the industrialization of cinematic production and providing expansive legal protection for movie distributors.[48]

In addition, the U.S. courts handed down rulings during the 1920s that allowed the federal government to parcel out commercial broadcasting licenses, effectively turning a public resource—the airwaves—into a private commodity that could be owned and controlled by large corporations. Regulators then granted locally licensed stations the liberty to contract with national networks, a policy that effectively handed over large segments of the broadcast day to national programming and advertising. Rather than acting primarily as local trustees of a community resource, radio station executives soon focused most of their attention on managing the public airwaves as profit-generating enterprises. By "selling the air," in Thomas Streeter's felicitous phrase, the government created a market-driven system out of an intangible public resource, enabling a national program distribution system, stimulating the growth of national advertising, and concentrating creative resources in a handful of urban centers.[49] During the transition to television, the government again favored the very same corporations and set in place a system that was even less responsive to local markets, institutions, and audiences. By the end of the 1950s, national program production—which during the radio era had been dispersed in such cities as New York, Chicago, Cincinnati, and Nashville—became concentrated in Hollywood, churning out telefilm narratives that came to dominate larger and larger shares of each local station's broadcasting schedule.[50] Manufactured on celluloid like their theatrical counterparts, these TV series were then available for export overseas, where they infiltrated emerging television systems in such countries as Germany, Singapore, and Saudi Arabia. The U.S. government extended a helping hand to Hollywood distributors by providing dubbing services and most important by advocating a free flow doctrine in an attempt to preclude the prospect that import quotas might undermine the spatial reach of American TV shows. More recently, the U.S. government has been a powerful advocate of international copyright enforcement, hoping to enforce uniform standards worldwide that would maximize the profits of film, television, music, and computer companies, many of them significant contributors to the major American political parties.

Although market forces have been primary engines of cultural production and circulation in the modern era, the boundaries and contours of markets are subject to political interventions that enable, shape, and attenuate the dynamics of media capital. Accordingly, this volume reasserts the importance of policy, suggesting that concepts such as free flow and market forces are in fact meaningless without self-conscious state interventions to fashion a terrain for commercial operations. Markets are made, not given. And the logic of accumulation must therefore be interrogated in relation to specific and complex mixtures of sociocultural forces.

Finally, it should also be pointed out that self-conscious state policies are not the only actors that organize and exploit the forces of sociocultural variation. Media industries in Bombay, Cairo, and Hong Kong have for decades taken advantage of social and cultural differences in their production and distribution practices. Operating across significant cultural divides from Hollywood and from other powerful exporters, they have employed creative talent and cultural forms that distinctively resonate with their audiences. They have furthermore sought to fashion films and programs featuring protagonists who, in the words of audience members, "look just like us." Although these media industries commonly manufacture fantastic narratives, their heroes and stars offer audiences points of identification that are more accessible than their American counterparts. In addition, these industries have made use of social networks and insider information to secure market advantages, and they have invoked cultural and national pride in their promotional campaigns. As we shall see in the chapter discussions, forces of sociocultural variation provide opportunities for carving out market niches that are beyond the reach of Hollywood competitors.

Media capital is therefore a concept that at once acknowledges the *spatial* logics of capital, creativity, culture, and polity without privileging one among the four. Just as the logic of capital provides a fundamental structuring influence, so too do forces of sociocultural variation shape the diverse contexts in which media are made and consumed. The concept media capital encourages us to provide dynamic and historicized accounts that delineate the operations of capital and the migrations of talent and at the same time directs our attention to forces and contingencies that can engender alternative discourses, practices, and spatialities.[51] As we shift our attention to Chinese media, we will see, for example, that practices within Chinese enterprises often differ significantly from the their Western counterparts and that a cultural divide between East and West registers in the perceptions and tastes of Chinese audiences. Moreover, within the sphere of Global China itself, audiences in different locales express distinctively different attitudes toward fashion, music, and imagery. Initial fantasies of a sprawling but organically coherent Chinese culture—a "Greater China"—have faded as businesses have confronted the very difficult challenges of creating and promoting transnational products while also keeping an eye on niche markets within diverse Chinese societies around the world.[52]

