

01- 10

2001. 11

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가

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•

가 , HDTV, ,

가 TV가 , TV

가

6

1).

< -1> 가

, 2000

2000 2001 10

< -1> 6

가

1)

가 가 ,  
 가 가 .

< -1>

(1)	- : , , , - : , ( ), - ( ) · , , TV · ( ) ( : OPEN TV, MHEG )
(2)	- : , TV · ,가 , (10 ) - ( , TV, ) , (PP), ( ) - ( , , ) -
(3)	- ( , TV, ), , · · ( , , , ) · ,
(4)	- , , - -

가 6 가

4

•

1.

1)

TV 1996 (Telecommunication Act 1996) 2  
 FCC가  
 ( ,  
 ),  
 1996 FCC 가  
 FCC TV 1996 201  
 1987 7 NHK  
 `ATV  
 . FCC  
 , TV 가 30% 10  
 4 1999 5 11  
 . 11 30 1999 11  
 , 2002 5 1 , 2003  
 5 1 TV . 2006 85%

FCC  
 NAB(National Association of Broadcasting) 10  
 22 1998 11 1 TV  
 FCC  
 2001 5 195  
 2) 65 TV가 68.5%  
 가

< - 1 >

1996. 2. 8.	'Telecommunication Act of 1996'
1996.11.27.	, DTV (Technical Standards Agreement) FCC
1996.12.24.	FCC, DTV
1997, 4. 3.	FCC, Fifth Report and Order, Sixth Report and Order
1998.11. 1.	10 22 11 1 TV
1999. 5. 1.	10 가 ( 가 30%) , 11 1 30 가 TV
2002. 5. 1.	TV
2006.12.31.	

2) 가

TV 가 FCC

2) Informa Media Group, TBI yearbook 2001, , “ , 2001, 6.

.3) FCC

HDTV

가

, 가 가 , FCC가

가 , 가 3

, FCC

.4)

가 TV

Sixth Report and Order

가

90

FCC

TV

.5)

TV

가

6MHz

FCC

가

FCC

4

가

TV

TV

가

15%

TV

, TV 가

15%

TV

가

TV

가

3) New media Markets, 2001. 1. 12

4) Paul Budde Communication Pty Ltd., "News-Australia-Broadcasting (Cable, Pay, Digital TV, Radio)", 2001.5,

5) FCC TV 1997 4 3 Fifth Report and Order Sixth Report and Order . FCC 1996 TV 가

TV (2002 5 1 )

.6)

< -2> DTV

1998		13,176	
1999		121,000	
2000	1/4	68,184	
		425,000	

: , , “ ”, , 2000. 8. 16.

FCC , 2001 4 25 1,440 가  
 , 1,091 가 가 . 192  
 . , 10 40  
 35 가 DTV , 4  
 38 . 11 30 79  
 가 , 58 DTV , 18 67

.7)

3)

(1)

FCC 2001 1 19 , 8-VSB DTV  
 . FCC 8-VSB  
 (COFDM) 가 . ,

6) <http://www.aba.gov.au/what/program/cont-reg.htm>

7) [http://www.dtg.org.uk/news/uknews/bbc\\_survey.htm](http://www.dtg.org.uk/news/uknews/bbc_survey.htm), . , " , 2001, 6. .

8

가 가 가 .

(2)

FCC TV

TV TV  
FCC TV 가

,

TV

가

가

TV(HDTV)

2,500

1,000

가

. FCC

TV

가

가

가

가

200 300

FCC

. CEA(Consumer Electronics Association

가

)

FCC

(3)

TV

FCC

TV

FCC

,

TV

TV

TV

FCC

TV

가

. FCC

가

가

, FCC

(4) DTV Labeling

FCC 2000 9 14 DTV

TV

DTV

. FCC

3가

) "Digital Cable Ready 1"

, , TV  
TV .8)

TV

가

) "Digital Cable Ready 2"

Digital Cable Ready 1

가

가

1394

가 TV

Digital Cable Ready 2

STB

가 가

) "Digital Cable Ready 3"

Digital Cable Ready 1

가

가 TV

.9)

8) [http://www.dtg.org.uk/news/uknews/sky\\_5mil.htm](http://www.dtg.org.uk/news/uknews/sky_5mil.htm)

9) <http://www.dtg.org.uk/news/uknews/-dignhood.htm>

(5) ( )

FCC , 가

( ) 2  
가

가

TV  
, TV 가 Must Carry

CEA(consumer electronics association: 가 )  
, 가 200~ 600 가 가

가  
가 가 가

가  
, 2020 가 가 ,  
2015 가 .  
2010 가 가 .  
가 , 가  
NAB CEA NAB2001

DTV Store ,

4) , ‘ ’

(1)  
2001 3 3  
District of Columbia)

(U. S. Court of Appeals for  
가 30%

FCC

가

FCC

가

TV 가

35%

FCC

TV가

TV

TV

"

FOX CBS, NBC

FCC가

35%

가

35%

(2) 4

FCC

4

(ABC, CBS, NBC, Fox)

(WB, UPN)

.10)

. FCC

가

(Michael Powell) FCC

FCC가

, 1996 71%

6

2000

58%

10) " , " ,

, 2001, 4. 30.

12

84% 가 가  
.11)

1946 가  
55 가  
1996 가 , 2000

(3)  
FCC 2000 11  
2

, 99 11 「Satellite Home Viewer Acts」  
TV  
가 TV  
.12)

2002 1 가  
가  
가 가  
Grade B  
FCC  
TV TV

---

11)  
12) , “

”, 2001, 2, p.70

.13)

(4) FCC Michael Powell  
 2000 FCC  
 (Michael Powell)  
 . FCC (The Progress &  
 Freedom Foundation)

.14)

(Innovation)  
 가  
 가  
 (antitrust policy) 가  
 가 가  
 가 (Innovation) 가  
 가

가

가  
 Schumpeterian<sup>15)</sup>

---

13) , “ . ”,  
 , 2001.8. p.46.  
 14) Michael K. Powell, The Great Digital Broadband Migration, 2000. 12.  
 , “ FCC ”,  
 , 2000, 12. 16  
 15) FCC (schumpeter) ‘ , ’  
 , 가 innovation  
 , ,

가

가

가

가

가

가

가

FCC

(動態的)

(Powell)

FCC

(Powell)

가 , 가  
가 , 가  
(Powell)  
FCC가 1996

가

, 가

5)

TV

(1)

2000 1 , NBC ABC '(National Association for the Advancement of Colored People: NAACP)'  
. NAACP  
가

. NAACP NBC

.<sup>16)</sup>

가

---

16) “美, ”, , 2000. 5

16

- 가  
 - 2000-2001  
 -  
 - 18 1,000

NBC NBC 가  
 ,  
 ABC ,  
 가 ,  
 . CBS FOX  
 . CBS ,  
 , FOX .  
 . CBS 2000  
 4 ,  
 (Josie Thomas) . , NBC 가  
 ,17)

(2)  
 CBS 2000 ' (City of Angels)  
 가  
 , , ,  
 ( )  
 85% , 70% . ' ,  
 CBS ' (Touched by an Angel)  
 . NBC, ABC, FOX  
 ,18)

(3)

---

17) , p.48.

18) New York Times, 2000 1 8 , 2 4

NAACP

가

80

'Cosby Show' 'Jamie Fox Show'

가가

가

'ER'

'ER' . CBS가

'American

Family'

가

. ABC 'Wife

and Kids'

. NBC

'The Thing about Family', 'DAG', 'In Living Color'

'Homicide' .19)

(4)

가

.20)

(5)

19) Broadcasting & Cable, 2000 1. 10

20) '美', , p.50

. FCC 2000 1 ‘  
(Equal Employment Opportunity Rules: EEO)

.21)

5

EEO FCC , FCC  
EEO .

(6)

FCC 99 11 25

.22)

8 1,200 ( )  
. 가

(Second Audio Programming: SAP)

가

가

가 가 , 가

59% SAP 가 .23)

가 TV

21) Broadcasting & Cable, 2000 4 24

22) “美 FCC, ”,  
2000,1, pp.40-41.

23) New York Times, 1999, 11, 23

가 , 18 25  
( 4 가 ) 4

가

10  
PBS WGBH 80 'Masterpiece Theater'  
'Nature' 1,600  
FCC ,  
1% ,24) FCC  
96

6)

Analog  
(SD) 4 6 가 가  
( ) , 1 2 HDTV 가 , 5.1CH  
가 가 ( / ) , EPG, Shopping, Banking, G  
가  
Downstream ,  
Up/Down Stream ,

24) "美 FCC, ", , p.41.

가 .

(1)

가 가

( )가

(SettopBox)가 . QAM  
Cable TV, QPSK , 8-VSB, C-OFDM

(MPEG-2 ) Cable TV

Cable TV

ADSL

MPEG-2

CASS , FTA(Free To Air) ,  
가 가

.25)

(2)

, , 가 가 . TV  
PC 가 , TV  
가 . TV PC (Operating Syste  
(Browser), (plug-in), (Middleware) 가

---

25) . , “ (Settop Box) , ,  
2001, 2., pp.8- 11

TV VOD가 , 1994  
 VOD 가  
 VOD  
 가 TV 가  
 EPG(Electronic Program Guide),  
 가 가 ,  
 가 가 .

(3)  
 EPG(Electronic Program Guide) Interactive Ca  
 가 , Open TV  
 Open TV Interactive TV 가 . 19  
 Open TV  
 Interactive 1 TV  
 . Open TV TPS(Television Par Satellite), B  
 British Interactive Broadcasting, Perfect TV, Telia,  
 Tele Denm kabel . Open TV D  
 Network Echostar Communications .  
 TV Canal+ 가 가 . Open TV  
 DVB MPEG-2 . Interactive TV가  
 IP  
 , Open TV IP- Interactive TV  
 . Open TV DVB .

(4)

Open Cable DVB-C가

< -3 > 가 TV

	가
ATSC	, , ,
DVB	, ,
ISDB	

- ATSC : Advanced Television System Committee(8VSB )
- DVB : Digital Video Broadcasting Group(CO-DM )
- ISDB : Integrated Services Digital Broadcasting(BT-OFDM )

< -4 > 가 TV

	가
DVS	, , ,
DAVIC	, , , , , ,

- DVS : Digital Video Subcommittee,  
Society of Cable Telecommunications Engineers.  
(QAM Modulation )
- DAVIC : Digital Audio-Visual Council.  
: "美 TV ", , 2000, 9, p.41.

가 , 가 .

MPEG-2 ,

DVB-C MPEG-2 Audio , Opencable

AC-3 . (Interactive)

가 .26)

26) " , , 2001, 5.

1996 Security Module( POD Moudle :  
 Point Of Deployment) 가  
 1998 Navigation  
 Device Rule CableLabs OpenCable

, 가 (Retail)  
 .27)

(5) TV  
 2000 TV 가 .  
 , ,  
 .

가 8-VSB(DTV )가 300 98 12 'FCC  
 COFDM 8-VSB 가 ,  
 , FCC 99 2 , ' TV FCC 8-VSB

, 99 6 NBC ABC가 8-VSB  
 . NBC ABC  
 8-VSB  
 , , ( ) TV ,  
 , / 8-VSB .28)

---

27) , p.45.  
 28)

TV COFDM(Coded

NBC GE(General Electronics) 가

.29)

7)

가

가

250 DTV

TV

TV

IDC(International

Data Corp.)

TV가

가

,<sup>30)</sup> Jupiter Media Metrix

TV가 5

53%

2005

TV

가 4,600

.<sup>31)</sup> Forrester Research

Orthogonal Frequency Division Multiflex)

8-VSB (8-Level Vestigial Sided-band)

가

가

. COFDM

8-VSB

8-VSB

COFDM

FCC가

가

(80 )

8-VSB

8-VSB 가

pp.71-71.

29) , pp.70-73.

30) IDC, "NetTV Market Forecast and Analysis, 1999-2004",

[http://www.idc.com/Store/content/store\\_free.htm](http://www.idc.com/Store/content/store_free.htm)

31)<http://www.jmm.com/xp/jmm/services/mm/globalDigitalMediaAudienceR>

2003 TV 가 가 ,  
(32)

2.

1)

TV 가 TV TV MVPD  
(Multichannel Video Programming Distribution)

(300 ) 가 가 가  
1999 가 가 가 , 2001  
3 1600 가 가 가 2005 3 9

atings.xml  
32)http://www.forrester.com/ER/Search/Results/1,1326,0,00.html

< -5> TV

		<ul style="list-style-type: none"> <li>· 3 (ABC, NBC, CBS)</li> <li>· (FOX, UPN, WBN)</li> </ul>
		<ul style="list-style-type: none"> <li>· PBS(350 )</li> </ul>
(Multichannel Video Programming Distribution: MVPD)		<ul style="list-style-type: none"> <li>· 가 (ex. ESPN, CNN)</li> <li>· 가 Pay TV(ex. HBO)</li> <li>· Pay-per-View (ex. request TV)</li> </ul>
	(DBS)	<ul style="list-style-type: none"> <li>· Direct TV</li> <li>· EchoStar</li> </ul>
	MVPD	<ul style="list-style-type: none"> <li>· HSD(Home Satellite Dishes): Direc TV EchoStar 가 가 가</li> <li>· SMATV(Satellite Master Antenna Television): 가</li> <li>· OVS(Open Video System)</li> </ul>

• , ABC, CBS, NBC  
 PBS  
 가 , , 가  
 가 Pay TV, Pay-per-View  
 TV  
 , 1994 TV가  
 . < -6>

< -6 >

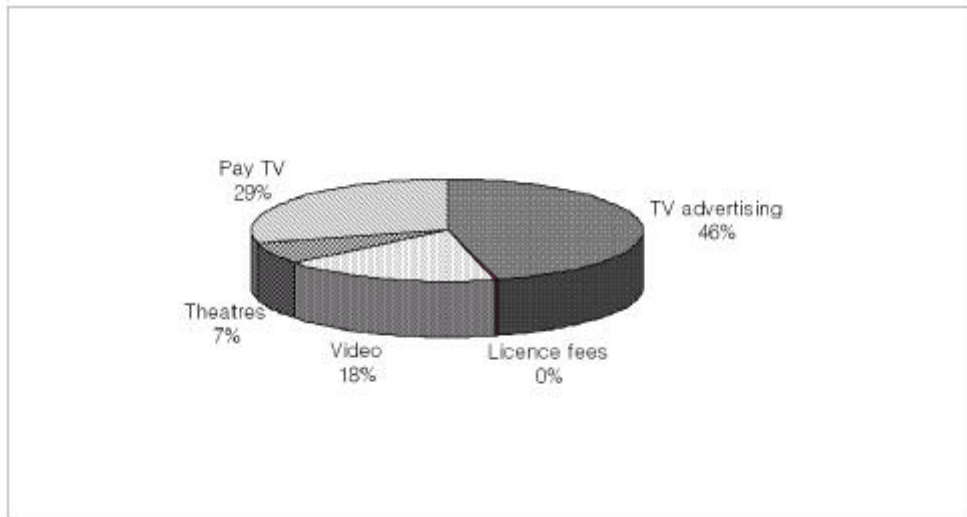
( : 가 )

		1995	1996	1997	1998	1999
가		98.0	98.7	99.7	101.6	102.5
TV 가		95.9	96.9	98.0	98.1	100.0
	가 가	62.1	64.0	64.9	66.1	67.3
	Pay-TV 가 가	46.1	47.7	48.0	47.6	47.8
	PPV 가 가	23.7	27.1	29.6	32.2	35.5
VCR 가		82.4	86.2	87.0	95.3	85.8
가 가		2.6	6.6	8.4	8.2	11.4

: Paul Kagan and Screen Digest, IDATE 2001, p.38

2)

,  
 (ABC, NBC, CBS) FOX, UPN, WBN  
 45.8%  
 MVPD  
 Video, Theatres가 53.8%  
 ( - 1)



: IDATE 2001, p.25.

[ - 1]

(1999)

< -7>

( : \$ million)

	1996	1997	1998	1999	2000(e)	Change 2000/ 1999
TV advertising	42,484	44,519	46,985	50,440	55,250	9,5%
Licence fees	315	370	444	422	434	2,8%
TV	26,228	28,740	30,337	32,176	33,896	5,3%
Video	13,513	15,900	17,660	19,760	21,341	8,0%
Cinema admissions	5,912	6,366	6,877	7,220	7,693	6,5%
Tatal	88,452	95,895	102,243	110,018	118,614	7,8%

(e)

IDATE 2001, p.28

( -7) , 2000  
 7.8% 가  
 ( , Pay TV, Pay-per-View)  
 4-5 가 ,  
 TV 550 가  
 가 TV 가

3)

< -8>  
 54.9%  
 TV TV  
 65.9% , Video 65.4% 55.9%

< -8>

( : \$ million)

	TV advertising	Licence fees		Video	Theatres	Total
1999	50,440.0	422.0	32,176	19,760	7,220.0	110,018.0
	89,199.0	19,490.8	48,615.0	30,024.6	13,103.3	200,432.8
	56.5%	2.1%	65.9%	65.4%	55.9%	54.9%

: IDATE 2001, p.22.

30

4)

(1)

NBC, ABC, CBS, Fox 4 가  
 92% .( 1999 4 )  
 4 (WB, Pax  
 UPN)

< -9>

( : \$ million)

	1999	1999	1998	99/98
NBC	4 666.0	31.1%	4 420.0	5.4%
ABC	3 780.0	25.3%	3 410.0	10.9%
CBS	3 230.0	21.6%	3 220.0	0.01%
Fox	2 270.0	15.2%	1 890.0	19.9%
WB	523.7	3.5%	335.6	56.0%
Pax	256.9	1.7%	77.4	231.9%
UPN	241.7	1.6%	166.8	43.1%
Total	14 962.3	100.0%	13 519.8	10.7%

: Competitive Media Reporting  
 IDATE 2001, p.49.

TV

가

, NBC  
 1995 40% .  
 . NBC가 GE , CBS Viacom  
 . Fox 99%

, Time Warner WB가 5%, Paramount UPN 4%  
 . 4 (CBS, NBC, ABC, Fox)가 .33)  
 4 TV 2000 ,  
 . NBC가 7 7,000 , ABC 5 2 , CBS 2  
 , Fox 4 7 . ( )  
 , ABC 'Who wants to be Millionaire', CBS 'Survivor'  
 가 .34)

< - 10 > 4 TV 2000

	(Revenue) (\$ million)	'99	(profit) (\$ million)	'99
ABC(Disney)	4,140	33%	522	NM
CBS(Viacom)	3,480	7%	200	316%
Fox	1,751	NC	47	NM
NBC(GE)	4,775	19%	770	12%

\* NC = No change; NM = not meaningful  
 : Broadcasting & Cable, 2001, 5, 28, .

4 (CBS, NBC, ABC, Fox

( - 11 )

33) IDATE, 2001, pp.48-49

34) "Big Four in the black", TV Instite News Release, 2001, 5. 28  
<http://www.tvinsite.com/broadcastingcable/index.asp?>

< - 11> 1998/ 1999

98/ 99		(%)	(%)
1	CBS	9.0	15.0%
2	NBC	8.9	15.0%
3	ABC	8.1	13.0%
4	FOX	7.0	11.0%
5	WB	n/ a	n/ a
6	UPN	n/ a	n/ a

: Institut Multi-Medias, IDATE, 2001, p.49.

(2) TV

TV 2001 6 9 가 68% 가  
 ,<sup>35)</sup> TV  
 가 가  
 TV 1999 108  
 , 2000 65% 750MHz  
 2003 95%  
 가 2003 93%가  
 (two-way) TV (NCTA)  
 160 가 가  
 . < - 12> TV

35) < > IDATE가 1999 6 7  
 가 가 63% , 2001 7  
 NCTA( TV )가 .

< - 12> TV 1)  
(2001 7 )

가	102,184,810
가 가	69,532,810
가 TV 가	68.0%
가	97,700,000
	96.7%
가 가 / 가	69.9%
가 가	48,300,000
	\$ 42,110,000,000

[http://www.ncta.com/industry\\_overview/indStats.cfm?statID=17](http://www.ncta.com/industry_overview/indStats.cfm?statID=17)

TV (NCTA)가 10 TV가  
< - 13> .

< - 13> 가 (1989-2000)

	Basic Revenue	Pay Revenue	Total Revenue
1989	\$ 8,671	\$4,663	\$15,378
1990	\$10,174	\$4,882	\$17,582
1991	\$11,418	\$4,968	\$19,426
1992	\$12,433	\$5,108	\$21,079
1993	\$13,528	\$4,810	\$22,843
1994	\$15,170	\$4,394	\$23,134
1995	\$16,860	\$4,607	\$25,421
1996	\$18,395	\$4,757	\$27,706
1997	\$20,405	\$4,823	\$30,493
1998	\$21,830	\$4,857	\$33,503
1999	\$23,146	\$4,930	\$36,919
2000	\$24,445	\$4,949	\$40,855

: Paul Kagan Associates. Cable TV Financial Databook 2001

5 가 가  
 70% , Time Warner AT&T Broadband  
 가 42% 가  
 가 .

< - 14 > 가 10  
 (2000 12 )

		가 가	가 (%)
1	AT&T Broadband	16,090,000	23.8%
2	Time Warner Cable	12,751,000	19.4%
3	Comcast Cable Communication	7,606,800	11.3%
4	Charter Communication, Inc.	6,350,900	9.4%
5	Cox Communication	6,193,300	9.1%
6	Adelphia Communication	5,292,000	7.7%
7	Cablevision Systems	2,830,800	4.1%
8	Insight Communication	919,300	1.3%
9	Mediacom LLC	779,000	1.1%
10	CableOne	734,900	1.0%

\*가 TV Media Central LLC. NCTA Paul Kagan Associates  
 \* 1999 가 6 7  
 : [http://www.ncta.com/industry\\_overview](http://www.ncta.com/industry_overview)

(MVPD: multichannel video prog distributor)  
 TV 2  
 MVPD TV가 80%

가 TV(Direc  
 TV) (EchoStar)  
 FCC TV  
 , 1999  
 11 (SHVIA: Satellite Home Viewer Improvement  
 1999)  
 , TV  
 . TV ABC, CBS, NBC, Fox, PB  
 41 \$5,99  
 34 TV  
 가  
 TV  
 TV 1994 6  
 . TV 1 NBL(National Baseball  
 League) NFL(National Football League)  
 가 ,  
 .36)  
 TV , 1999 USSB(Unite States Satellite  
 Broadcasting) 1 6 USSB  
 HBO, Showtime , TV가  
 USSB .37)  
 1999 1 , TV 가 USSB  
 , TV  
 가 . TCL(37%),  
 (31%), Comcast and Cox 가  
 .38) TV 1999 USSB

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36) IDATE, Market and Structure, 2001, p.59  
 37) , “ ”, , 2000 , p.72  
 38) IDATE, Market and Structure, 2001, pp.59-60

PrimeStar 660 가 TV  
 74% 가 , 350 .  
 988 가 (2001 3 )  
 130 가 (27 ) , 2000 1998  
 TV TV ,39)  
 TV  
 가 370  
 Dish Network 500 TV  
 572 가 (2001 3 ) .( TV가  
 )

< - 15> 가 가 ( : 가 )

	C-band	Direc TV	EchoStar	
2001/ 3	1,095	9,884	5,610	16,589
가 가	6.6%	60%	33.8%	-

\* DBS(Direct Broadcast Satellite) HSD(Home Satellite Dishes)  
 . C-Band 가 HSD .  
 Direct TV EchoStar DBS .  
 : SkyREPORT.com(http://www.skyreport.com)

5)

(1)

가.

39) , “ - TV ,  
 ”, 21, 2001, 8, p.63.

ABC

ABC 1998 11 "The Wonderful World of Disney" (720p  
 , 1999 NFL 2000

CBS

CBS 1998 11 18 HDTV "Chicago Hope"  
 , CBS 12~ 15  
 .40) CBS ,  
 가 , ,  
 "CBS  
 Sunday Night Movie" "CBS Wednesday Night Movie"  
 가 HDTV  
 , 가 CBS 2001 'Super  
 Bowl' HDTV .41)

NBC

NBC 1999 4 26 'The Tonight Show with Jay  
 Leno' . 2000 2 NBA  
 NBA.com 'NBA' . NBC  
 21 가  
 TV 가 1999 4  
 SDTV " DTV  
 (Enhanced DTV Programing)" .42)

40) Glen Diskson, "HDTV Programming Gains Momentum-More Shows to  
 Come Through 2000",  
 <<http://www.dtvweb.org/programming/programming.html>>  
 41) [http://www.cbs.com/info/user\\_services/pol\\_advertise.shtml](http://www.cbs.com/info/user_services/pol_advertise.shtml)  
 42) 'Public Interest for DTV', Television Digest, 2000, 4

FOX

FOX 480p SDTV FOX  
480p , 15  
.43)

PBS

PBS 1998 1 'Dale Chihuly' s Glassblowing Tour'  
, 'Digital TV: A Cringely Crash Format', 'Ken Bu  
Frank Lloyd Wright', 'Jessye Norman-Home for the Holidays'

PBS 가 KCTS-DT , 41 2 ~ 11  
, 12 , KCTS-DT/Plus  
7 2 , 7  
. KCTS-Learns Annenberg-CPB Project  
, 7 2 , 7  
.44) PBS Kids Channel

1996 9 6 PBS

HD

, HD HD 가

<[http://www.findarticles.com/cf\\_dls/m3169/16\\_40/61545833/p1/](http://www.findarticles.com/cf_dls/m3169/16_40/61545833/p1/)>

43) Paul Kagan, State of Digital TV, Paul Kagan Associates, Inc. 1999, p.147.

44) <http://www.learner.org/channel/about.html>

PBS . PBS 1998 99 가 ‘ ’ ,  
 . HD .45)

. 4  
 , CBS 99 가 HD  
 , 가 HD  
 . TV  
 NBC , 99 4 , ‘ ’  
 HD . Fox HD 가 ,  
 HD HD  
 가 가  
 가 , CBS, Panasonic ABC, NBC 가  
 가 .46)

24 HD , HD  
 PBS 3 .  
 HD  
 ,  
 , 6MHz  
 HD 1 4  
 .  
 PBS  
 ,  
 ,  
 ‘Kids ’ ‘U ’ .47)

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45) “ : ”, , 2000, 5. pp.66-67  
 46) , p.67  
 47) “ ”, 2000, 5, pp.66-68.

40

3 4

가

'Frank Loyd Light'

가 가

. 1998

PC

(2)

가.

Discovery channel

가

가

가

가

가

가

. < -16>

< -16>

	가	
(Discovery Science)	1	
(Discovery Kids)	7	2- 14
(Discovery Wings)	550	
(Discovery Civilization)	550	
가 (Discovery Home & Leisure)	550	, ,
(Discovery en Espanol)	1	

: Broadcasting & Cable, 2000, 3, 19.

MTV  
 MTV  
 . MTV  
 . 1999 3  
 Nickelodeon GAS(Games and  
 Sports for Kids) MTV  
 MTV ,  
 가 가 ,48)  
 MTV . MTV  
 MTV2 1998 , 3 가  
 .  
 MTV-S, 80 90  
 MTV-X, VH1 Classic VH1 Soul  
 . 1999 2 Noggin ,  
 가 , 2 가 .  
 Nick Too Nickelodeon  
 가 .  
 MTV ,  
 . Noggin  
 가 MTV2 .  
 MTV ,  
 가 .  
 , MTV  
 ,  
 . MTV  
 .

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48) “美 TV ”, , 2001, 5, p.30

HBO  
HBO , 2001 5  
HBO/Max Pak  
. HBO Cinemax  
, Starz 12 Super Pak .  
HBO HBO/Max Pak 7 HBO 8 Cinemax ,  
WMax, @Max, OuterMax, 5StarMax  
. HBO  
, HBO  
(Premium) 가 가 가  
.49)  
7 HBO HBO Latino가 , HBO  
가  
. HBO Plus HBO  
, Signature , HBO Family  
. HBO Comedy HBO Zone 18 3  
, HBO  
, 가 HBO . Cinemax  
5StarMax , OuterMax  
(Sci-Fi), (horror),  
HBO ,  
가 HBO 가 , HBO가  
가 가  
. TV  
TV

---

49) , p.31

가 TV 가 가  
 1999 , 8 MSO(Multiple Systems Operator)  
 TV 가 가 230 ,  
 280 가  
 가 가 .50)

< - 17> TV 가 가  
 ( : 가 )

	1999		2000	
	가	가	가	가
AT&T	11.400	1.787(16%)	16.000	2.868(18%)
Time Warner	12.600	0.430( 3%)	12.800	1.700(13%)
Comcast	7.550	0.500( 7%)	7.610	0.970(13%)
Chater	6.193	0.155( 3%)	6.351	1.069(17%)
Cox	6.100	0.350( 6%)	6.200	0.840(14%)
Adelphia	1.637	0.035( 3%)	5.191	0.870(17%)
Cablevision	2.775	0.000( 0%)	2.831	0.000( 0%)
Insight	0.930	0.047( 5%)	0.919	0.103(11%)
	17.320	0.690( 4%)	9.760	0.290( 3%)
	66.500	4.020( 6%)	67.660	8.710(13%)

: 가 (basic) 가 , 가 가  
 가 가  
 : Forrester Research(2001)

< - 17> , TV 가 가 1999 4 가  
 2000 470 가 870 가 . 1999  
 TV 가 6% 가 가 , 2000  
 가 13% . TV

50) Forreter Research, "Cable's On-Demand Salvation",  
<http://www.forrester.com/ER/Research/Report/Interview/0,1338,12204,FF.html>(2001,4)

44

가

TV 가 , TV 가 가가 가  
 TV 가 가  
 가 TV 가

< - 18 > TV가 (2001-2004)  
 ( : 가 )

	2001	2002	2003	2004	
Screen Digest	18,042	29,966	43,542	57,613	8 MSO 가
Strategies Group	15,300	21,300	27,700	35,000	2005 (4,240 가 )

: Screen Digest(2000 3 )

< - 18 > TV 가 ,  
 32%(Stratageis Group)  
 76%(Screen Digest) 가 가

TV  
 4 5 가

2001 ,

350 400 (set-top box)

(MSO: Multiple System Operator) 가

6,700 가 20-25% 1,400 1,700

가 가 ,  
 30% 50% .51)  
 가  
 , 가  
 (Cablevision  
 Systems)  
 , MSO  
 (Charter Communication) 2000  
 가 16% 7 가 .52)  
 , HBO ,  
 1 ‘ (The  
 Sopranos)’  
 (compression technology) AT&T Broadband  
 , AOL 1999 4%  
 가 2000 14% ,  
 (Cablevision Systems) 3 가 3 가  
 150 가 (pay-per-view)  
 .53)

(3)

1994 6 ,  
 (HSD, Home Satellite Dishes) , DBS(Direct Broadcast Satellit

51) “美 TV ”, , 2001, 5, p.29

52) pp.30-31.

53) “AOL Time Warner; Analysts vs. Investor”, Business Week, 2001. 1.8.

46

TV

가

가. 2

TV

TV 1999 37 8500 , 90%

TV가 8% . 1994 1999

.54)

TV

IRD(Integrated Receiver/Decoder)

가

, RCA 가

.55)

EchoStar

(Charles Ergen)

MCI-WorldCom 가

TV 가 TV

TV

, 'Dish PVR' 가 TV(Wink TV

54) , “ , ”, 21, 2001, 8, p.63

55) [http://www.prime-view.com/direc\\_pc.htm](http://www.prime-view.com/direc_pc.htm)



(A La Carte) . 가  
 , 가 가  
 가 105 . 가 \$41.99  
 105 12 , 가  
 \$82.99 105 31  
 , 가 ( ) 가  
 가 가 가 .  
 가 가 가 .57)  
 TV 가 가  
 , 가  
 . 가  
 가 가  
 가 가  
 , , 가  
 TV 가 가  
 (4가 ) 가 ,  
 ( , , , )  
 TV

---

56) , “ , p.64

57) , “ , , , ,  
 2000, p.70-71

< - 19 > TV

		가 ( )	
	(SELECT CHOICE)	\$21.99	50
	(TOTAL CHOICE)	\$31.99	105
	TOTAL CHOICE STARZ!	\$41.99	+ 4 STARZ!+ 8 Encore
	TOTAL CHOICE SHOWTIME	\$46.99	+ 5 SHOWTIME, PLUS 2 TMC, FLIX, Sundance Channel
	TOTAL CHOICE HBO	\$46.99	+ 5 HBO, PLUS 2 HBO Family, 3Cinemax
	TOTAL CHOICE HBO/ STARZ!	\$51.99	+ 5 HBO, 4STARZ!, PLUS2 HBO Family, 8Encore
	TOTAL CHOICE STARZ!/ SHOWTIME	\$56.99	+4 STARZ!, 5SHOWTIME, PLUS 8 Encore, 2 TMC, FLIX, Sundance Channel
	TOTAL CHOICE HBO/ STARZ!	\$59.99	+ 5 HBO, 4STARZ!, PLUS 2 HBO Family, 8Encore, 3Cinemax
	TOTAL CHOICE HBO/ SHOWTIME	\$64.99	+ 5 HBO, 5SHOWTIME, PLUS 2 HBO Family, 2 TMC, 3 Cinemax, FLIX, Sundance Channel
	TOTAL CHOICE HBO/ STARZ!/ SHOWTIME	\$74.99	+ 5 HBO, 4STARZ!, 5 SHOWTIME, PLUS 2 HBO Family, 8 Encore, 2 TMC, 3 Cinemax, FLX, Sundance Channel
	TOTAL CHOICE PLATINUM	\$82.99	+ + The Golf Channel, Fox Sports World, Speedvision, Outdoor Life Network, NBA.com TV and over 20 regional sports networks from Fox Sports Net.
	FAMILY Pack	\$ 5.00 가	Boomerang, Oxygen, DIY(Do It Yourself), Odyssey Network, PBS KIDS Channel, Discovery A la carte Kids Channel, The Biography Channel, SoapNet and PBS
	SPORTS Pack	\$10.00 가	The Golf Channel, Fox Sports World, Speedvision, Outdoor Life Network, NBA.com TV, 20 (Fox Sports Net)

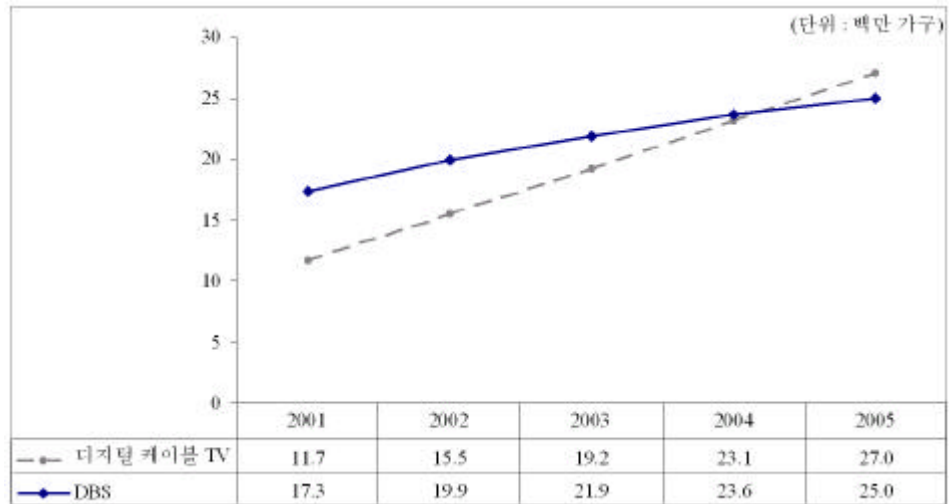
\* 가 , p.66. 가

가 가 가 TV  
 4 \$69.99  
 2 TV  
 .58)

,  
 TV NFL(National Football League) HBO  
 , 가  
 TV  
 HBO HBO  
 NBC MSNBC, CNBC  
 USSB  
 .  
 (DBS) 가  
 TV 가  
 가 가 가 2005 2,500 가 Yankee  
 Group 'Direct Broadcast Satellite: Growth in New Directions'  
 .59) TV  
 [ -2] .

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58) , , p.65  
 59) "The Yankee Group Forecasts Direct Broadcast Satellite To Reach 25 Million Subscribers by 2005", Yankee Group Press Release, September 19, 2000.



“The Yankee Group Forecasts Direct Broadcast Satellite To Reach 25 Million Subscribers by 2005”

[ - 2 ] TV DBS 가 1)

TV

가

(Digit a

Video Recorders(DVR) Personal Video Recorder s(PVR)  
TV가

TV

가 가 가 가

60)

60) , “ TV (DBS) 가 ”,

, 2000, 12.

<http://www.kisdi.re.kr/publishing/view.html?id=2404&db=kis05new>

, TV .  
 , 가 가 .  
 가 가 ( )  
 1998 300 2000 150 2 100% . 가  
 40 .  
 , 가 DVR 가 가  
 DVR ,  
 / . 가  
 23%가 DVR 가 ,  
 , 가 가  
 가 32%가 DVR ,  
 .  
 , 가 . 가 79%가 가 가  
 , 38% 가 가 가  
 .  
 가 가 가 가 .  
 (local-to-local service)  
 가 .  
 가 .  
 DSL ,  
 , 가 .

6)

2000

50

70

가

Hearst	Argyle	4	CBS가	King World	Tribu
			760	가	300

WB UPN 가  
가

가

(1)

가

( ) 가

가 GNP,

( ), ,가 가

, GNP

가

가 가 가 . <  
 -20> 가  
 , 가 .  
 < -20> ,  
 가 300 15,000\$ 30,000 150,000\$ , 가 100  
 가 , 가 10 .  
 가 가 가 . , ,  
 , 가 가 가 60  
 200 가 . ,  
 , 가 300 400 , 가 5  
 60-80 .