My initial interest in Chinese media was sparked by the realization that they, too, are globalizing alongside and intersecting with Western media. The concept of media capital helps us to examine such developments without presuming that Hollywood acts as a singular globalizing force or that Chinese media are a singular countervailing force. Instead, media capital encourages us to consider alternative, overlapping, intersecting processes of cultural globalization, and it is in this context that careful examination of the commercial Chinese film and television industries provides a lens through which to assess the prospects of these industries and the processes of cultural globalization.[53] All of which returns our attention squarely to questions of location: Where and under what conditions have global Chinese media enterprises emerged? Where are their audiences and markets located? In what ways has the spatial configuration of these media enterprises been shaped by market forces, creative migrations, and sociocultural dynamics? And what might we expect in the future? That is, where will we find prominent creative centers, and what might we expect so far as the reach of their products?

The first two chapters provide historical background regarding the development of Chinese commercial cinema. Focusing first on the fortunes of

Shaw Brothers, in chapter 1 I show how civil war and world war disrupted the social environs of East Asia, encouraging Chinese movie companies to refigure the geography of their operations and to imagine themselves as transnational enterprises almost from the very beginning. Shaw Brothers became one of the most successful studios, relocating from Shanghai to Singapore to Hong Kong and developing a distribution and exhibition chain that has reached Chinese audiences across East Asia and around the world. By the late 1950s, Run Run Shaw would concentrate the company's production operations in Hong Kong, establishing one of the largest integrated film studios in the world. Yet by the end of the 1960s, Shaw would declare the movie business a sunset industry and turn his attention to local television, taking control of Hong Kong's first commercial broadcast service, TVB.

In chapter 2 I chronicle the unexpected revival of the film industry during the 1970s and 1980s, sparking a "new wave" cinema resolutely attentive to its local Hong Kong audiences but also dependent on overseas presales of distribution rights in order to fund its operations. Golden Harvest, the most prominent studio of the era, parlayed the success of Bruce Lee, Jackie Chan, and Michael Hui into a lucrative production and distribution empire that emphasized location shooting and partnerships with independent producers. Besides Golden Harvest, in chapter 2 I also analyze the operations of one of the leading independent production houses, Cinema City, a company that thrived on local hits such as *Aces Go Places.*[54] During the 1980s, Hong Kong emerged as one of the world's most vibrant cinemas, characterized by hybrid genres and exuberant experimentation that proved popular with local mass audiences. Yet as filmmakers concentrated their attention on local theater audiences, producing what critics now characterize as "authentic" or "golden age" Hong Kong cinema, they serendipitously created movies that proved popular with overseas audiences as well.

Chapter 3 turns our attention to Taiwan—one of the most important overseas markets for Hong Kong films during its heyday—and explains how the Chinese movie business paradoxically crumbled during a period of escalating demand. By the 1990s, presales to Taiwan provided 30 to 50 percent of the total financing for an average film, and as new media technologies proliferated, video and cable revenues magnified the attractiveness of Hong Kong movies even more, sparking feverish competition among Taiwanese distributors. Ironically, the very technologies that enhanced demand for Chinese films and extended their reach into private homes would prove to be the industry's undoing, for they triggered a period of hyperproduction, in which the quantity of films escalated while the quality plummeted. In this chapter I explain how the practices of producers and distributors failed to adapt to changing technological forces and audience tastes, leading to a period of decline and uncertainty.

As the fortunes of Chinese commercial cinema waned, Hollywood studios came to dominate in Taiwan, not so much because they crushed the local competition, but because they filled a void and exploited the promotional possibilities of a media sector that was growing rapidly due to the end of martial law in 1987. In chapter 3 I also discuss the attitudes of local audiences and argue that, although Hollywood now prevails in Taiwan, there remains a broad-ranging popular awareness of stars and entertainment products from Global China. Despite current uncertainties in the industry, demand for Chinese entertainment products remains strong, even if many them flow through pirate distribution channels. I conclude that the Chinese film industry is now passing through a process of structural adjustment and that past practices of the movie business are giving way to globalized multimedia strategies.