< -20> 가 가

( : US \$)

	( )	TV			
	10,000 30,000	15,000 70,000	15,000 600,000	4,000 10,000	8,000 20,000
	300 15,000	400 20,000	750 50,000	200 5,000	200 10,000
	30,000 150,000	45,000 175,000	50,000 3,000,000	10,000 50,000	10,000 40,000
	30,000 200,000	40,000 400,000	50,000 4,000,000	12,500 50,000	12,000 45,000
	15,000 5,000	6,000 15,000	20,000 125,000	800 1,200	800 3,000
	1,500 5,000	5,000 10,000	6,000 15,000	1,500 3,000	500 2,500
	30,000 80,000	30,000 150,000	50,000 3,000,000	800 3,500	800 3,000

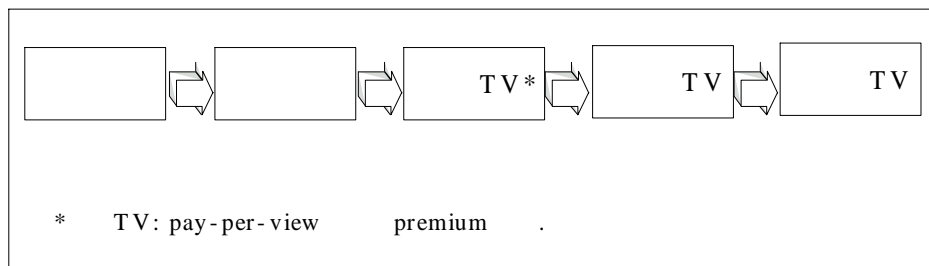
< -20>

	15,000 50,000	20,000 200,000	15,000 3,500,000	5,000 25,000	10,000 60,000
	200 20,000	750 35,000	1,000 65,000	200 6,000	200 12,000
	750 2,500	1,500 5,000	1,500 6,000	500 2,500	350 2,000
	1,500 14,000	3,500 20,000	15,000 2,000,000	1,500 10,000	750 15,000
	3,000 30,000	15,000 100,000	15,000 2,000,000	2,500 1,800	2,500 15,000
	3,500 10,000	5,000 12,000	10,000 25,000	1,500 2,500	2,500 3,500
	1,000 8,000	4,500 12,000	8,500 50,000	750 3,000	1,500 5,000
	500 4,500	700 5,000	400 2,000	400 2,500	500 5,000
	30,000 150,000	50,000 175,000	15,000 3,500,000	5,000 25,000	10,000 65,000

: The Hoolywood Repoter, 2000 4

, 가 .  
 가 . 가  
 가 .  
 가 , [ -3]  
 TV' . 가 61) 가 ,  
 61) , , 가 가  
 ( 가가 , 가 ),  
 가

가  
 . (box office)가 10  
 , 20 50 , 100 가 (  
 ) .62) 100  
 2 TV( 가  
 ) 가 . < -20>  
 가 가 가 .  
 가

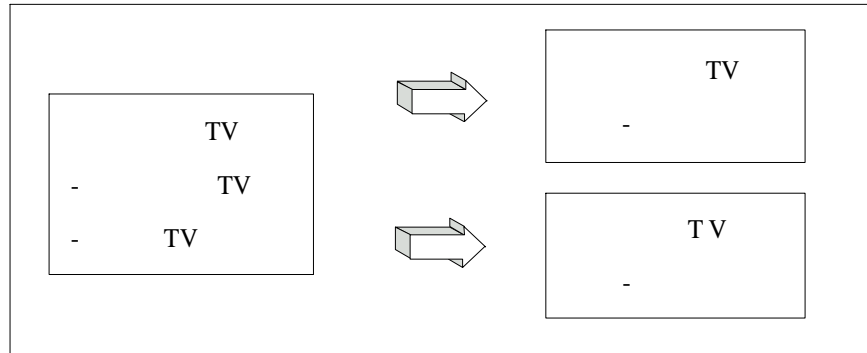


[ -3]

[ -3] ( )  
 . (TV right) TV  
 TV .  
 TV  
 , .  
 (first run)  
 TV (return) .

---

62) “ 가 ”, 21, 2001, 8, p.21.



[ -4] TV

TV ,

TV TV

가 ,  
 가 가 . , ( )  
 , 가 . < -21>  
 가 가 가  
 , 가 가  
 ( )<sup>63)</sup> ,  
 가 가 가

63) ( ) 가 CPS(cost per subscriber) 가  
 . 가 가

< -21>

가

( : US \$)

가			TV		
	TV ( )	-	-	-	-
	PBS( )	35,000- 66,404	66,400	2,000- 5,000	16,000- 30,000
		50,000- 120,000	-	5,000- 40,000	50,000- 200,000
		10,000- 15,000	100,000- 150,000	5,000- 40,000	25,000- 50,000
		16,600	25,000	8,300	13,200- 40,000
	( )	16,000	30,200	8,300- 25,000	13,200- 40,000
		830	3,000	1,600	1,000- 10,000
		40,000	41,500	15,000- 25,000	25,000- 80,000
		-	25,000	8,300	20,000
		8,300	13,200	3,000	5,000- 10,000
		25,000	15,000- 80,000	15,000- 20,000	10,000- 50,000
		8,300	23,000	13,280	6,640
		10,000	10,000	6,600	5,000- 10,000
		16,000- 25,000	16,600	8,300	1,000- 5,500
		5,000- 8,000	13,300	830	1,200- 4,500
		3,000- 6,000	-	830	2,000- 5,000

: TBI, April 2001

(worldwide right),  
 가 가 ( , , ),  
 , ( ) , 가  
 .64)

(2)

65 80% (clearance) .65)

, 100 120 ,  
 150 120 .  
 , 가 1  
 , 가 가 , 400  
 .66)

---

64) , pp.22-23.

65) <http://www.tvinsite.com/broadcastingcable/Programming>

66) '美, , 2000, 3, p.34

< -22> 1999 2000 5

			가 (%)	가 ( )
1	Wheel of Fortune	King World	10.7	10,765
2	Jeopardy	King World	8.8	8,882
3	Wheel of Fortune	King World	4.6	4,642
4	Hollywood Squares	King World	4.2	4,239
5	Family Feud	Pearson	1.7	1,734

\* 1999 8 30 11 21

\*\* 가 (Household AA%) 가 (1 80 가 )

\*\*\* 가 (Household AA) 가

Broadcast, 2000 1 21

< -23> 1999 2000 5

			가 (%)	가 ( )
1	Judge Judy	Paramount	7.3	7,326
2	Judge Joe Brown	Paramount	4.0	4,029
3	Divorce Court	Twentieth	2.9	2,984
4	People's Court	Warner	2.5	2,532
5	Judge Mills Lane	Paramount	2.2	2,253

Broadcast, 2000 1 21

< -24> 1999 2000 5 -

			가 (%)	가 ( )
1	Friends	Warner	6.3	6,313
2	Seinfeld	Columbia TriStar	5.7	5,731
3	Frasier	Paramount	4.8	4,827
4	The Drew Carey Show	Warner	3.7	3,728
5	The Simpsons	Twentieth	3.5	3,548

Broadcast, 2000 1 21

< -25> 1999 2000 5 -

			가 (%)	가 ( )
1	The X Files	Twentieth	4.2	4,251
2	ER	Telepictures	3.8	3,867
3	Walker Texas Ranger	Columbia TriStar	2.7	2,734
4	Star Trek : Deep Space Nine	Paramount	2.6	2,631
5	Profiler	Carsey-Werner	2.2	2,194

Broadcast, 2000 1 21

가 ( ) , 1996

가 , 1996

가 (Who Wants To Be A Millionaire?)가 ABC

1996 가 (Judge Judy)가

가

(Judgement Day), 'Moral Court'

< -26> 1999 2000

20

			( )
1	Friends	Warner	118.3
2	Jenny Jones	Warner	82.9
3	Home Improvement	Buena Vista	73.6
4	Extra	Warner	65.8
5	Seinfeld	Columbia TriStar	61.9
6	The Oprah Winfrey Show	King World	60.6
7	Entertainment Tonight	Paramount	50.1
8	The X Files	Twentieth	49.9
9	News Radio	Columbia TriStar	47.5
10	ER	Warner	46.4
11	Wheel of Fortune	King World	43.6
12	Extra	Warner	43.2
13	Rosie O'Donnell	Warner	42.6
14	Ricki Lake	Columbia TriStar	41.7
15	Living Single	Warner	41.0
16	Frasier	Paramount	39.1
17	Mad About You	Columbia TriStar	38.6
18	Grace Under Fire	Carsey-Werner	31.1
19	Entertainment Tonight *w/e	Paramount	30.6
20	Star Trek : Deep Space Nine	Paramount	29.2

\*w/e : 가 .  
: "美", , 2000, 3, p.37.

(3)

. 1998  
26 ( 5.5%)  
, 7 9% .  
가 . FCC가  
, 가 35%



1

가 1

AOL

(Convergence) 가 , ,

AOL-Time Warner

, AOL-

AOL

가

.69) , 가

가

, AOL

AOL

가

AOL가

DSL(Digital Subscriber

Line)

가 , AOL AOL-

AOL 가

AOL

2,600 가

(Community)

ICQ, AOL

69) , "AOL , 21

가?", 21, 2000, 8.

가 , AOL 가 .  
 AOL , AOL-  
 가 20% , DVD 가  
 .70)  
 . 1998 6 9,000 가 275  
 1 .  
 , , , 5  
 AOL  
 < -27> ,  
 TBS CNN, , TNT,  
 Court TV 50%  
 HBO HBO  
 MSO , 2 .  
 WB

---

70) “ . AOL”, The New Media, 2001, 1.

< -27>

	HBO, Court TV(50%), Comedy Central(50%), HBO Asia(40%), HBO Brazil(23%), HBO Ole(29%), Time Warner Sports, Cartoon Network, CNN, TBS, TNT, Turner Classic Movies
	Time Warner Cable, Time Warner Entertainment-Advance/Newhouse Partnership(65%)
	* Kids' WB!, Telepictures Productions, Warner Bros. Animation, Warner Bros. Consumer Products, Warner Bros. International Television Distribution, Warner Bros. International Theatres, Warner Bros. Pictures, Warner Bros. Studio Stores, Warner Bros. Television, Warner Home Video, The WB Television Network, Castle Rock Entertainment, New Line Cinema, Time Warner Entertainment Japan(37%) * Atlanta Braves, Atlanta Hawks, Atlanta Thrashers * Time Warner Digital Media, Time Warner Telecom(48%), Warner Bros. Online
	* Bookface, Book-of-the-Mouth Club, Leisure Arts, Little Brown and Company, Oxmoor House, Sunset Books, Time Life, Warner Books * Entertainment Weekly, FORTUNE, In Style, LIFE, Money, Southern Living, Sports Illustrated, Time
	Atlantic Recording, Elektra Entertainment Group, Giant Merchandising, London-Sire Records, Rhino Entertainment, Warner Bros. Records, Warner Music International, Warner Special Products, Warner/Chappell Music, WEA

\*() 가 가 75% .  
: Wall Street Journal Online. "AOL- , ",  
21, 2000. 8. p.39.

가  
 . < -28>  
 1999 7  
 80 7,500 28% 가  
 가 61 1,100  
 22%, 53 7,400 19% .  
 가 .71)

< -28>

(1999 )

	( )	(%)
	8,075	28
	6,111	22
	5,374	19
	4,663	16
	3,834	14
(The WB Network)	384	1
	1	-
	(1,109)	-
	27, 333	100.0

: , p.40

가

. < -29>

71) "AOL- , ", 21, 2000, 8, p.140.

MSO 가 가 ,  
 MSO 가 , 1999  
 MSO 가 52%  
 85% . 2000 MSO가 65%  
 95% , 2001 MSO 73%  
 100% 가 .

< -29> MSO 가 가 ( )

MSO\	1999	2000	2001
Cox	55%	74%	84%
AT&T	51%	75%	82%
MediaOne	70%	80%	85%
Time Warner	85%	95%	100%
Cablevision	60%	80%	95%
Comcast	50%	70%	85%
	15%	15%	15%
	52%	65%	73%

: Sanford Bernstein & Co.

[http://www.ran.org/ran\\_campaigns/beyond\\_oil/oxy/sbernstein.pdf](http://www.ran.org/ran_campaigns/beyond_oil/oxy/sbernstein.pdf)

가 S&P , 1999  
 가 AOL 1,690  
 11 .72) ISP ,  
 가 ,  
 / AOL  
 , AOL

72) Jupiter Media Metrix, "AOL-Time Warner Account For One Third of All Time Spent Online", 2001 News Releases

가  
 AOL 가  
 , 가 AOL 가  
 . 1990 가  
 (Internet Service Providers: ISPs) AOL

< -30> 10 (ISPs)

ISP	가 ( )	(%)	(%)
AOL	26.5	36	71
/	5.7	8	84
	4.9	7	2,213
AT&T	4.7	7	208
	4.5	6	759
	3.7	5	1,500
SBC	3.0	4	465
	2.6	4	2,935
	2.3	3	1,284
	2.2	3	120
	12.5	17	28
	72.6	100	111

\* 1999 가 2003  
 : Forrest Research

< -30> , 10 ISPs AOL 가  
 2,600 36% ,  
 / 가 가 570 8% ,  
 , AT&T, , SBC,  
 3-7% . 1999 가

70

2003 가  
 가 2 AOL 71%  
 . 가  
 2,900%, 2,200%, 1,500%  
 .  
 ISP  
 가  
 .  
 가 ISP , AOL  
 .  
 , , ,  
 . AOL 가  
 .  
 AOL  
 ,  
 , ,  
 .

## 2) Walt Disney

1998 229 7 6 11 7  
 , , 가 ,  
 가  
 .73)  
 가

---

73) <http://www.mediamanagement.org/media.../88cf78d2a007b45fc/> OpenDocumen

(Michael Eisner)  
. ABC

1996

ABC

가

가

,  
가

, 1993 6

1996 1:1 65

/ABC

LA

KCAL 3

8 7

/ABC

190

200

. 1997

1 5

.74)

가 가

, 가

, 가

.75)

가 , 가

1990

. < -31>

, 1998

. 1995

1996

, 1997

74)

pp.123-124.

75)

“ 가 ”, , 99 8 30

. 1998

ESPN

가 , , , ,  
10 50% 가 .76)

< -31>

	(%)		(%)
ABC TV Network	100.0	(1995 )	N/A
9 TV	100.0	(1995 )	N/A
ESPN	80.0	(1996 )	N/A
ESPN2	80.0	(1996 )	N/A
ESPNNews	80.0	(1997 )	N/A
Classic Sports Network	80.0	(1997 )	N/A
	100.0	(1997 )	N/A
A&E	37.5	(1998 )	N/A
	50.0	( )	N/A
	37.5	( )	N/A
E! Entertainment	39.6	RTL( )	50.0
		RTL2( )	23.0
		TVA( TV)	10.0
		HBO Ole( )	N/A
		GMTV( )	20.0
		HBO( )	N/A
			33.0
		( )	25.0
		ESPN	50.0
		ESPN ( )	50.0
		( )	33.0

: Baskerville Communications Corp. Deal Memo, 5(21), October 26, 1998.

< -31> ,

ABC ,

, E! 37.5% , 39.5%, ESPN 80%, A&E , 가 , (49%), . , .

/ABC 1999 42 2 34 2 13 , 0.47, 가 802 GE

NBC 51.7% 가 .77) 2000 , 가 21 가 , 가 13 , TV 6 가 가 1 . < -32> , 2 , 가 .

---

77) , 2000, 3

&lt; -32&gt;

가

		2000	2001	2002	
	ABC	EBITDA	469	534	954
		가	11.0×	10.5×	10.0×
		가	5,164	5,607	5,937
	T V	EBITDA	598	619	660
		가	13.0×	12.5×	12.0×
		가	7,776	7,736	7,916
		EBITDA	223	225	263
		가	20.0×	19.5×	19.0×
		가	4,453	4,388	4,992
	TV	EBITDA	334	351	368
		가	2.5×	2.5×	2.5×
		가	835	876	920
		EBITDA	1,306	1,575	1,801
		가	20.0×	19.5×	19.0×
		가	26,126	30,709	34,213
	EBITDA	118	224	371	
	가	16.0×	15.5×	15.0×	
	가	1,893	3,478	5,564	
&	EBITDA	2,163	2,392	2,712	
	가	13.0×	12.5×	12.0×	
	가	28,121	29,896	32,547	
	EBITDA	598	648	722	
	가	13.0×	12.5×	12.0×	
	가	7,776	8,102	8,662	
가		82,145	90,793	100,752	

\*

\*EBITDA(Earnings Before Interest, Taxes, Depreciation and Amortization)

: Prudential Securities

<<http://www.prufn.com/investments/overview/0,2991,851,00.html>>

&lt; -32&gt;가 ,

가 , 2000

20 가 , 16 ,

TV 13 .

TV 2.5  
 . 2  
 .  
 2000 가 ,  
 2 80 , TV 77 , ABC 2 60  
 51 . 2  
 2002 3 40 86  
 3 20 .78)  
 TV TV  
 가 ,  
 TV 가  
 가 . 가  
 . 2 9  
 ,  
 ,  
 .  
 TV  
 , ABC  
 가 .

---

78) “ , ”, 21, 2000, 10, p.59

3) Viacom/ CBS

FCC CBS  
 (99 5 3 ) .79)  
 1998 가 11 6,700 가  
 , , 4  
 . , /  
 , 2000  
 2 .80)  
 MTV, , VH-1, Showtime,  
 , CBS UPN , FCC  
 .  
 , 6,000  
 . 5  
 1 , (Simon &  
 Schuster), (Macmillan), (Prentice Hall)  
 .81)  
 . 가  
 ,  
 .

79) “子 母 ”, 美 , CBS , , 99 9 9  
 80) <http://www.viacom.com/press.tin?ixPressRelease=65003671>  
 81) “美 FCC, Viacom-CBS ”, , 2000, 6

가

가

가 120 (23.34%),  
 5% 4 (9.99%) 3 (67.80%)  
 CBS 200 가

.82)

< -33 >

( : )

	1998	1999		2000 ( )	
	3,149.0	3,587.0	14%	4,024.0	12%
(CBS)	5,140.0	5,088.7	-1%	5,547.4	9%
(CBS)	546.0	565.0	3%	619.5	10%
(CBS)	0.0	13.0	NA	40.0	208%
(Viacom)	2,607.9	3,045.5	17%	3,507.9	15%
	4,757.8	4,618.1	-3%	5,008.7	8%
	3,893.4	4,463.5	15%	4,985.6	12%
	421.2	390.8	-7%	423.1	8%
	546.6	610.7	8%	622.9	2%
	13.7	29.8	118%	70.0	135%
(Viacom)	(162.5)	(299.6)		(299.6)	
(CBS)	(7.0)	(25.0)		(50.0)	
	20,924.4	22,087.5	6%	24,849.0	13%

\*( ) : Morgan Stanley, “ /CBS, M&A ”, 21, 2000, 7.

82) [http://www.viacom.com/proforma\\_2001.tin](http://www.viacom.com/proforma_2001.tin)

< -33> , , ,  
 ,  
 , CBS  
 1998 1999 , CBS  
 1% , 3% , 7% ,  
 6% . 2000 ,  
 13% . (208%)  
 (15%)

. MTV 가  
 43% , Showtime  
 가 19% 가 .  
 2,340 .83)  
 , 2000 3 UPN 50%  
 , 가  
 12%  
 . DVD 47.9% 1  
 ,  
 , 147%  
 , 1 4,000 가  
 . CBS  
 .84)

MTV

83) Jeffrey & Company

84) “ -CBS, M&A

”, 21, 2000, 7

가 /  
CBS

가 .  
가

(Cross Promotion)

#### 4) Fox Entertainment Group

2  
가 LA  
. 2000 , 10%  
30 7 .85)

가 .

200 가

3 .

80

20

. 20

(off-network programming)

가

가 98%

. 23

50%

가

.86)

가

가

(O&O; Owned and Operated) 10

49.5%

24

.87)

(Fox Family Worldwide) 가

86) Electronic Media, 2000 3 20

87) <http://www.foxnews.com/onlyonfox/>

< -34 >

( : )

	1996	1997	1998	1999	2000	2001	2002	2003
	2,324	3,112	3,876	4,416	3,856	4,126	4,612	4,958
	2,224	2,698	3,075	3,449	3,483	3,779	4,052	4,218
	-	37	72	192	1,250	1,500	1,735	1,915
	142	138	292	397	179	200	200	207
	436	490	727	711	810	910	999	1,060
	-	(123)	(96)	(75)	107	200	290	332
가	24	25	26	42	51	54	56	59
	73	131	172	215	207	218	227	236
	-	25	45	58	182	195	197	201
	118	113	266	355	128	146	144	148
	363	360	555	496	603	692	772	824
	-	(148)	(141)	(134)	(75)	5	93	131
	0.75	0.05	0.32	0.33	0.20	0.30	0.45	0.52

\*2000-2003 . \*( )

: Salomon Smith Barney

<<http://www.salomonsmithbarney.com/splash/relieffund.html>>

< -34 > , 45% , 20% , 19% , 15% 가

1996 2003 가 , 2000

가 가  
 가 .  
 , 1 3,000  
 4 ,  
 1996 4 3,600 2003 10  
 가 1999  
 가 2000 1  
 가  
 가 가  
 가 가  
 2000  
 가 가  
 1996 75  
 가 1997 5 , 2000 20 2001  
 30 .88)  
 . 2000 8 10  
 (Chris-Craft) BHC  
 . 53  
 5,000 ,  
 82% 3% 가  
 .89)

---

88) "Fox, ", 21, 2000. 12  
 89) " , M&A 가 ", , 2000. 11

가 23 3

3

4.

1) 2001-2002

(1) NBC

NBC 2001

가

. CBS 'Survivor' ,

가 . 가

NBC

'Weakest Link'

. ABC

'Who Wants to Be a Millionaire?'

NBC가

가 가

.90)

, NBC

가 (Emeril Lagasse)

'Emeril'

90) "美, , 가 ", , 2001. 7

'Law & Order : Criminal Intent' . ABC 'NYPD Blue' . 'The West Wing' 2000

.91)

(2) CBS

CBS 'Nash Bridges' 'Diagnosis Murder' 'The Amazin Race' . ABC가 'Once and Again' '20/20' 10 (1 10 ) CBS '48 Hour' 10

가

'Wolf Lake'

가

'The Guardian'

'JAG' 'Judging Amy'

'60 Minutes II'

'The Amazing Race'

CBS가 'Survivor'

가

'Survivor' 3

10 , 4 2002 3 .92)

(3) Fox

Fox 가 . 200

4

'Boston Public', 'Dark Angel', 'Grounded for

'Temptation Island'

91) “美 , ”, , 2001. 4

92) “美 ”, , 2001, 6

4 10  
 Fox  
 Fox 'Temptation Island'  
 2000 NBC 'The West Wing' Fox  
 9  
 CBS 'Survivor'  
 Fox Fox  
 'Temptation Island'  
 Fox  
 'X-File'

(4) ABC

2001-2002 ABC 가 . 가  
 'Once and Again'  
 ABC (Barbara Walters)  
 '20/20' . '20/20' 9  
 10 가 'NYPD Blue'가  
 12 'The Mole'  
 10 'The  
 Mole'  
 'Once and Again' '20/20'  
 Once and Again' 'The Mole'  
 가 . ABC NBC 'Law & Order'

'Once and Again' , , , 10 .  
 'Who Wants to Be a Millionaire?' 4  
 ,  
 .93) 2 (1 , 1 )  
 . 8 NBC  
 가 'Weakest Link'

, NBC 'The West Wing'  
 ABC 'The Court'  
 NBC 'The West Wing' ABC가

(5) WB

WB 'Felicity' 9  
 . Warner Bros.  
 WB 'Buffy the vampire slayer'  
 WB가  
 UPN 'Buffy'  
 18-34 .  
 'Buffy' ' (Angel)' , '  
 , Fox 'Dark angel'  
 .94) WB 'Felicity'

(6) UPN

UPN ' ,

---

93) “美, ABC ”, , 2001.3  
 94) “ ”, , 2001. 8

UPN 'Star trek : Voyager' , 'Star Trek'  
 , 'Star  
 1/4 , 'Star  
 trek' 'Buffy' .95)  
 'Moesha', 'The Hughleys',  
 'The Parkers' UPN  
 , 'WWF Smackdown !'  
 , UPN . UPN  
 가 1% ,  
 .96)

NBC가  
 , Fox 가 .  
 , .  
 2) 2001  
 2001 (Nielsen) ,  
 .  
 HGTV(Home Garde  
 Television), Court, Cartoon Network  
 .  
 가 Fox가 가 ,  
 , (USA, TNT, TBS, F  
 TNN) .

95) <http://www.upn.com/upn.html>

96) “ ”, , 2001. 8

, TNT ,  
 , TBS 'The Nashville Network' 'The National Network'  
 TNN  
 FX 4  
 가 .97)  
 FX 가가  
 가  
 'Baywatch' ' (Son of beach)'  
 , 'Ally McBeal' 'Buffy the vamp  
 slayer' , 가 . < -35> <  
 -36> 5  
 가

< -35> (basic-cable)

	1996	1997	1998	1999	2000	
Viacom/MTV	2.8	3.1	3.5	3.8	3.7	6.8%
Fox	1.1	1.1	1.3	1.1	1.3	5.5%
/TBS	4.2	4.7	4.7	4.8	4.6	2.6%
	1.3	1.3	1.5	1.6	1.4	1.8%
NBC	0.4	0.3	0.4	0.5	0.4	1.6%

: (Nielsen Media), (Morgan Stanley) ,  
 2001, 8, p.81.

97) “美 ”, , 2001, 8, pp.80-81.

< -36> /

	1996	1997	1998	1999	2000	
NBC/NBC	12.7	10	9.3	8.7	8.3	- 10.1%
Fox/Fox	5.3	5.5	5.6	5.2	5	- 1.8%
/ABC	10.4	9.5	9	8.9	10	-0.9%
ABC/WB/TBS	4.8	5.7	6	6.2	5.9	1.8%
Viacom/ CBS	12.4	12.7	12.9	13	12.5	1.6%

: (Nielsen Media), (Morgan Stanley),  
2001, 8, p.82.

< -36> , 5  
9% 가 21% 29.8% ,  
4% , 41.4% 35.3% .  
가 4%  
2001 TNT 5 30%  
2% 1.4% , USA 27% 2.2%  
1.6% . TBS 10% , 2.1% 1.9%  
, Fox 2000 0.7% (.98)  
MTV VH1 150% , Sci-Fi 80% , MTV  
TLC(The Learning Channel) 50% 가 . HGTV, Animal Pla  
History Channel  
Court TV

98) “ TV , ”, , 2001. 1

. TNN Viacom  
, The Family Channel

TNT , AOL/ Warner Bros  
'ER' 'Law & Order'  
'Witchblade' . FX

, Lifetime, Court TV, HGTV

(MVPD)

3) ,

(1) , FOX- '70 '  
2001 3 , 가 '70 '

가 . 가  
가 . 70  
(The American Spirit) , (Watergate)

가  
. 70 '70 ' 98 Fox  
(The Cosby Show)  
(Carsey-Werner) (Mark Brazill),

(Bonnie Turner), (Terry Turner)  
. 98 8 ' (The Simpsons)' 가  
, ABC 가 가 가(Who Wan  
to be a Millionaire)  
'70 ' 1976 (Wisconsin)

30 , (18 49 ) 8 8  
 , '70 ' ' 1,180  
 1,260 Fox  
 2003 5 .99)  
 '70 ' ,  
 70  
 , (Farah Fawcett)  
 (Dallas Cowboys) , (Capenters)  
 '70 ' , Fox  
 ,  
 Fox  
 '70 ' ,  
 2002 가  
 , LA, 20  
 17 가  
 '70 ' 200 , 1  
 '70 ' ' ,  
 50% .100) '70 ' ,

---

99) “ , ”, , 2001, 3, pp.59-60.  
 100) “美, Fox '70 ' , ”, , 2001. 3

2000 TV ,  
 18 34 가 . TV  
 75% ‘ ’ . 2000  
 100 .  
 18 34  
 10 , ,  
 .  
 FX ‘  
 (Son of the Beach)’ , TBS 가 ‘  
 (regular guy)’ .  
 (Comedy Central) ‘ (South Park),  
 (The Man Show)’ , ‘ (Battleboots)’ .<sup>101)</sup>  
 25 Sci-Fi , 가  
 ( 1 150 가 ) ‘ (Farscape)’  
 . TNT  
 ‘ (Bull)’ A&E ‘ (Nero Wolfe)’  
 . ‘ ’ 1997 ,  
 1,2 , ,  
 가 . < -37>, < -38>, < -39>  
 2000 3/4 .

---

101) , p.56

&lt; -37&gt; 18 34

			/
1	South Park	Comedy	3.7/ 781,000
2	Real World IX	MTV	3.4/ 786,000
3	Battlebots	Comedy	2.4/ 510,000
4	Parmclub.com	USA	1.9/ 453,000
5	Road Rules IX	MTV	1.6/ 365,100
6	The Man Show	Comedy	1.3/ 280,500
7	Ripley's Believe....	TBS	1.3/ 313,500
8	Howard Stern	E!	1.1/ 224,300
9	Celebrity Death Match	MTV	1.0/ 241,400
10	Son of a Beach	FX	1.0/ 168,600

: , , 2001 1 , p.56.

&lt; -38&gt; 18 34

			/
1	Real World IX	MTV	4.1/ 959,000
2	Road Rules IX	MTV	2.2/ 492,830
3	South Park	Comedy	2.0/ 397,500
4	Lyricist Lounge	MTV	1.4/ 324,330
5	Any Day Now	Lifetime	1.2/ 284,200
6	Farmclub.com	USA	1.1/ 263,800
7	Strong Medicine	Lifetime	1.1/ 258,290
8	Making the Voice	MTV	1.0/ 232,200
9	New Detectives	Discovery	1.0/ 245,400
10	Ripley's Believe.....	TBS	0.9/ 221,830

: , , 2001 1 , p.57.

< -39> 18 34

			/
1	Real World IX	MTV	3.7/ 1,745,000
2	South Park	Comedy	1.8/ 1,178,000
3	Road Rules IX	MTV	1.8/ 857,930
4	Battlebots	Comedy	1.6/ 661,000
5	Farmclub.com	USA	1.5/ 716,800
6	Lyricist Lounge	MTV	1.2/ 55,000
7	Ripley's Believe....	TBS	1.0/ 535,330
8	Howard Stem	E!	1.0/ 385,000
9	The FBI Files	Discovery	1.0/ 454,330
10	The Man Show	Comedy	1.0/ 412,670

: , , 2001 1 , p.57.

18 34

18 34

34

가

가

(Ford)

1999 MTV

18 34

가

가

가

(2)

2000

가

가

2000 가 가 가? 2000 6 , CBS ' (Survivor)'가 , ' ' ' 가

.102) CBS '(Big Brother) 2000 7 5 13.9

가 가

< -40>

< -40>

( : )

	1996	1997	1998	1999	2000
/	57	57	57	55	48
( , )	10	12	13	14	15
	12	10	10	11	16

: , 2000, 8, p.84.

102) “ , ”, , 2000, 8, pp.83-84.

TN Media가

, 96 가 57 48  
 . , 96 47 가 29  
 .103) 가

) (Survivor)  
 ‘ ’ 16 가

. CBS가  
 , 가

2000 6 가 ,  
 10.0% ‘ ’  
 가 . 18 40  
 ‘ ’ ‘ ’ 22%가  
 18 34 4.3% 92 , CBS가 8  
 .104)  
 가 .

103) , 2000, 8, p.85.

104) <http://www.tvinsite.com/broadcastingcable/index.asp?layout=story&articleId=CA179879&display=searchResults>

) (Big Brother)

. , CBS 2000 7  
 . 5 1,800  
 . 가 28 , 60 가  
 , 가 , ,  
 가 가 가 가  
 가 가 가 가  
 . 2 가  
 . 3  
 가 , 50

)19 (1900 House)

. 1999 가 ,  
 PBS가 2000 6  
 가 , (19 )  
 가 가 19  
 3 가  
 19 , ,  
 , ,

98

19

19

2.0%

.105)

. PBS 2000 6 12

3.6% . PBS

가 .

가 .

가

.106)

105) Broadcasting & Cable, 2000, 6. 25

106) , 2000, 8, pp.83-88.

•

1. 107)

1)

.108)

가 (creative industry)

가

.109)

(core activities): , ( , ,

( , )

(related activities): , , ,

, , TIVO (PVRs), VOD,

, PR , TV , ,

(related industries): , , &

107)

, 가 가

2000 12

가 1 1,881 , 1,260 ,

1,187 .

108) Tambini, D., "Introduction", in Tambini, D. (Eds). *Communications : Revolution and Reform*. London; IPPR. p.3.

109) DCMS, "Creative Industries : Mapping Document 2001", 2001.

'Television and Radio' .

100

가  
 (audience) (customer)  
 가 가 가  
 ,110)

2)

BBC  
 1980 가  
 10 , BBC  
 가  
 가 가 , 1981  
 가  
 가 2 가  
 가  
 , , , 가

---

110) 130 1,125  
 103 16%  
 5% . DCMS, .

. 1990

가 가

가

가

. 1997

2000

.111)

1998

가

. 1998

, 2000

CPBF

(white paper)

(white flag)

21

‘e- society’

e- societydmk

가

가

111) O'Malley, T., 'Communications revolution :who benefits?', CPBF. 2000.



1 15%

2000

가

(Vivendi) BskyB 24.44%

가

가

가 (digital conditional access technology)

News Corporation NDS

(Canal+) SECA 50%

. BskyB News Corporation

ITV Digital

.113)

가 가

. 2000 '(A new future for communications)

OFcom

(Broadcasting Standards Commission), (Independent Television Commission), (Radio Communications Agency), (Radio Authority), (Ofcom)

FCC . BBC OFcom

BBC

---

113) Competition Commission, 'Annual Review and Accounts 2000/ 2001', 2001. p.25.

. BBC  
 . BBC  
 . ,  
 .114)  
 (EU) 가  
 . ,  
 , 가  
 , .  
 , .  
 , .  
 , .  
 , .  
 , ITC , (Office  
 Communications, OFCOM) . OFCOM ,  
 가 2001  
 .  
 (financial transparency)  
 BBC ,  
 BBC 가  
 ,  
 가 ,  
 가 BBC  
 . BBC  
 BBC (BBC Group)  
 .  
 가 BBC

---

114) Broadcast, 31 August 2001.p.1.

BBC 4 TV  
 5 가  
 BBC , 가 . BBC

3)

1998 11

21

'(digitalism)

가

. < - 1>

< - 1>

	BskyB	Canal+ TPS AB-Sat	Premier World FUN	D+ Stream	Canal+ Vai Digital
	ITV Digital BBC, ITV, 4, 5	(TF1, FT)	(ARD, ZDF)	(RAI)	Quiero
	NTL, Telewest	FT Canal+ Lyonnaise	Premier World	Stream	-
ADSL	Kingston Comm. BT, Atlantice.com	Netissimo 9Telcom Mongoose Star	DT Easynet	Telecom Italia Infostrada	Telecom Italia Infostrada

) <>

: NHK , <放送研究と調査>, 2001.8.p.11.

ADSL

가

1998 9 BBC

가

. ITV Digital 3 15 가 .

BBC BBC1, BBC2, BBC News24, BBC Choice, BBC Tex  
Parliament( ) . ITV Digital First ITV Digital, Carlt  
Network, Granada Plus, Granada Breeze/Men&Motors, UK Gold, UK  
Carlton Cinema, Sky Moviemax, Sky Premier, Sky One, Sky Sports  
Sports3, Eurosport, Cartoon Network, Shop!, Carlton Kids, Carlton  
Style, UK Play, Carlton Select

Sky Digital

Astra Eutelsat

Telewest NTL

70 가 . TV 가

30% 가

가

가

2006 2010

가

가

가 가

. 가

가

BBC

가

BBC

BBC

24

BBC

(poll tax)

BBC가

'(digital poll tax)

가

3

104

3

BBC

2

가

가

ITV Digital

가

.115)

가

2.

115)

“ , 36 가 ”, 33 , 2001.9. p.28.

< -2>

	1995	1996	1997	1998	1999	2000
( )	-	-	-	-	-	57.81
1 GNP ( )	18,126	18,650	19,230	20,733	23,997	-
가 ( )	23.90	24.10	24.30	24.50	24.60	24.16
TV 가 ( )	23.40	23.60	24.00	24.20	24.30	24.43
가 TV가 (%)	97.9	97.9	98.8	98.8	98.8	-
TV가 VCR가 (%)	79.6	81.6	83.1	85.3	86.4	-
TV가 CATV가 (%)	6.0	7.2	10.0	-	-	-
TV가 가 (%)	15.4	17.4	17.5	-	-	-
TV가 가 가 (%)	0.0	0.0	0.0	-	-	-
TV ( )	1,539.30	1,990.20	2,464.90	-	-	-
( )	2,732.00	2,875.00	3,017.00	-	-	-
TV ( )	3,367.00	3,598.00	3,997.00	4,732.40	5,884.0	-
1 TV ( )	57.46	61.19	67.75	79.94	120.82	-
( )	-	-	-	-	-	215

: IDATE, Zenith Media.

4가

1993

, 1996

(public corporation)

5가

. BskyB TV,

, TV TV,

. < -3> 가 (Guardian)

1

< -3> 10

1		News Corporation	, , ,
2		BBC	
3			
4		BskyB	
5			
6			
7		ITV/ITV Digital	
8		BBC	
9		NTL	, ,
10		Endemol Entertainment	

: Mediaguardian, Monday July 16 2001.

< -2>

70% 가 . , TV 5  
 가 TV 1995 1 TV  
 57 1999 120  
 가  
 TV TV  
 가 가 . 가 BBC  
 TV가 14 .

< -4> 가

( : )

BBC	4.4	4.5
Sky	20.4	22.8
, ,	61.7	63.6

: BBC

가

TV

TV

CPT(Cost-Per- Thousand)

< -5>

CPT 가

	ITV		C4		TV		C5				RPI
	£	%	£	%	£	%	£	%	£	%	%
1988	4.09	7.6	-	-	2	7.5			4.09	7.8	4.9
1989	4.45	8.8	-	-	2.45	22.5			4.45	8.8	7.8
1990	4.29	-3.6	-	-	2.36	-3.7			4.28	-3.9	9.5
1991	4.04	-5.8	-	-	2.42	2.5			3.99	-6.7	5.9
1992	4.09	1.2	-	-	2.72	12.4			4.04	1.4	3.7
1993	4.53	10.8	3.93	-	3.48	27.9			4.35	7.7	1.6
1994	4.89	7.9	4.96	26.2	3.83	10.1			4.82	10.8	2.5
1995	5.37	9.8	5.52	11.3	3.76	-1.8			5.26	9.1	3.4
1996	5.94	10.6	6.07	10.0	3.74	-0.5			5.71	8.5	2.5
1997	6.41	7.9	6.39	5.2	4.4	10.4	4.70		6.01	5.2	3.1
1998	6.81	6.3	6.78	6.2	4.74	8.3	4.29	-8.6	6.25	4.0	3.4
1999	7.14	4.4	7.05	4.0	5.39	13.7	4.29	0.0	6.50	4.0	1.6
2000	7.74	8.9	7.31	3.7	5.01	-7.1	4.37	1.9	6.76	4.0	2.2

: Zenith Media.'U.K. Media Yearbook', 2001.p.23.

1000 CPT 1990 4.28 2000 6.76  
 , TV 5 47+

1)

TV

(1)

1999 160 OECD  
 9.75% TV 70  
 . 2000 11

< -6 >

	( )	(%)
	24,102	20.8
	22,899	19.9
	19,966	17.2
	13,035	11.3
	11,572	10.0
	10,600	9.2
/	6,077	5.2
	3,550	3.1
	1,340	1.2
	2,628	2.3
	115,769	

: DCMS

50% 가

(2)

TV 3

가

1999

< -7 >

(1999)

( :%)

T V	45	38
T V	24	22
	10	23
	15	10
	6	7

60% 가

TV

20%

2000

165

39.1%,

33%,

16.2%,

4.9%,

5.8%

1%

2000

47

< -8 >

	1998	1999	2000	2001	2002	2003	2004
( )	4,460	4,591	4,704	4,819	4,937	5,058	5,182

: Baskerville Communications.