Most interesting perhaps is that, despite the collapse in attendance at Chinese cinemas, Hong Kong movies remained a very popular form of programming on cable and satellite TV during the 1990s. Chapters 5 through 8 chart the emergence of new local and transnational television services in Hong Kong, Singapore, and Taiwan, where political transformations, trade liberalization, media deregulation, and new technologies provided new opportunities for media enterprises. Chapter 5 details TVB's escalating international ventures, first in video retailing, then in satellite and cable TV. In part, the Hong Kong broadcaster was encouraged to look abroad because of the fragmentation of its local mass audience and the appearance of new competitors, such as Hong Kong property mogul Peter Woo, who landed the government franchise for the territory's first cable system, and the son of another mogul, Richard Li, who launched Star TV, a pan-Asian satellite platform with expansive ambitions. In this chapter I describe the complex maneuvering and intense rivalry among leading Hong Kong capitalists, each with an eye on the emerging Global China media market.

In Taiwan, where the government had long taken a proprietary interest in television, the end of martial law in the late 1980s sparked a wave of experimentation with cable TV, which in the following decade would flourish into one of the most robust cable markets in the world. In chapter 6 I describe the shift from a government-controlled oligopoly to a competitive market system, which forced the dominant terrestrial television stations to forge new coproduction partnerships with, surprisingly, TV stations in mainland China. At the very moment when the governments of Taiwan and the People's Republic of China were locked in a heated political standoff, television executives found ways to cooperate on the production of historical dramas that proved popular with audiences throughout Global China. In chapter 7 I follow up on these developments with profiles of important new cable competitors—TVBS, FTV, and SET—explaining how each entered the Taiwan market by focusing on a particular audience niche but was in time forced to pursue a more globalized perspective on future growth.

In chapter 8 our attention shifts to Singapore, where the government likewise had a direct and controlling interest in television. During the 1990s, however, new pressures emerged when the island's economy shifted from manufacturing and shipping to communication and service industries. Investing heavily in transoceanic cable and satellite technology, government planners tried to refashion the Lion City as an important node in the global communication grid. In order to do so, Singapore needed to deemphasize its reputation for censorship and government propaganda by encouraging privatization of the media industries and liberalization of media content. Accordingly, the government's broadcasting operations were transformed into MediaCorp, a multimedia firm that could achieve profitability only by globalizing its operations. As with Hong Kong and Taiwan, changing political circumstances in Singapore along with new technologies and trade liberalization stimulated a transformation of sociocultural forces and an amplification of the logic of accumulation. Whereas Singaporean television initially emerged in the 1960s as a self-conscious assertion of political will, it increasingly became subject to market forces that encouraged executives and producers to think transnationally and imagine the prospects of a Global Chinese audience.

Of course, Chinese television enterprises were changing their perspectives in part because foreign media conglomerates were showing increasing interest in Asia, especially as a result of political transformations in the PRC. In chapters 9 through 12 I detail the growing engagement between local media and global institutions in the realms of satellite, cable, Internet, and cinema. Although Western executives had been following developments in Asia closely since the 1980s, things took a dramatic turn in 1994, when Rupert Murdoch bought Star TV from Hong Kong tycoon Richard Li for almost $1 billion. Chapter 9 provides a comprehensive account of Murdoch's mercurial fortunes in the region, showing how his pan-Asian aspirations faltered, leaving him with a collection of niche TV channels rather than the continental broadcasting juggernaut he thought he was buying. Like others, Murdoch originally imagined satellite technologies as transcending frontiers and unleashing the centrifugal power of his media empire. Instead, he found himself mired in infrastructural, regulatory, competitive, and programming issues in diverse markets throughout the region. Paying particular attention to Star TV's development in the PRC, in chapter 9 I show how forces of sociocultural variation on the ground reshaped the distribution and production strategies of a major Western media conglomerate with global aspirations. Murdoch's experience was not unique, however, as chapter 10 makes clear. HBO, MTV, and ESPN all found that their strategies for expansion into Asia had to be dramatically refigured as they learned to balance panregional efficiencies with distinctive factors at play in the various national and local markets throughout Asia.