113

1999

3 2260 , 2000 3 8000

, 2001 4 2560

BskyB

1998 , 105 9,100

1999 15% 가 121 3,600

1995 42 2000 72

. 5 72%가

가 TV 116) , 2.3

가 46%

< -9 >

( : )

	33.00	46.00
TV	19.00	26.00
	16.00	22.00
	2.34	3.00
	0.63	1.00
	0.94	1.00

46%

TV

26%

22%

4%

116) TV 가

가 가  
가

VOD  
가

가  
(subscription)  
TV

TV  
가

가 2010

TV 가

< - 10 >

( : %)

/	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
ITV	4.7	1.4	4.9	6.3	4.9	-8.8	5.1	5.0	2.4	2.4	2.2
4	9.4	4.6	8.1	6.7	8.1	1.9	4.6	5.9	4.6	3.6	3.2
5	-	-	74.4	29.8	11.6	-3.4	7.0	7.5	10.0	4.7	5.7
GMTV	-3.8	-7.8	-1.4	-7.1	3.1	-3.0	3.1	-	1.5	-	-
S4C	-	-	5.9	-3.3	3.4	-	-	-	5.6	-	-
	34.1	32.6	33.8	16.8	17.1	3.6	17.1	16.3	15.0	14.4	12.1
	7.1	7.5	10.2	8.3	7.3	-4.7	6.8	7.0	5.5	5.0	4.6

: Zenith Media

ITV

. 4 5

ITV

. ITV

16 59

4.9%

4가 8.1%,

5가 11.6%,

7.3%

2001

-8.9%

117) ITV

(3)

BBC가

BBC

ITV가

117) Mediaweek, June 2001.p.9.

< - 11 > 10

		1997 1998 1999 (%)			1997 1998 1999 (%)			1997 1998 1999 (%)			
		1997	1998	1999	1997	1998	1999	1997	1998	1999	
	-	9.0	13.9	14.2	1.34	1.27	1.34	6.6	5.4	8.0	8
	1938.1	18.1	17.0	7.9	1.08	1.26	1.11	50.9	51.5	40.3	5
BskyB	1545.0	25.2	18.9	-25.1	1.65	1.70	1.40	-35.7	-26.1	-35.9	11
	998.0	-	-	53.8	0.00	0.00	0.75	-	1009.3	172.4	-
BBC	463.8	2.9	4.8	1.5	1.71	1.65	1.67	30.6	37.2	35.8	7
	385.7	4.6	18.9	9.4	1.02	0.78	1.10	31.3	47.3	53.9	1
TV	364.7	263	28.4	27.3	1.55	1.22	1.95	25.2	13.8	15.7	6
TV	337.3	27.8	26.2	25.4	1.35	0.93	0.90	55.6	22.2	13.8	5
BBC Resources	330.8	-	-2.5	-2.5	-	2.01	2.06	-	170.3	146.0	-
SMG TV	242.7	18.8	22.0	17.4	1.05	1.33	0.95	32.9	66.0	43.1	11
	231.9	12.8	13.1	13.2	2.04	1.96	1.96	103.1	111.7	113.4	6

: The Prospects Shop Ltd., 'Industry Overview: Business ratio report', 2001.

BBC ITV . 4 ITV

118), 5 ITV

118) ITV 4 .

가  
 . 4 1995  
 (operating profit)  
 4 64 . 1 2 8  
 3 ITV 74  
 ITV 4가 가 . 4가  
 ITV가  
 4 . 1993 4가  
 4가 ITV

BBC ITV가

BBC 2000 26 72 , 24 25  
 2 가

< - 12 > BBC (2001 3 31 )  
 ( : )

	2000	2001
	3,003.2	3,164.5
( )	3,023.9	3,192.7
	20.7	28.2
	0.2	0.9
	20.5	27.3
	-	18.2
	20.5	9.1
가	23.4	25.8
	2.9	16.7
	14.8	9.6
	-	0.5
/	11.9	7.6

: BBC, 'Annual Report & Accounts for 2000-2001', 2001.

BBC

< - 13 > BBC (2000)

			Worldwide
( )	23.71	2.05	0.96

: BBC, 'Annual Report and Accounts 2000/ 2001', 2001. p.8

BBC . 1998  
 5 , 1999 8 1 , 2000 8 2 , 2001

9 6 . BBC .  
 1998 1 4 , 1999 2 , 2000 9 ,  
 2001 2 3 .

< - 14 > BBC (2000)

	T V							
( )	13.24	3.65	2.9	1.95	1.44	1.32	1.18	0.52

: BBC, 'Annual Report and Accounts 2000/2001', 2001. p.8

BBC TV 가 ,  
 2 가 . SBS .  
 BBC (minority interest)  
 BBC .  
 . 2000  
 BBC 1 4  
 2 6 .  
 1999 BBC 가 76%가 2000 8  
 . BBC Worldwide  
 .  
 20 가 .  
 BskyB가 15 . ITV 가  
 BBC ,

< - 15 >

	( )		가
	1999	2000	
	693.9	757.5	9.2
	182.6	224.6	23.0
	879.3	982.3	11.7
	635.6	691.5	9.0
schedule	-229.5	-252.1	-10.0
TV	160.0	181.9	14.0

: TV International, Vol,8, No.24, December 11, 2000. p.1.

ITV 가 .  
ITV

< - 16 >

	( )	( )	가
1990	106	121.9	- 1.1
1991	107	113.9	-6.6
1992	122	120.5	5.8
1993	126	151.6	25.8
1994	143	187.1	23.4
1995	170	230.0	22.9
1996	176	262.4	14.1
1997	188	300.7	14.6
1998	220	352.0	17.1
1999	242	395.0	12.2

가 . FM, AM,  
. 1999 242

가 2001 가 3 253  
가 가 가

. 1999

(Radio Authority)

Digital One

28 (digital multiplexes)가 .

(4) TV

TV

TV 가

1999 TV

39 .119)

1980

2000 가 가

가 2001 DTH/SMATV 가

545 , 349 가 900 .

가

---

119) TV  
BskyB

가 7-10 ,

. ITV

34

, 9-14.99 .

< - 17 > 가

( : 가 )

	DTH/ SMATV		
1992	1,893	409	2,302
1993	2,387	625	3,012
1994	2,754	744	3,498
1995	3,060	973	4,033
1996	3,542	1,399	4,941
1997	3,804	1,945	5,649
1998	4,117	2,471	6,588
1999	4,114	2,911	7,126
2000	4,196	3,352	7,618
2001	5,450	3,490	9,010

) 1 . DTH가 / 가 (%)

: BARB

가 가 1999 가  
 가 가 10% 가  
 가 2000 2.1% .  
 , , 가 9 6  
 67.7% 650 .

< - 18 > 가 (2000.12 )

( ; )

	Sky		ITV Digital	
	0.5	2.6	-	3.1
	4.6	0.9	1	6.5

: ITC

BskyB 2001 550 가 1 . Bsk  
 TV 가 .

, 가 BBC  
4-5 .

< - 19 > TV

( : )

			+	+	+	
					+	
NTL	40	120	324	360	396	468
ITV Digital		84	264	264	324	396
Sky Digital	40	84	324	324	384	384
Telewest	20	108	288	288	348	504

: ITC, 'ITC Annual Report and Accounts 2000', 2001.

TV 가

TV

BskyB 10 4  
. 2 ITV Digital 가 NTL  
1 가 2  
가 2001 114 가

< - 20 > BskyB (1999)

( : )

	( )		( )
	249.7(63.9)		193.0(52.9)
CATV	68.6(17.5)		75.3(20.7)
	51.0(13.0)	가	45.4(12.5)
	21.8(5.6)		25.9( 7.1)
-	-		25.0( 6.9)
	391.1		364.6

: BskyB

Bsky 1999 3 . 가 가가

< -21> BskyB (2000)

( : )

	( )		( )
	343.0(67.3)		258.8(49.9)
CATV ,	72.2(14.2)		78.1(15.1)
		가	47.5( 9.2)
	60.5(11.9)	Open	55.4(10.7)
Open	9.9(1.9)		11.0( 2.1)
	4.0(0.8)		36.9( 7.1)
	20.0(3.9)		31.2( 6.0)
	509.7		518.9

: BskyB

BskyB 1

1 , , , Open

< -22> BskyB

( : )

	2000.6	2001.6	2002.6	2003.6	2004.6	2005.5
Open	4.7	82.3	121.0	166.5	216.8	262.3
/	0.0	10.3	115.4	170.5	227.3	283.7

: Merrill Lynch

6 75%

BskyB 530 가

. BskyB 가

1 가 , 100

2)

BBC, , BskyB, Flextech가

5 , TV BskyB, NTL

Telewest,<sup>120)</sup> ITV Digital SDN '5 '(Five Gatekeepers)

(1)

ITC Schedule 2 Part II

ITC가

1

30% . ITV GMTV , 16

28.2%

0.2%

81 42 가 0.2%

1%

120) Telewest NTL

. Telewest ,  
. NTL Cwc가 3

, 8

&lt; -23&gt;

(2000.7-2001.6)

BBC1	26.6	BBC Choice	0.4	The Paramount Channel	0.2
BBC2	10.9	Disney Channel	0.4	QVC	0.2
Channel 4	9.9	Sky Moviemax	0.4	Animal Planet	0.1
Channel 5	5.6	UK Style	0.3	Channel Television	0.1
Central	4.2	The Box	0.3	Granada Breeze	0.1
Granada Television	3.4	S4C Wales	0.3	Granada Men & Motors	0.1
Yorkshire	3	The Sci-Fi Channel	0.3	Disney Playhouse	0.1
Carlton	2.5	Challenge TV	0.3	Hallmark	0.1
HTV	2.1	MTV	0.3	ITV2	0.1
Meridian	2.1	Discovery	0.3	Kiss TV	0.1
LWT	1.9	Granada Plus	0.3	MTV Base	0.1
Anglia	1.8	Eurosport	0.3	MTV Extra	0.1
Sky One	1.8	Trouble	0.2	National Geographic	0.1
Scottish	1.8	VH-1	0.2	Network 2	0.1
GMTV	1.4	Sky Cinema	0.2	RTE1	0.1
Tyne Tees	1.4	Sky Premier 2	0.2	Sky Cinema 2	0.1
UK Gold	1.2	Sky Premier 3	0.2	Sky Moviemax 2	0.1
Sky Sports 1	0.9	Sky Premier 4	0.2	Sky Moviemax 3	0.1
Westcountry	0.8	Sky Sports 3	0.2	Sky Moviemax 4	0.1
Ulster	0.8	The History Channel	0.2	Sky Moviemax 5	0.1
Cartoon Network	0.7	BBC News	0.2	Sky Premier Widescreen	0.1
Nickelodeon	0.7	Boomerang	0.2	Sky Sports Extra	0.1
Sky Premier	0.6	Bravo	0.2	Sky Sports News	0.1
Border	0.5	Discovery Home & Leisure	0.2	TCM	0.1
Grampian	0.5	E4	0.2	UK Horizons	0.1
Sky Sports 2	0.5	Fox Kids Network	0.2	UK Play	0.1
Living	0.5	Nick Jr	0.2	VH-1 Classic	0.1

: ITC, "Television audience share figures", 2 August 2001.

'0.1%

< -24>

< -24> 가

( :%)

	BBC1	BBC2	ITV	4	5	
가	34	13	34	13	6	-
DTH 가	24	7	27	8	5	29
가	22	7	22	7	4	38
DTH 가	20	5	21	6	2	46

: BARB

가

DTH 가 가

1999 14.0% 2000 16.6%

< -25>

(1991-2000)

( :%)

	BBC1	BBC2	ITV	4	5	
1991	34	10	42	10	-	4
1992	34	10	41	11	-	5
1993	32.7	10.3	39.9	11.0	-	6.1
1994	32.4	10.6	39.5	10.8	-	6.8
1995	32.2	11.2	37.2	11.0	-	8.5
1996	32.5	11.6	35.1	10.8	-	10.1
1997	30.8	11.6	32.9	10.6	2.3	11.8
1998	29.5	11.3	31.7	10.3	4.3	12.9
1999	28.4	10.8	31.2	10.3	5.4	14.0
2000	27.2	10.8	29.3	10.5	5.7	16.6

( ) ITV GMTV  
 , RTE Ulster  
 : BARB

ITV . ITV 15 가  
 BskyB  
 ITV  
 BBC ,

< -26>

(2000)

	BBC1	ITV	BBC2	4	5	
(%)	26.8	28.9	11	10.3	5.7	17.3

: BARB

BARB<sup>121)</sup>가 2000 BBC1 26.8%,

121) 가

BBC2가 11.0% . ITV가 28.9%, 4가 10.3%, 5가 5.7%,  
 가 17.3% . BBC 2 37.8% . 1999 39.1%  
 0.9% . BBC 0.4% .  
 2000 BBC2  
 11% . ‘ ; ‘ 가  
 . ‘ , , 2001 가  
 . , , 가 가 .  
 1970 1980 ‘ 가 ,  
 ,  
 BBC2 .  
 BBC 가 가

< -27> (1999/2000)

	(%)
BBC Radio 1	10.9/ 10.6
BBC Radio 2	12.0/ 12.6
BBC Radio 3	1.2/ 1.2
BBC Radio 4	10.2/ 10.4
BBC Radio Five Live	4.1/ 3.9
BBC	10.3/ 11.0
	48.7/ 49.7
Virgin	2.1/ 1.6
Classic FM	4.0/ 4.2
TalkSport	1.5/ 1.4
	40.8/ 40.4
	100.0/ 100.0

: ITC

128

5 BBC 48.7%  
1.0%

(2)

가

가

< -28 > (2000 )

			4	BskyB	5	MTV	Flextech		
(%)	33	28	19	7	6	2	2	3	100

가 33% , 28% 2

ITV 61%

가 19% 3 , BskyB가 7% 4

(3) TV

TV BskyB, NTL, Telewest, ITV Digital . BskyB

, NTL Telewest TV, ITV Digital

. 가 BskyB가 82%, ITV Digital 12%, Telewe

NTL 6%

< -29 >

		(%)	가
Sky Digital	1998.10( ) BskyB (1989.2)	(37.6)	가
		SA(23.1)	(360 )
		BSB (11.8)	가
		(3.2)	(93 )
ITV Digital	1998.11	(50)	가
		(50)	(77.4 )
NTL	1999.6	(24)	가
		& (10)	(23 )
		(10)	가 (216 )
		(5)	
Telewest	1999.11	(29.9)	가
		(21.6)	(15 )
		(10.9)	가 (112 )

: IDATE, TV International.

ITV Digital

NTL Telewest

NTL Telewest

1 가 . NTL

2001 가 120

NTL Telewest , 가 ,

(operational merger) .122)

? 가

122) Financial Times, August 8 2001.

가  
 BskyB가 가 NTL  
 가  
 NTL Telewest  
 TV  
 1993 6.1% 1999 14.0%

< -30> TV

	1993	1994	1995	1996	1997	1998	1999
(%)	6.1	6.8	8.5	10.2	11.8	12.9	14

: BARB, Zenith.

가

TV 6-7  
 BskyB 50% 2000 1/4  
 BskyB 가 57% ITV Digital 36%, 7%  
 4/4 52%, 27%, 21% , 2001 1/4  
 BskyB가 52%, ITV Digital 18%, 30%

123) ,“NTL

”, < 21>, 2001.9. p132-133

.<sup>124)</sup> BskyB 50% 가 . ITV Digital

BskyB가 Sky 50%  
Sky One 46%

< -31> (2000 )

( :%)

	Sky One	Discovery	BBC Choice	E4	Sky News	BBC News24	ITV News	BBC Knowledge	ITV2
1999	49.6	14.6	17.4	-	11.9	7.2	5	2	1
2000	46	22.9	18.4	13.7	8.6	7	5.2	3	2.5

: BARB

BskyB TV 50%  
72%, 65%, 90%,  
100% . BskyB Sky One 46  
Sky News 13.7% . 59.7% . Bsky

(market power)

. ITV Digital

BskyB가

. ITC  
2001 1 1 TV가 356 2,197가 TV 가  
14.7% . TV가 TV 가 90 1.37

124) Lehman Brothers

132

3)

(1) TV<sup>125)</sup>

가 가

< -32> 가 가

가	가	
	2000	2005
	6,400	19,500
	3,165	10,415
	2,250	9,150
	2,030	15,700
	1,900	4,924
	510	4,600
	250	3,081
	195	4,000
	16,700	71,371

( ) Informa Media Group

2000 가 38.3%

.126)

BskyB ITV Digital

125) DVB-T

TV(HDTV)가  
가

8-VSB  
가

TV

126) 2005

가 7

가

< -33> BskyB ITV Digital

	BskyB	ITV Digital
	News Corp.(40%)	(50%)
	(24.5%)	(50%)
	Videoguard	Mediaguard
	NDS( , News Corp가 )	-
		가
가	,	,

BskyB 가  
 ITV Digital 50%  
 .<sup>127)</sup> ITV Digital BskyB  
 . BskyB가 ITV Digital  
 . ITV Digital 가 . ITV Digital  
 Digital 가  
 . 가 가  
 . BskyB TV 가  
 (CAS) NDS . BskyB ITV Digital  
 .  
 2001 ITV Digital 가 110 가 170 가  
 . 가  
 ITV Digital가 가 . 가  
 \_\_\_\_\_  
 127) ITV Digital ONdigital ITV

(churn rate)<sup>128)</sup> . 2000 22% .  
 BskyB 8% . ITV Digital BskyB 가  
 . ITV Digital BskyB ,  
 BskyB 가  
 ITV Digital  
 .<sup>129)</sup> .  
 Sky Digital Videoguard (CAS)  
 ITV Digital MediaGuard .  
 ITV Digital 가 가  
 가 가 .<sup>130)</sup>  
 , ITV  
 Digital .  
 . BskyB 가 Sk  
 Digibox Sky+ 60  
 . Sky+ 40 가 20 .  
 가

---

128) 가 가 가 , 가

129) Matt Wells & David Teather, "Is digital a dead dog?", <Mediaguardian>, July 2, 2001.

130) New Media Markets, July 6, 2001. p.5.

< -34> 가 (2000)

	( )	(%)
PPV	20.8	23
	2.0	17
	1.7	14
PPV	1.4	11
playercam	1.2	10
	1.2	9
fanzine	0.7	6
	0.5	4
	0.4	4
	0.3	2
	0.1	2
	6.3	51

: Continental Research Report, , 2001-04 . p.14.

가 가  
 가 , ,  
 , 가  
 . BskyB 가 ‘  
 , . BskyB 13- 15%

ITV Digital 11 5

(2) TV  
 TV 가 TV

'Broadcasting & Cable'

TV ,131)

, TV .  
 , TV가 .  
 TV(enhanced television)' TV가 .  
 , EPGs VOD .  
 , , VCR  
 가 . TV  
 가 가 .  
 TV .  
 . NTL .

< -35> NTL

	(%)
Bargainholidays.com	
The Sporting Life( )	
ITN ( , , )	
TBA	
beeb.com(Top Gear, Top of the Pops, Radio Times), Flextech Interactive(SceneOne), EMAP(Q and Empire) IMDb.com( ) Ticketmaster.	
Tesco( ) alphabetstreet.com( ) audiostreet.com( CD ) unbeatable.co.uk.( , , )	

: NTL. Inside TV, April 5, 1999.p.7.

BBC 2001 . BskyB 가  
 BBC가 5 1 , 5

131) Broadcasting & Cable, 7-9-01, p.34.

.<sup>132)</sup> BskyB Open  
 Trivial Pursuit 110 가 , 90  
 가 . 가 . 140 가 가  
 7 , 17 . 27 가  
 Open 35%  
 TV 가 . TV(Interactive TV, iTV)

< -36> TV

	가 , (pay-per-play), , , t-commerce
EPG	
,	,
TV	t-commerce
(classified)	

: Informa Media Group.

가 BskyB . Open  
 BskyB  
 . Open  
 '(walled garden) . 가  
 BskyB가 .  
 BskyB 가 10% Open  
 가 .

<sup>132)</sup> , 2001.8. p 123

Open  
 . Open ‘ ’ 가  
 , ,  
 .133) BBC 2001  
 가  
 가 BskyB  
 . BskyB 2000 7  
 12 3 3 . 2001 5  
 가 가  
 . 2000 가  
 가 가 ,

3.

1)

(1) ITV

ITV 16 가 ITC 가 , .134) 14  
 , 1 GMTV .  
 2 가 가 .

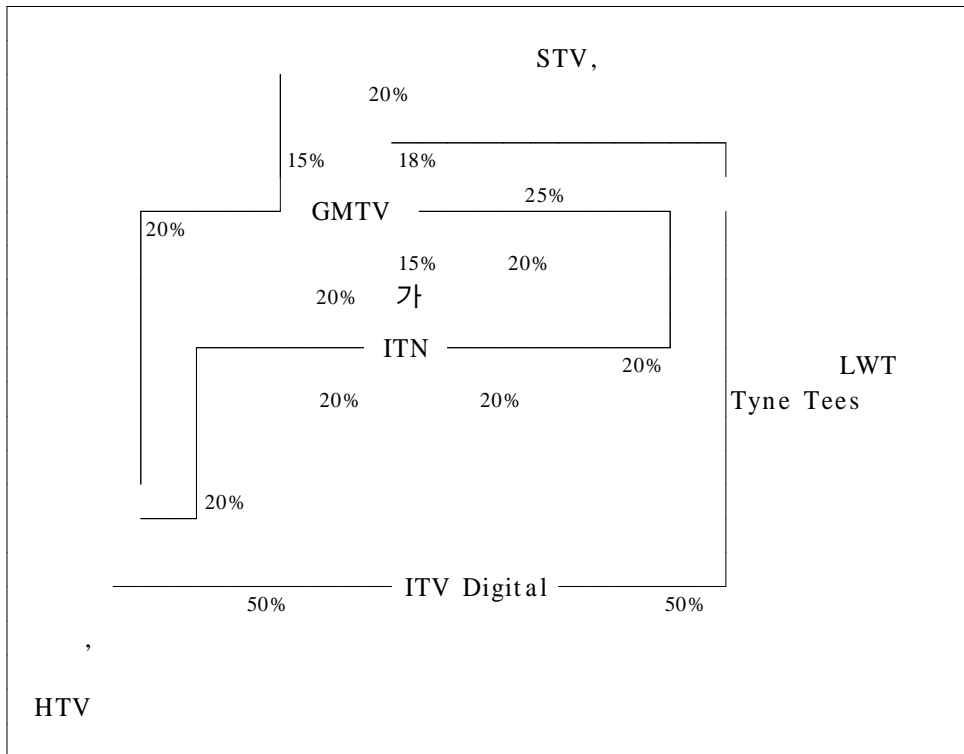
---

133) <The Economist>, May 26th 2001, p.71.

134) ITV 15 가 ITC 가 . ITV  
 (ITV Network Centre) , (commissions),

가 . ITC, <The Independent Television Commission: Fact  
 file 2001>, p.17.

< - 37 > ITV



: Zenithmedia.

가 ITV 가 가  
 . ITV 가 . ITV  
 . ITV 2000 7

(United News and Media)가<sup>135)</sup>

가 2001

135) 5 35.4%

, , BskyB TV  
 , 가  
 , ITV (ITV Network) GMTV 15  
 , 가  
 , ITV Digital 가가  
 가  
 .<sup>136)</sup> ITV  
 . ITV  
 ,  
 .  
 .  
 ITV  
 .  
 . Howells ITV  
 . United News and Media  
 . (Competition  
 Commission)  
 가  
 .<sup>137)</sup>  
 가 2000 가  
 가  
 .  
 , BskyB

---

136) 15% 가  
 20%

137) The Guardian, June 28 2001. p.21.

가 . ITV  
 ITN ITV 가  
 .  
 BBC 가 ITV 가  
 ITV가 BBC 가  
 가 . BBC 가  
 ITV  
 CEO  
 .138) 가 .  
 ITV . Wedel

(2)

TV가 Audiofina  
 가 . TV CLT-Ufa  
 TV 가 TV  
 Talkback Productions . BskyB  
 .139) BskyB  
 ITV 10 ITN (Independent  
 Television News) 140) . BskyB

---

138) BT  
 139) BskyB 2001 가  
 Movies.com , , 가  
 (distribution window) Movies.  
 com , , MGM, 가  
 . <The Asian Wall Street Journal>, September  
 7, 2001.  
 140) (ITC) ITV

4 20% 3  
 , ITV .141)

< -38> (1999-2000 )

BskyB	Chelsea FC DirecTV PerfecTV Kirch PayTV , Open TV ( 가:7 6 ) Sports Internet ( 가:4 4 3 ) TiVo
NTL	Bredbandsbolaget( , 가:3 1 6 50:50 ADSL
	United News&Media TV ( 가:26 ) Seven Network( ) ( 가:8 8 ) Border TV 가 (7 5 ) TV3 ( , 가1 870 )
Warburg ( )	5
	Carlton Interactive ITV Interactive HTV ( , 가:1 5 ) Action Time Planet24
SMG	Ginger
	CLT-UFA, Audiofina( TV ) Talkback Productions Dorling Kindersleyd ( 가:4 5 3 ) NatComp System ( , 가:23 )
Scotish	Ginger ( 가:3 6 )
Capital Radio	Border TV
Intermedia	BoxTV

: Television Business International, January/February 2001. p.38-41 ,  
 Broadcast, .

, 가 . 가

가 . 2003 2008 ITV

141) 3 BskyB, CBS , TV  
 Chrysalis .

ITV

가

2)

BBC 가

가 . BBC  
가 . 2

2

BBC BBC

. BBC

BBC

(BBC Resource), BBC

(BBC Technology)

가

GCSE

BBC

. GCSE

.<sup>142)</sup> BBC

TV

3sixmedia

. BBC

142) Broadcast, 6 April 2001, p.5.

144

3)

가 25% . 1999  
 29%  
 . (acquired programme) 143) 2000  
 가 48%,  
 44%, 8% . 가 가 가

< -39 >

( :%)

					( )
( )	18	20	3	17	41
( )	16	28	5	15	36

: DGA

44%

---

143)

가

< -40>

( :%)

( )	44	47	8	8
( )	33	56	11	11

: DGA

1999 가 33%, 가 11% 56%

가 50%

가

. 563

12

가 80% 4

2%

가

가

< -41>

가

(2000)

	90,656		16,999
	67,499		14,047
	43,700		2,933
	36,104		2,498
	35,235		424
	25,598	-	-
	20,372		319,164

)BBC , : ITC

가

TV<sup>144)</sup> 가 < -41>  
 TV 4 9

< -42> 5 (1999)

		( )
1	TV	490
2	CLT-Ufa	460
3		430
4		400
5	+ ( )	230

: TV International, May 1, 2000. p.1

가 TV

TV

(One-source Multi- use)

TV

9 5 1  
 2

144)

가 TV,  
 RTL 22%

< -43> (1999)

가	( )	(%)
	1,052	46
	905	38
	435	87
	249	82
	199	88

: Eurofiction

가  
46%, 38%, 80%  
가

< -44> (1999 )

	가 ( )	(%)
BBC	209,908	23.2
	209,667	23.2
	90,155	9.9
Mersey	79,990	8.8
	49,394	5.5

) : European Audiovisual Observatory. 2000. p.7.

가 62.1%, 가 37.9%  
 , 가 가 53.5%,  
 가 46.5% . 17.8%, 82.2%, 가 13.4%, 86.6%,  
 12.4%, 87.6% .145) 가  
 , , 가  
 .  
 가 . 1999 BBC  
 16.11 가 . ITV 8 7 , BskyB가  
 3 7 2, 3 . 4 4 , 5가 1  
 , GMTV가 3 2 . BBC  
 7 9 13 가

< -45> BBC (2000) ( : )

		1999	2000
TV	BBC1	130.6	132.3
	BBC2	88.1	91.4
	BBC Choice	14.3	52.4
	BBC Knowledge	6.7	62.7
	BBC News 24	5.0	5.1
	BBC Parliament	0.5	0.5
		87	89
		110	120
		55	54
		119	118
		47	47

145) . p.9.

< -45>

		209	183
		90	102
		88	90
		528	486
		106	110
		101	102
	Radio1	2.9	3.1
	Radio2	3.2	3.3
	Radio3	4.1	4.0
	Radio4	9.3	9.6
	Radio Five Live	5.8	6.2

: BBC, 'BBC Report and Accounts 2000/2001', p.84.

BBC 가

가

4)

BBC ITV가

. BskyB, ITV Digit

Eurosport가 ,

< -46 >

BBC	FA UEFA	Stella Artois Boumemmouth Eastbourne National Champs, Battersea Guardian Direct Indoor		Ryder ( )  Volvo PGA World Match B&H  Loch Lomond US Master Women's Open World Stroke- Play		& 6 7	British Toruing- Car World Super- bike	( ),  Great North Run AAA  Indoor- International
BskyB	FA ,     Copa  La Liga( )	ARAG ATP	Triangular National County	Ryder  US PGA US PGA -  Waler Curtis  -	Super All UK  ( )	-  -  -  Hone Netions Tour	-  World &  -	IAAF
4								
5	FIFA			US PGA ( )			MOTO GP	
	UEFA ( ) 21 Toulon	( ) Sanex WTA, ATP Tour					World Super- bikes MOTO GP -  NASCAR ( ) Formula 3000 US & Euro- Men's ( ) World Rally- ( ) ( )	World ( , 2001) IAAF -
ITV	Nationwide Divisions 123 Worthington Cup UEFA Champions League						Formula	
ITV Digital	Worthington Cup UEFA Champions League	Men's ATP Masters						

BskyB가 TV BskyB BBC

2000 가 BskyB  
BskyB가 . BskyB 2003-2004  
3 11

가 OFT  
(Restrictive Practices Court) BskyB가 11

BskyB .146)

---

146) 가 가 가 4

가  
(Murdoch Effect)

< -47>

	( )		
Sky Sports	11.1	2003/4 3	66
NTL	3.28	2003/4	40 PPV
ITV	1.83		

가 ITV  
 . TV가  
 . ITV , .  
 1 83 ,147)  
 TV  
 . 가  
 1996 , , ,  
 . 1998 , TV  
 .  
 5)  
 1980 .  
 , , .  
 .  
 , .  
 6 가<sup>148)</sup> .

147) Marqusee, M., "Cashing in on sport", CPBF. Free Press 117, August/September 2000. p.3  
 148) 6 AOL- ( 318 ), (234), (163 ), Viacom(128 ), (135), 가 160 , TV

가

가

‘가’

10

< -48 >

10

1		News Corporation	, , ,
2			
3		BBC	
4( )		AOL-Time Warner	, ,
4( )		AOL-Time Warner	,
5		WPP	,
6			
7		BskyB	
8			
9			
10			

: Mediaguardian, Monday July 16 2001.

4 가

11

BskyB

10

ITV

6

. BBC

3

, 9

가

< -49 >

( : , : 2000 )

	가			(%)
AOL	230,475	36,213	-3,927	
	66,084	25,402	1,149	1.7
	369,102	22,956	9,421	24.1
	102,723	20,044	-364	
	70,499	35,427	1,949	12.2
News Corp.	38,331	11,376	638	4.6
	18,898	8,589	145	0.2
	14,831	5,503	330	6.3
	20,002	5,103	756	49.2
BskyB	18,846	2,624	-215	
	6,666	1,544	294	16.3
Telewest	4,951	1,533	-1,003	

: Business Week, July 2001. p.60-62, p.68-69.

, AOL

가 AOL , , Canal , ,  
 , , ,  
 . 가 BBC,  
 , BskyB New  
 Corp.가  
 , BBC  
 .  
 BBC  
 . BBC가  
 . 2000  
 BBC TH Global Internet Managers BBC Worldser  
 13.5% . BBC

&lt; - 50 &gt;

	가	
News Corp.		BskyB(40%), Music Choice Europe(49%), QVC(20%), Nickelodeon U.K.(50%) The History Channel(50%), Sky Scottish(50%), Paramount Channel(25%) Granada Sky Broadcasting(40%), National Geographic Channel UK (50%) Sky Multi-Channels, Sky One, Sky News, Sky Soap, Sky Movies, Sky Sports, Sky Movies Gold, Sky Sports 2, Sky Sports 3, Sky Travel Granada Plus, Granada Talk TV, Granada Men & Motors Granada TV High Street, Granada Food and Wine Granada Health & Beauty, Granada Home & Garden The Computer Channel, Fox Kids, Premium Channels, The Movie Channel
		NTL, Telewest
		5
		Disney Channel
		BskyB(24.5%), SciFi
Foxtel		UKTV
TH Global Internet Manager		BBC Worldservice(13.5%)
		Nickeloden U.K.

BskyB

156

6)

가 ITV , BBC ,  
 1990 .  
 10 20 ,149)

< -51 >

( : )

	1993	1994	1995	1996	1997	1998	1999	2000
	181	255	245	234	313	444	440	218
	269	317	400	516	606	692	843	
	-87	-62	-155	-282	-293	-248	-403	

: 가 (ONS)

1990 .  
 가 1990 가 1999 8 4 3  
 가 4 4  
 가 4 TV (finished tv shows)  
 가 1999 2 45  
 2000 11% 2 18 ,150)

149)

가

가

가

가

가 , 가,

151)

가

4.

1)

가

가

가

가

< -52 >

( : )

	BBC1	BBC2	ITV	C4	C5	Sky 1	UK Gold		
1994	1.17	0.38	1.42	0.39	-	0.03	0.02	0.19	3.60
1995	1.16	0.43	1.34	0.39	-	0.03	0.02	0.26	3.60
1996	1.17	0.42	1.26	0.39	-	0.04	0.02	0.30	3.60
1997	1.11	0.42	1.18	0.38	0.08	0.04	0.02	0.36	3.59
1998	1.07	0.41	1.14	0.37	0.16	0.05	0.02	0.39	3.61
1999	1.04	0.39	1.14	0.38	0.20	0.05	0.03	0.43	3.65
2000	1.00	0.40	1.08	0.39	0.21	0.05	0.03	0.51	3.68

: BARB

150)

9%

2

151)

35%가

가

Sky1 UK Gold

가

2)

가

가

가

가

가

가

.152)

2000

가

BBC1

ITV가

1

'(Coronation Street)

가

59%

. BBC

'EastEnders'

. 'EastEnders'

가

30

152)

Shu-Chu Sarrina Li

. Shu-Chu Sarrina Li & Chin-Chih Chiang, "Market Competition and Programming Diversity:A Study on the TV Market in Taiwan", *The Journal of Media Economics*, 14(2), 2001. p.105- 119.

## &lt; -53&gt; BBC 1

		( )
1	East Enders	18.01
2	Euro 2000 : England v Rumania	14.56
3	One Foot in the Grave	12.84
4	Comic Relief 2001	11.47
5	The Weakest Link	11.40
6	I don't Believe It	11.25
7	Film :Deep Impact	11.25
8	Film :Men in Black	10.69
9	Casualty	10.40
10	Antiques Roadshow	10.14

: BBC, 'Annual Report & Accounts for 2000-2001', 2001.

BBC1 , , , , BBC 2

,

## &lt; -54&gt; BBC2

		( )
1	The Weakest Link :Celebrity Special	6.59
2	Have I Got News For You	5.77
3	World Snooker Final	5.76
4	The Weakest Link	5.54
5	Have I Got Buzzcocks All Over	5.47
6	The Simpsons	5.41
7	Congo	5.10
8	Horizon	5.09
9	The Simpsons :America's First Family	4.74
10	Journeys to the Bottom of the Sea	4.68

: BBC, 'Annual Report & Accounts for 2000-2001', 2001.

2000 . BBC  
 ' (The Weakest Link) ITV가 ' (Who  
 wants to be a millionaires) . ' BBC2  
 가 5 가 BBC2  
 BBC1 . 'The Weakest Link' 가 .  
 가 9 . 9  
 가 1  
 가  
 2 가 .  
 가 .  
 9 .  
 ' 가 BBC .  
 ' .  
 BBC 500 가 .  
 '153) ITV .  
 15 가 가 .  
 가 가 2  
 가 . ITV 가 .  
 가 900  
 154) .

3)

2000 ,

---

153) 가  
 154) , “ , TV가 ”, 21, 2000.12, pp.130- 133

가

가  
가

가 , 가

가

가  
가

가

가 . 가 .

•

1.

1)

. 2000 8

가

(1)

1

가

가

가 가 ,

. 2 1 “

“ ” ,

“ .

(2)

. 25 “CSA

가

.” .

2)

(1)

가.

- 49% .

- 4 가

가 .

- 4가 : ,

• 49% .

• 5 .

• .

165

• , 6

: 6 가  
TV 가

- 400 가

TV  
- 6 가 TV  
TV

- 2가  
, CSA ,

:

• 400 가

• 300 가 가

• 600 ( distributeur) 가

• 가 12  
20%

(2)

가.

1986 9 30 27 70 :

- : 1990 1 17 90-66 ( ) —  
 1991 8 29 , 1991 12 26 , 1992 3 27  
 1990 1 17 90-67 ( ) — 1992 3 27 ,  
 11 6

- pay : 1995 5 9 95-668

- TV : 1992 9 1 92-882 ( 1995 1 24 )

90-66 ( )

- ' ,

- TV 19 ( ) .
- 

- ' ,

- : , , , , 가 ,

(EOF)' 40%, 60% 1986 9 30  
 27 1992 1 18 .  
 TF1, 1996 Canal+

- France 2, France 3, TF1 : 18 -23 14 -23 .
- Canal + : 20 30 22 30 .

1992 1 18

(des heures d'écoute significatives)

(CSA) ( ,

, ) .

1998 1997 M6

17 23 14

23 .

TF1 TF1 , ,

France2

TF1

< - 1> 1996

		France2	France3	La 5ème	TF 1	M6	Canal+
	' '	47.4%	45.1%	61.3%	55.4%	46.3%	54.9%
		70.0%	62.1%	79.8%	63.4%	62.3%	73.8%
	' '	54.9%	58.4%	- *	53.4%	42%**	45.6%
		71.0%	82.8%	-	61%	60.2%**	76%

\* 가 La 5ème

\*\*

( ) .

20 30 22 30

1987 1 26 87-36

France2 France3

-  
-  
-

TV

192 104

20 30 22 30

TF1 가 , TF1 (1986 )

170

TF1 1996 7

192

1994 9 27 가 52

-  
-  
-  
-  
-  
-

(30 )

3

( )

:

(

가 -Ciné club - 22 30

), , 20 30

:

3

TV

가

2

가

18

< -2> TF1

		2000		1999	
1.					
	가	192	192	192	192
	20:30 ~ 22:30	104	103	103	103
	( )	60%	60.4%	60.4%	60.4%
	EOF ( )	40%	47.9%	52.1%	52.1%
	(20:30 ~ 22:30)				
	( )	60%	60.2%	60.2%	60.2%
	EOF ( )	40%	50.5%	52.4%	52.4%
	( )	60%	63.7%	63.4%	63.4%
	EOF ( )	40%	51.6%	51.8%	51.8%
	(18~23 , 14~23 )				
	( )	60%	71.3%	68.4%	68.4%
	EOF ( )	40%	60%	60.8%	60.8%
	120 , EOF				
			143 51	145 49	
			854 8	845 37	
	1000		1308 44	1587 40	
	50		51 29	50 53	

: CSA

CSA가 가 , CSA가 2000

가

TF 1

TF 1

TF 1

CSA

TF1  
143 51

TF1

Canal +  
Canal+ 1  
Pay 1995 5 9 95-668 19  
6 1 :  
-  
-  
- 365 ,  
120  
- 3 6 .  
7 가 .  
- : 13 21 , 18 21 ,  
23 , 13 18  
Canal+ .