Richard Li, the founder of Star TV, would have to learn these lessons yet a second time, when he returned to the media scene in the late 1990s with a new transnational broadband venture known as Pacific Century Cyberworks. As I show in chapter 11, PCCW burst into the headlines in 1999, capturing the imagination of investors and the popular press much as Star TV had done only eight years earlier. Like Star, the venture was long on ambition and self-promotion and short on crucial infrastructure and compelling content. After briskly rising to a total worth of more than $18 billion—eclipsing the value of Amazon and Yahoo at the time—PCCW sank like a rock in the global dotcom meltdown of 2001. Just as important, however, the collapse of Li's company pointed to enduring challenges in the realm of content creation, issues that continue to trouble Chinese media enterprises today.

In chapter 12 I therefore return to an examination of the commercial movie industry, a core content creator and in its heyday the foundation of Chinese audiovisual entertainment. In the early 2000s, Golden Harvest tactically withdrew from filmmaking, concentrating instead on extending its cinema circuit. China Star has remained an active producer but likewise has sought to bolster its infrastructure by establishing an expansive video distribution network. Most successful, however, is Media Asia, a producer of high-profile blockbusters that are qualitatively competitive with Hollywood. Now a division of an expanding multimedia conglomerate, Media Asia provides foundational content that is leveraged through various divisions of the eSun corporation. Though still not fully realized, eSun's strategy is to create distinctive products for a broad array of markets and to establish a brand identity built around quality content that moves fluidly across media platforms and national borders. Although some movie moguls imagined a pan-Chinese cinema as early as the 1930s, the emergence of conglomerates such as eSun heralds a new era in media strategies and practices, one that specifically imagines the global Chinese media market as lucrative, expansive, and multidimensional.

Finally, in the conclusion, I summarize my findings and refocus attention on questions of cultural geography and public policy. Chinese media present an especially rich case study because their spatial configurations have varied dramatically over the past century. Now, in an era increasingly characterized by globalizing forces and flows, it is worthwhile to reflect on the prospects of Chinese screen industries as they look to the future and to consider which strategies and policy interventions might help to augment their current capacities. If indeed the twenty-first century is to be the Chinese century, then one must wonder which centers of media activity will play a prominent role and to what extent they will truly integrate and extend their operations transnationally. Those who succeed are destined to shape not only the future of Global China but other futures as well.

1 The Pan-Chinese Studio System and Capitalist Paternalism

In 1966, Run Run Shaw reached the peak of his movie career as the head of the biggest and most influential motion picture studio in Asia. A reporter for *Life* magazine, inquiring about the secret of Shaw's success, turned for explanation to the movie mogul's daily regimen, which began at 6 A.M. with a spare breakfast of noodles and tea followed by qigong exercises at his expansive ocean-front mansion situated in the rugged headlands above Clearwater Bay in Hong Kong. Invigorated, Shaw would then set to work reviewing movie scripts before leaving at eight o'clock for a five-minute ride in one of his prized Rolls Royces, heading down a winding road to the sprawling Shaw Brothers studio. After an hour spent touring the production sets, the boss would then retire to his second-floor corner office in Shaw House, perched on a rise above the main gate to Movie Town. There he would continue reading scripts, reviewing rushes from the previous day, and viewing recent releases from competitors. Just before lunch Shaw often met with Raymond Chow, head of production, to go over detailed recommendations for writers and directors, paying close attention to each of the forty or so films annually produced by the studio. A shrewd businessman who started his career managing a chain of movie theaters, Shaw also paid careful attention to every aspect of the creative process, and many believed that the studio's success was in large part due to his acute awareness of audience tastes and preferences. This was especially apparent whenever competing movie studios, and later television stations, challenged Shaw's dominant market position. In each instance, the boss provided hands-on leadership, guiding the work of production and programming staffs.

Yet if Shaw's mornings were devoted to the creative side of the business, his afternoons and evenings were set aside for the far-flung distribution and exhibition operations of Shaw Brothers' empire. Over the course of his ca-