TV  
TV 20 30  
22 30 144  
( CinéCinéma, CinéCin  
Cinéstar, Cinétoile) Canal+ .  
416 2 8  
. 18 21 , 15 23  
13 18 ( ) .  
(CinéCinéfil Cinétoile )  
15 23 , 14 18 ( )  
) .

< -3 >

(1998 12 )

		RFO	Canal +
	· 192 · 52 가 가	· 192 · 19 30 52 가 가	· 365 · 120
	· 20 30 22 30 104 ( 144 )	· 19 30 21 30 144	-
TV	· 3 · 2	· 3 · 2	· 1
	· ( 22 30 "Ciné-club" ) · · 20 30	· (21 30 "Ciné-club" ) · · 19 30	· 13 - 21 · 18 - 21 · 13 - 23 · 13 - 18
	· 60% · EOF 40% (20 30 -22 30 )	· 60% · EOF 40% (19 30 -21 30 )	· 60% · EOF 40% (18 -2 )

: CNC

Canal+ 20%  
 — 20% 가 14% ‘ (EOF)’  
 — 가 .  
 가 가 가 가 120  
 , , 21% 17%  
 1 (Multivision  
 Kiosque) 500  
 CNC  
 가

1999 TV

&lt; -4&gt; 1999 TV ( )

				EOF	
		(%)	(%)	(%)	(%)
CHASSE ET PECHE	6,674	56	71	35	45
COMEDIE !	5,582	50	77	30	68
DISNEY CHANNEL	7,853	54	58	35	40
ENCYCLOPEDIA	6,805	56	71	35	35
ESCALES	6,332	56	74	35	35
FESTIVAL	4,965	60	91	40	89
FORUM PLANETE	4,830	50	95	37	88
FOX KIDS	5,011	50	52	40	46
FUN TV	6,564	54	77	40	52
Histoire	3,393	60	94	40	61
LA CHAINE HISTOIRE	6,137	50	62	30	31
M6 MUSIC	8,117	50	70	40	40
MCM EUROMUSIQUE	6,952	60	63	40	40
MEZZO	6,359	50	96	30	35
MUSIQUE CLASSIQUE	7,639	56	97	35	39
MUZZIK	7,740	60	76	40	46
ODYSSEE	5,168	54	76	35	44
PARIS PREMIERE	4,393	60	85	40	63
PLANETE	6,422	60	76	40	40
SEASONS	4,161	50	80	30	61
TELETOON	4,928	53	61	40	44
TEVA	6,509	55	55	40	40
TV5	-	60	95	40	100
VOYAGE	4,195	60	79	40	43

				EOF	
		(%)	(%)	(%)	(%)
CINE CLASSICS	1,263	60	89	40	89
CINETOILE	727	56	61	35	49
RIRE	1,566	56	76	35	65
XXL	1,313	56	79	35	76

				E O F	
		(%)	(%)	(%)	(%)
AB MOTEURS	3,782	56	71	35	33
ANIMAUX	6,858	56	67	35	32
CANAL J	4,907	60	51	40	40
RFM LA TELE	2,813	60	75	40	38

				E O F	
		(%)	(%)	(%)	(%)
CINE CINEMAS 1-2-3	1,796	60	61	40	38
CINESTAR 1	1,655	56	44	35	44
CINESTAR 2	1,507	56	40	35	39

				E O F	
		(%)	(%)	(%)	(%)
MULTIVISION	8,303	60	51	40	40

				E O F	
		(%)	(%)	(%)	(%)
AB 1	5,239	60	24	40	17
CANAL JIMMY	6,021	60	56	40	29
MANGAS	6,561	56	33	35	31
SERIE CLUB	7,443	60	59	40	39
13EME RUE	6,350	54	18	35	13

				E O F	
		(%)	(%)	(%)	(%)
ACTION	1,128	56	18	35	11
CINE PALACE	1,282	56	51	35	32
POLAR	1,438	56	16	35	10
ROMANCE	1,438	56	35	35	26

		E O F			
		(%)	(%)	(%)	(%)
KIOSQUE	22,014	60	46	40	28

: CSA

(3)

1990 1 17 90-67 ( 1992 3 27 1995 11  
 ) 9 9-1  
 15% ‘ (E O F  
 — 20 21  
 — ‘ , 120  
 . 15%  
 ( )  
 ( ) . (CSA)  
 , , 120

France2 France3 1990 1 17  
 1998 5 8 . France2 Fran  
 17% ‘ ,  
 France2 France3  
 ‘ , 24 120

&lt; -5&gt;

	( )	( )	( )	
Maigret	112,000	10	1.44	6.9
Navarro	88,888	8	0.86	9.34
Football	41,666	5	3.33	1.5
Formule	33,333	4	0.57	6.9
Stars 90	38,888	3.5	0.46	7.6
Sacree Soiree	33,333	3	0.41	7.2
Les Marches de la gloire	27,777	2.5	0.3	8.15
Ushuania	18,333	1.1	0.31	3.4
Thalassa	13,333	0.85	0.2	3.8
Envoye special	9,444	0.85	0.17	4.7
Bas les masques	13,333	0.8	0.31	2.53
24 Heures	10,500	0.63	7.66	0.822
Ex-libris	5,000	0.45	0.34	1.29
7 sur 7	6,666	0.4	0.07	5.4
Bouillon de culture	3,888	0.35	0.35	0.994
L'Heure de verite	4,000	0.24	0.13	1.7
Les Guignols de l'info	32,000	0.16	0.1	1.59
Le juste Prix	4,666	0.14	0.02	5.96
Le Bebete Show	20,000	0.1	0.01	6.61
Questions pour un champion	3,333	0.1	0.2	0.497

: Quid 2001

TF1 M6 (1996 7 31 )

- TF1 :

- M6 : M6 20%  
(20% 15% ‘ ’ ).

- Canal+ : 1995 6 1 CSA Canal+ 4  
4.5% , ,

1990 1 17 10  
10% . France2 France3  
1998 5 8 France2 France3 “  
11.5% ‘ ’

” .  
10- 1 (CSA)

. M6  
70%  
2000 TF1 12 1  
9 4 5 .

3%  
, 2.5% ‘ (EOF)’ . 1995  
5 9 10 11 Canal+ 가가  
25% (20% )

TF1 2000 21 2 3 9 9  
. 1999 TV

&lt; -6&gt; 1999 TV

	60%	EOF 40%
	(%)	(%)
FESTIVAL	96	97
Histoire	78	67
LA CHAINE HISTOIRE	90	41
MEZZO	75	53
MUZZIK	63	50
SEASONS	100	100
TELETOON	84	54
TV5	95	100

	60%	EOF 40%
	(%)	(%)
POLAR	77	40
XXL	87	78

	60%	EOF 40%
	(%)	(%)
COMEDIE !	55	46
PARIS PREMIERE	53	40

	60%	EOF 40%
	(%)	(%)
CINE PALACE	83	21
CINESTAR 1	51	40
CINETOILE	48	40
RIRE	66	39
ROMANCEL	70	33



Canal+ (1983 1995 1,847 가  
 46% Canal+ 28% Canal+ ,  
 5% 21%  
 ).  
 가  
 1990 1996 1 1  
 1998 12 31 . 21 가 TF1  
 1 TF1 가  
 TF1  
 가 TF1

< -7> 1990 1998

	TF1	France2	France3	M6	Arte
	77.6	45.3	35.3	51.2	32.5

: CNC

가

3)

/  
 , CNC(Centre National  
 la Cinematographie) . CNC 1999 24 8,500

가 1 6,000 가 26 4,000  
 . 2000 10 CNC가 2001  
 (< -8>, < -9>).

< -8> 2001 CNC

		( )	
TSA	11%	6 3,400	1 7,600
	5.5%	21 5,000	36% , 64%
	2%	8,000	85% , 15%
			,
		28 6,400	

: CNC

< -9> 2001

		( )	
가 ( )	CNC	1 7,400	- 3.6%
	( )	4,575	+ 18%
		2 1,770	0.3%

: CNC

30 8,000

, ,  
 ,  
 ,  
 , , , , ,  
 .  
 ,

(André Marleaux)

(Jacques Lang)

(1)

(1993 )

가

(< 17>)

CNC

( 18 )

가

5

가

가

CNC

(Registre Public de la Cinématographie et de l'audiovisuel: RPCA)

< - 10 >

	$x \quad x \text{ TSA}( 11\% ) x 130\%$	5
	$\{(2MF \quad 12\% ) + (2MF \quad x5\% )\} x 60\%$	8
	$x 100\%$	6

: CNC

(2)

가

(Compte de soutien financier de l'Etat à l'Industrie des programmes au COSIP) , 1999 10

200 . 7 900 , 1 400

, 1 4,400

가 가

(ARTE)

(Le Fonds Audiovisuel International: FAVI)

250

1999

42

. 1986

203

“ (Regard sur le cinéma)”

( , )

. 1

1999

8

40

(3)

(Programme pour la recherche et l'innovation

l'audiovisuel et le multimédia: PRIAMM)

가 CNC가

-

183

56 가 9,000  
24 가

, DVD

4)

2000 8

5

2002

가

, TV,  
, 가  
,

(1)

가.

(simulcast)

5 가  
가

가 5  
30 - 1 3 가  
가 4 , “ 가  
가 가 6 .”

(2)

가  
2 가 가  
- 400 가  
- 300 가 가

185

- 600 (distributeur)  
 가  
 - 가 12  
 20%

(3)

France Television

2001

. CSA 2000 9 30 가

2000 10 31

. CSA

1 , 2001 8 1

가

CSA 2001 2/4

가

2002

2003 8 1

(CSA) 2001 7 24

. CSA 2002 3

가

가

2002 12

25 ,

. 2002

33 ,

(4)

가

가.

가

가

가

가

가

( 20 30

)

( , , 가 )

( ), ( ), ( )

( )

가

가

가

가 가

가

(5)

:

(

)

3

10

가

49%

2.

1)

. France 2, France 3

Cinquieme, RFO

France Television

(Canal+)

DTH

TPS

10

TF1

(Bouygues)

(Canal+)

(Vivendi)

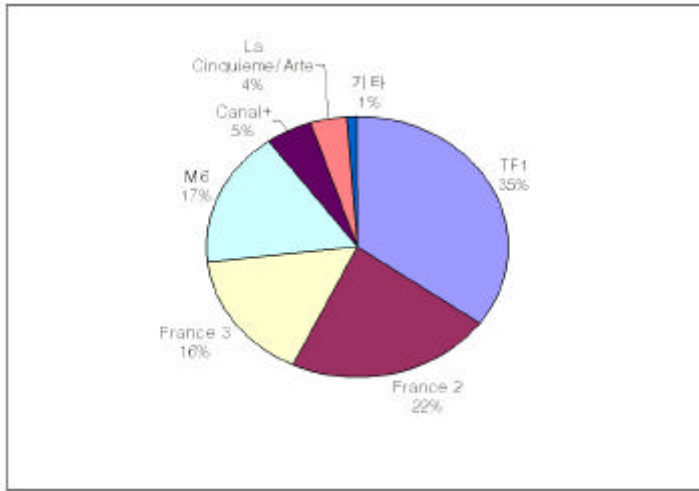
, M6

-

(Suez-Lyonnaise

(Pathe) (Vivendi)

(1)



: IDATE

[ - 1 ]

4 3

France 2, France 3, -

Arte,

La Cinquieme

TF1,

M6,

CanalPlus가

TF1

France 2 France3가

France 2

France 2

France 3

12

8

TF1

, 2000

< - 11 > (1997)  
( : )

1	Canal +	13,590
2	TF 1	10,310
3	France 3	5,507
4	France 2	5,392
5	M6	3,001
6	Europe 1	2,911
7	Radio France	2,378
8	Canal Satellite	1,234
9	NRJ	1,230
10	RFO	1,225

: IDATE

< - 12 > 2000 TF1  
. TF1 2000 가  
100 TF1 91 .

< - 12 > (2000 )  
( : %)

	TF1	France 2	France 3	M6
	33.4	22.1	16.8	12.7

: IDATE

< - 13 > 가 ( : )

	1995	1996	1997	1998	1999
	1854.51	1935.30	1857.33	1919.22	2011.00

: IDATE

< - 14 > 가 ( : )

	1995	1996	1997	1998	1999
	2548.41	2659.83	2792.83	2971.57	3239.00

: IDATE

< - 15 > ( : )

	1997		1998		1999	
		(%)		(%)		(%)
	3,136.95	41.14	3,303.94	40.37	3,449.05	39.18
	2,402.01	31.50	2,747.04	33.56	3,213.72	36.50
	2,086.17	27.36	2,133.89	26.07	2,141.41	24.32

\* (public funding) licence fee

: IDATE

2000 8 TV  
 TV  
 France 2, France 3, La Cinquieme, RFO France Televisio  
 1 12 8  
 250

(5 ) 가

110 (2 2,000 )

< - 16 >

	1990	1995
	25,106	34,103
	1,430	1,386
	1,749	2,700
	1,716	2,387
	3,401	5,201
	999	1,134
	5,216	5,185
	92	862
TV,	10,503	12,411( 9805, . 1055, / 2,499)

: Quid 2001

가.

가 가

. 2 France 2 France 3

가 ,

가 France 2 1991

40%, 1997 51%가 , France 3

15% 33% 가

,

France 2 France 3 1998 , 19  
 . 24%  
 France 2 1997 23.7% , 22.4% , 1999 6 22.1%  
 . France 3 1997 17.1% , 1998 17% , 1999  
 16.3% .  
 2 , France 2 20%  
 . 2 France 2 23.2%  
 20.4% . France 2 「Rastigna  
 2 26 17% .  
 .  
 TF1 M6 가 .  
 TF1 35.3% , 1997 35% 1999 35.4%  
 . TF1 5.8% , 1,090 4,000 가 , 가  
 4.7% , 804 6,000 가 , 9%  
 285 8,000 가 . 50.2%  
 . TPS 48.5% 가 7 1,600  
 . TF1 ,  
 . 33% TV 53.7% (  
 18%) ,  
 Lehman Brothers TF1 2000 16.2%  
 5% 가 . 2002 6% , 2003 5%  
 가 .  
 TF1  
 . DTH TPS 25%  
 , ,

, TF1  
 2001 24 9.6%  
 가 2000 19.4%  
 2000 12.5% 가 . TF1 50  
 TF1 TV  
 1997 180 2000  
 193 50 1997 174  
 196 TV  
 TF1 50 33%  
 35.9%  
 RTL M6 . M6 12%  
 2000 21.4%  
 TF1 M6  
 , 1997 12.7%, 1998 12.9%, 1999 13.6%  
 . TF1 가 TPS 25% , TF6  
 가

	Tele Toulouse	Tele Lyon Metropole
	1988. 4. 7	1989. 2.20
가	1987.12. 7	1988. 7.11
가	2000. 9.12	2001. 5. 2
가	5 2000.11.29	5 2001. 9. 1
	2	2
	Toulouse	Lyon

	Clermont 1 <sup>ere</sup>	TV 7 Bordeaux	Canal 32
	2000. 10. 9	2001. 6. 7	2001. 10. 30
가	2000. 6. 6	2000. 7. 26	2001. 7. 24
가	2000. 6. 6	2000. 7. 26	2001. 7. 24
가	5 2000. 7. 1	5 2001. 1. 1	5 2001. 10. 1
	1	1	1
	Clermont-Ferrand	Bordeaux	Troyes

< - 18 >

	Aqui TV	TV8 Mont Blanc
	1988.11. 8	1989. 2.15
가	1990.12.14	1988. 6.17
가	1997.10.30	2000. 7.26
가	5 1997.11.14	5 2000. 8. 1
	11	35
	Dordogne	Dordogne

< - 19 >

	Tele 102	Tele Sud Vendee
	1999	2000
가	1999. 7.19	1999.11.18
가	1999. 7.19	1999.11.18
가	5 1999. 7.20	5 2000. 1. 1
	1	1
	Vendee (Les Sables-d'Olonne)	Vendee (Lucon)

&lt; -20 &gt;

REUNION	Antenne Reunion	Canal Reunion
		1991. 3
가	2000. 3. 2	1990. 7.19
가	1994. 7. 5	2000. 6. 6
가	8 1995. 1. 1	5 2000. 8.31
	7	16

GUYANE	Antenne Creole Guyane	Canal Guyane
	1994. 3.15	1996. 3.22
가	1994. 3.15	1994.10.18
가	1997. 9.23	1994.10.18
가	5 1998. 3.15	10 1995. 1. 1
	5	1

MARTINIQUE	Antilles Television	Canal Antilles
	1993. 2	1993. 7.12
가	1992. 6. 5	1993. 1. 5
가	1999. 8.31	1994. 6. 7
가	5 2000. 2. 7	10 2003. 2.12
	4	2

GUADELOUPE	L'A1 Guadeloupe	Canal 10	Eclair TV	Canal Antilles
				1993. 7. 12
가	1998. 1. 17	1998.11.17	1998.11.17	1993. 1. 5
가	1998. 1. 17	1998.11.17	1998.11.17	1994. 6. 7
가	5 1999. 1.15	5 1999. 1.15	5 1999. 1.15	10 2003. 2.12
	2	1	1	1

TOM	Tahiti Nui TV	Canal Polynesie	Canal Caledonie
	2000. 6.29	1994.12.22	1994.12.31
가	2000. 6.27	1994. 6.17	1994. 6. 7
가	2000. 6.27	1994. 6.17	1994. 6. 7
가	5 2000. 6.29	10 1995. 1. 1	10 1995. 1. 1
	4	2	3

: CSA

TPS가 DTH (Canalsatellite) 가



&lt; -22&gt;

	SO	가
Cuvelle	3	768
Est Videocommunication	117	119,602
France Telecom Cable	133	707,920
Ger-TV	2	1,630
Lyonnaise Cable	19	756,277
Martinique TV Cable	1	18,693
NC Numericable	31	672,447
NTL France	5	75,466
Region Communication S.A.	4	1,621
Ste de conception et de gestion de services	8	4,706
Usine d'electricite de Metz	27	8,251
UPC France/ Citereseau	2	41,725
UPC France/ InterComm	29	30,300
UPC France/ Mediaréseaux	1	37,275
UPC France/ Réseaux cables de France	9	75,050
UPC France/ Rhone Vision Cable	1	48,400
UPC France/ Videopole	83	145,375
Valvision	3	14,026
World Satellite Guadeloupe	1	28,587
Divers	32	113,604
	511	2,901,723

: Quid 2001

(France Telecom)

(Planete) J (Canal J)  
 , 가 2 (400 )  
 TPS (Odyssey)  
 (Teletoon) J 가 5  
 . 76 5,151 가 가  
 (Cable Lyonnaise) 6  
 8,311 가 , NC (NC Numuricable) 63 7,084  
 . TPS  
 ( TPS (Canalsatellite  
 ), ,  
 .  
 3 MSO Lyonnaise Cable, France Telecom Cable  
 Numreicable 가 73.6% .  
 J  
 .  
 (CSA 1997 4 2,000 (840  
 TV 3% .)  
 , 1997 3.8% 1998 4.6%  
 . (Mediametrie)  
 가  
 가 2 .

&lt; -23&gt;

	( )	(%)
Canal J	179	Lyonnaise Communications 28, Canal+ 22, Bayard Peresse 6, CGE et Generale d'images 6, Marie-Claire 2
Canal Jimmy	117	Canal+ 42.5, Gen d'images 42.5, Lyonnaise Communications 15
Chaîne meteo, Cine-Cinefil	37.3	Canal+ 30, Gen d'images 30, Sinedi 20, Lyonnaise Communications 20
Cine-Cinemas	-	
Educable	-	
EurosportFrance.LCI	-	TF1 100
MCM	-	Gen d'images 31.6, Canal+ 19, NRJ 15, Com-Dev 14, Lyonnaise communications 12
Multivision	4	Lyonnaise Communications, 26, France Telecom 25, CLT 24.5, TF1 24.5
Muzzik	-	
Paris Premiere	48.4	Lyonnaise Communications 50.5, Canal+ 15, Paris TV Cable 4.5, Marie-Claire Album 10, Cash Edi 5, Com-Dev Images 5, M6 10
Planete	48.4	Gen d'images 34.5, Canal+ 34.5, Com-Dev Images 17, Lyonnaise Communications 13
Serie Club	-	M6-Metropole, Television 100
Tele Achat	-	Plaisance Televisions 66, VT Com 34
Tele a la carte	-	Region Cable, Teledistribution 100
TV Guide	-	AFP 25.68, Marta. Hachette 25.68, Multimedia. Com-Dev, Images 19.90, Lyonnaise Communications 19.78, VT-Com 8.96

: Quid 2001

1998

, 7

, 3

61

. 1998

201

45% 30 가

1999 , CSA ,

61

70 9 가 가 . 27%가 가 3

. 1999

25 .

< -24> / TV 가

( : )

	1995	1996	1997	1998	1999
	1.600	1.900	2.100	2.331	2.545
	0.000	0.000	0.100	0.219	0.321
	0.305	0.150	0.100	0.000	0.000
	0.000	0.300	1.150	1.735	2.250

: IDATE

1993 1999 4.4 가 ,

360 10% . 가 가

, 93 87 99 285 가 ,

가 10 225 .

MSO TV .

MSO 2000 가 304 가 7.3%

, 2001 310 280 DTH

2000 MSO Noos, French Telecom,

Numericalbe, UPC/Mediareseaux, UPC/Videopole, Est Videocom, NTL

202

2001-3 15 7,000 가  
 13% ( TV 가 )  
 MSO 2002

< -25> : (1999)

		가	
RTL-9			2,944,000
Eurosport			2,367,000
LCI			1,774,000
TMC			1,560,000
Planete			1,242,000
MCM			1,181,000
Paris Premiere			1,141,000
Cinestar 1/2			978,000
TV5		F,B,CH & Can.	906,000
Canal J			438,000

: CSA

&lt; -26&gt;

(2000. 5)

1	7 A LIMOGES	1997. 1. 17.
2	AV7 TV	1995. 11. 2.
3	ACTELONG	1996. 1. 7
4	ALSATIC	1999. 12. 17
5	ARCABLE	1998. 11. 24
6	ASTV	1993. 12. 24
7	BEFFROI VISION	1993. 11. 15
8	C9 TV	1998. 5. 26
9	CABLE 8	2000. 1. 12
10	CANAL 15	1994. 4. 27, 1999.11.4
11	CANAL 26	1999. 12. 29
12	CANAL 50	1994. 4. 27, 1999. 6. 29
13	CANAL 70	1997. 5. 26
14	CANAL 8 LE MANS	1994. 10. 18, 1999. 12. 14
15	CANAL 9	
16	CANAL A	1996. 10. 16
17	CANAL BREBIERES	
18	CANAL BRESTEL	1995. 10. 17
19	CANAL C	1994. 7. 26, 1997. 12. 30
20	CANAL FI	1997. 2. 12
21	CANAL GAMBSHEIM	1995. 6. 1
22	CANAL HA !	1995. 12. 4
23	CANAL HUIT	1995. 10. 1
24	CANAL INFO STRASBOURG	2000. 3. 15
25	CANAL LOCAL A FOR-DE-FRANCE	1996. 1. 7
26	CANAL LOCAL DE BASSE-HAM	2000. 3. 9
27	CANAL LOCAL DE CHAUMONT	1999. 1. 25
28	CANAL LOCAL DE CHOLET	1996. 12. 18
29	CANAL LOCAL DE SCHWEIGHOUSE SUR MODER	

30	CANAL LOCAL DE TELEVISION D'ABRESCHVILLER(CLTA)	1995. 6. 1
31	CANAL LOCAL D'ERSTEIN	1995. 6. 1
32	CANAL MARITIMA	1995. 12. 4
33	CANAL STIM	1995. 10. 1
34	CANNES TV	2000. 3. 15
35	CAP CANAL	1996. 1. 7
36	CITES TELEVISION	2000. 3. 9
37	CITYZEN TV	1999. 1. 25
38	CRESPIN TELEVISION	1996. 12. 18
39	CVS (Creutzwald et L'Hopital)	
40	DIVERCITE	1995. 6. 1
41	H.V.S(Hombourg-Haut)	1995. 6. 1
42	IMAGES PLUS	1995. 12. 4
43	LA 8 NOTRE TELEVISION	1995. 10. 1
44	LCL	2000. 3. 15
45	MARBACHE TELE LOCALE (Marbache)	2000. 2. 4
46	MSTRAL TV (Beucaire)	1998. 6. 24
47	PERPIGNAN INFOS (PERGINAN)	
48	PROXITELE (Menton)	1999. 9. 24
49	REGARDS SUR ...(Saint-Claude)	1997 1. 30
50	REGARDS SUR LA VILLE (Talange)	
51	RTV ROMBAS (Rombas-pierrevillers)	1993.11. 3
52	T.V.O (Television locale d'Oberhoffen-sur-Moder)	1999 8. 3
53	T2i (Issy-les-Moulineaux)	1998.12. 9
54	TARBES ACTUALITES (Tarbes)	2000. 2.21
55	TELE DIEUE (Dieue-sur-Meuse)	1996. 5. 2
56	TELE DOLE	1999.11.29
57	TELE MAIZIERES (Maizieres-les-Metz)	1998. 8.19
58	TELE MENOUE (Sainte-Menhould)	1995. 6. 178
59	TELE MIROIR (Nimes)	1999. 2. 17

60	TELESSONNE (Massy et communes associees)	1994.5. 31 1999. 7. 21
61	TELEVISION COMMUNAUTAIRE DE LA GUADELOUPE (TCG)	1999. 7. 28
62	TELEVISION LOCALE DE BACCARAT	1993. 11. 23
63	TELEVISION LOCALE DE BIESHEIM	1993. 9. 28
64	TELEVISION LOCALE DE BISCHWILLER	1997. 3. 24
65	TELEVISION LOCALE D'OTTROTT	1995. 8. 11
66	TELEVISION MARSEILLE PROVENCE (MARSEILLE)	2000. 3. 7
67	TV 10 ANGERS	1994. 1. 21 1999. 9.13
68	TV 7 (Colmar)	1998. 6. 29
69	TV 8 (Clermont-Ferrand)	1998. 8. 19
70	TV 8 MOSELLE-EST (Forbach et communes associees)	1999. 10. 29
71	TV CRISTAL (Pays de Bitche)	1997. 8. 14
72	TV FIL 78 (Saint-Quentin-en-Yvelines et communes associees)	1993. 10. 25
73	TV LOCALE DU VAL D'ARGENT (Saint-Marie-aux-Mines et com.as.)	1993. 9. 28
74	TV RENNES	1994. 9. 27
75	TV ROSSELLE TVR (Petite Rosselle)	1997. 12. 20
76	TV THERMALE (Bourbonne-les-Bains)	1993. 9. 28
77	VB9 (Villard-Bonnot)	1996. 2. 95
78	YVELINES PREMIERE (Saint-Germain-en-Laye et communes associees)	

: CSA

(3)

Canal+

TPS(Television Par Satellite)

2000 1 , Lagardere Vivendi 20%, Time Warner 10% ,  
4% , 34% 50

CS . , Largardere , Liberty Media,  
 Vivendi Multithematiques 27.4% .

가 . Largardere MCM  
 Canal J , Elle

< -27> 가 ( , )

	TV 가 ( )	가 가 (%)	가 (%)
	34	48	30
	4	92	7
	96	65	15
	13	3	10
	22	10	10
	23	6	18
	21	-	6
	6,5	90	8

TPS

France Television, TF1 M6 TPS 1996

DTH

TPS

가

( 가

25%가

),

TPS Canalsatellite 가

2000 , Canalsatellite TPS 100 가 60 가

, Canalsatellite가 가 200

TPS Canalsatellite 19.3% 27.6% 가 가 .

Merrill Lynch 3 Canalsatellite가 DTH 가 55%  
 , 2005 TPS가 210 가  
 Canalsatellite 310 가  
 TPS (first-run)  
 가 Warner  
 Disney (Miramax ), Universal, Columbia Tristar  
 , TPS Disney Columbia Tristar  
 . TPS  
 TPS PPV  
 TPS - France 2 France  
 4 Canalsatellite -  
 . TPS 2002-3 150 가

< -28 >

Astra	TV Sport France, Eurosport
TDF 1/TDF2	Canal+, MCM, Canal France International
Telecom 2A	Canal+, Canal J, Canal Jimmy, Cine-Cinefil, Cine-Cinemas, Planete, TV Sport France, MCM, France 2
Telecom 2B	TF1, France 2, Canal J, Canal Jimmy, Canal+, Arte, M6
Eutesat -F1 et HotBird	La Cinquieme, Arte, MCM International, 4, TV5, Canal+ Horizons, ABChannel
-F3	RTM1, Nile TV international, TV7 Tunisie, Algerian TV
-F4	Quorum Satellite Network

: Quid 2001

TV  
 740 가  
 가 가  
 Canalsatellite 가 2000  
 60% 58% TV가  
 1% TV 4.5%  
 50% 25%  
 20%가  
 45% 15% 40%  
 20%  
 80%  
 Studiocanal  
 192  
 192 104 TV  
 (Feature film)  
 ( )  
 2)  
 (1)  
 TV 6 가

Television 가 CSA France  
 가 TV 가  
 가 , TV /  
 가 , TF1, M6,  
 Canal+가 2  
 가  
 TV TV 가 5  
 , 49%

(2)

1979 가  
 85%, 가 60% 4  
 Noos France Telecom 25% 2 , NC Numericable가 24  
 , UPC France가 13% 4 . UPC  
 2  
 TV  
 European Directive , 1999 UPC가  
 1G , France Telecom Suez-Lyonnaise de Eaux  
 Numericable .

French cab  
 operators association 1999 2002  
 가 .

(3)

1993 . CanalSatellite  
 , 1996 . TPS ABS  
 가 , ABSat  
 CanalSatellite, TPS . CanalSatellite  
 Pathe 가 Lagardere 가 .

< -29> (1998)

				가
DirecTV		Hugues Electronics, General Motors	1994	4.5
Primestar		Canle-operateurs americains	1995	2.3
Canal+ Numerique		Canal Plus	1996. 4	1.1
TPS		M6, TF1, France Television, France Telecom, CLT, Lyonnaise des eaux	1996. 12	0.65
DF1		Kirch	1996. 7	0.04
Via Digital		Telefornica, TVE, Televisa	1997. 9	0.4
Canal Satellite Digital		Canal +, Antenna 3, Prisa	1997. 2	0.6
Stream		Telecom Italia		0.12
British Interactive Broadcasting		News Corp, Britush Telecom, Midland, Matsushita		-
British Digital Broadcasting		Granada, Carlton		-

: CSA

가 가  
 , 가 .  
 TV가 가 가 :

- TV
- CanalSatellite TPS ‘ ’ TV
  - , 가 가
  - 가 . 1999
  - 가 90%가 가
  - CanalSatellite 150 가 2000
  - . TPS 2000 100 가
  - . ABSat 45 가

(4)

가 가

Canal+ Canal+

. CanalSatellite 58 45 , 20

121 가

6

TPS 131 TV , 40 45

, 35 . TPS 4 가

6가

1998 France Telecom ‘a la ca

. France Telecom Cable “Modulo Cable”

, 가 : Modulo Direct 가

가 / 13~ 20 ; Modulo Cartes

; Modulo Cincos 20 . 1999 11 Lyon

Cable “Etoiles”

가 가 , 가

가 . , FTC 가

60%가 가 , Noos 가 가 1

50% 가 .

< -30 >

			Brfoa mode
ABSat	1996. 12	MMP 50% - C.Berda 40% - J-L Azoulay 10%	
Canal+	1996. 4(numerique) ( : 1984.11)	Vivendi 48.8% - CDC 3.5% - Societe Generale 0.6%	
CanalSatellite	1996. 4( ) ( : 1992)	Canal+ 66% - Groupe Lagarde 34%	
TPS - Television par Satellite	1996. 12	TF1 25% - M6 25% - Lyonnaise Communication 25% - France Telecom et France Television numerique 25%	
France Telecom Cable	1997. 9	France Telecom 100%	
Lyonnaise Cable	1997. 9	Lyonnaise Communication 50.1% - NTL+Morgan Stanley 49.9%	
NC Numericable	1997. 4	Canal+ 28% - Exante 28% - France Telecom 42%	

: CSA

3.

1)

2000

France 2, France 3, La Cinquieme, RFO

France Television가 ,

. 가 100% .

Canal+ Vivendi  
 TV 1 가 . 1,200 가 2000 2,000

Canal+ Pathe  
 TV Vivendi 2000 6  
 Seagram 340  
 , Canal+  
 Universal Music,  
 Universal Studio. Canal+, Cegetel, Vivendi Net, Havas

가 24.5%

BskyB Canal+ , BskyB  
 Canal+ Campaigne  
 Generale de Videocommunication ( NC Numericable),  
 NetHold TV , AOL/Compuserve France  
 18.3% . CanalSatellite Pathe 가  
 Lagarde 가 가 . ( Canal+가 66%, Lagarde  
 34% )

< -31 >

( : )

		가		
1	Bertelsman		7,640	12,926
2	Havas		6,516	8,859
3	ARD		4,650	5,597
4	Lagarde		3,734	11,290
5	BBC		3,732	3,824
6	Pearson		3,293	3,755
7	Wolters Kluwer		2,668	2,668
8	CLT-UFA		2,592	2,592
9	Carlton		2,536	2,865
10	RAI		2,353	2,353

: Quid 2001

2)

(1) France Television

가.

France Television France 2 France 3, 가

. 2 1964 3 1972 . 1989 8 2

, 2000

France Televisio

France 2, France 3, La Cinquieme, RFO ,

. 100%

France Television 2000 138 1999

10%( 13 ) 가 가 .

< -32> France 2 (1998)

	53 1,600		370
	- 0.7%		- 94%
	1,488	100	49

: IDATE

< -33> France 3 (1998)

	58 4,900		530
	3%		167%
	3,950	100	44

: IDATE

1992 , Antennae France 2 , FR3 France 3 ,  
 TV  
 France Television  
 .(1991 32.7%/ 1996 41.9%) , 1996  
 , 1999  
 38.5% .  
 France 2 , 1999 9 80 ,  
 2 4 9 8 (98 370 )  
 . 99 22.3% 98 22.5%  
 France 3 , 1999 1 1 8 6 , 98  
 6 8 5 (98 530 ) 가  
 ,  
 98 11.2% 99 10.2%

## &lt; -34&gt; France Television 1998

( : )

	France 2	France 3
	- 249.8	- 168.5
	22.5%	11.2%

: CSA

## &lt; -35&gt; France Television 1999

( : )

	France 2	France 3
	- 90.8	- 118.6
	22.3%	10.2%

: CSA

## &lt; -36&gt; France Television 2000

( : )

	France 2	France 3	La Cinquieme
	6,143.3	6,381	803.2
/	3,406.7	4,122	734.8
	2,646.9	1,737.7	59.6
	9,433.1	8,418.7	1,343.8
	9,226.3	8,455	1,317.1
	206.8	- 36.3	26.7

: France Television

2000 1999 2 1  
3 4 가 1 9 7  
France Television 4 3

가  
가 3 France3  
France2 France3  
(Euro2000 ) France3

La Cinquieme 2000 Arte France

France 2 France 3 가  
:

• 가 (representative Professional)

• Institut National de la Consommation

- 가 “ ”
- 

positioning  
France 2 ,

France 3 ‘ (neighbourhood)’

, 2000 가 ,

2000 3 40.7% 가  
 가 3

(2) Canal+

가.

< -37> Canal+

가		(%)	가
	Canal+ TVCF	42.5	202,564
	Canal+ Flandre	-	191,724
	Canal + Italie(Telepiu)	99	2,144,459
	Canal + Espagne	19.7	579,721
	Canal+ Nederland	-	293,538
	Canal+ Polska	33	627,331
	Canal Horizons - Tunisie - Cote d'Ivoire - Gabon - Togo - Maroc	80.7	120,355
	Canal+ nordiques	-	782,970

: CSA

1999 , Canal+ 216 , 16%  
 가 . Canal+ , 110  
 7.5% , CanalSatellite , 30  
 39% . TV Canal+  
 1,360 가 660 가  
 , 490 Canal+ 가 130  
 CanalSatellite 가 . 11 700  
 가 가 . 가 29% 400 (  
 170 , 230 )가 가 .

< -38> Canal+ (1998)

	1620		- 1 8 5
	19.5%		- 112.1%
	3,810	100	26

: IDATE

< -39> Canal+ (1999)

		가	
105 8 1	5 5 8	4,576,459	1,747,000

: CSA

1999 Canal+ . ,  
 Tele+ 99% , 8 2 6  
 . 2 2 , Canal+  
 7 7 4 .  
 Canal+ 1998 7.5%  
 105 8 1 85.1% 90 1 9

220

가 ( 5% 가), 5 5 8  
 11.6% 가 .  
 가 , 1998 444 1 5 99  
 457 6 4 5 9 가 , 174 7  
 . , 가 1998 2 9 7  
 2 9 가 33 2 9 .  
 1999 11.6%가 가 , ,

1985 Canal Plus , ' ,  
 1990 , .

- ( Multithematiques 1992  
 , , , , , 21rom  
 ), (1992 CanalSatellite  
 , 1997 Campagne Generale de Videocommunication -  
 Numericable - )

- Canal Plus TV 가  
 . CanalSatellite  
 1996 4 가  
 , TV ( , interactive  
 transactional ) ,  
 . Canal Plus  
 , Berstelsman, Cegetel, AOL  
 (AOL/ Compuserve France) .

- Canal Plus , -  
 . Le Studio Canal Plus  
 가 ; Ellipse 3  
 가 , Canal Plus Image International Canal Plus  
 2

• Canal Plus 1991

· ;, , ,

• pay-TV

· , , , , , , ,

, , , , 가 Canal Plus가

· , 가 Canal Plus Warner Br

Pathe, Kirch , CLT-UFA, TCI

·

· positioning

1997 Canal Plus ,

NetHold pay-TV pay-TV

, Campagne Generale de Videocommunications(1998 NC Nume

) 2 cable 가 ,

(1997 1 ), D+ (1997 8 )

TV , Premiere Kirch

Kirch TELE+

·

, 1998 Canal Plus

· CanalSatellite

10% , Exante NC-Numericable 37% .

Canal Plus , Canal Digital

Le Bouquet TV

· , ‘ ’( , ,

) .

Canal Plus Vivendi Pathe CanalSatellite

, BSkyB . CanalSatelli

Canal Plus , 90%  
, Canal Plus BSkyB 가

TELE+

. RAI 4.1% (10% ) , Enel 30%  
The Rizzoli Corriere della Sera press group

:

• AOL, , Cetegel Canal Plus

• Infogrammes 50/50 , ,

, , Game One  
TV Astra ,

(3) TF1

TF1 A/V . TF1 1975  
, 1987 Bouygu

Group가 10 , 1996 5

TF1 TV . 24 ,  
99.9% , TF1

1 , 가

• TV , , ,

TV , Dutc  
ISP World on Line 15%

25%

가 가

< -40> TF1 (1998)

	109		7 1,580
	5.7%		48.7%
	2,177	Top 100	30

: IDATE

1998 TF1 5.7% 109 4  
 4.7% 80 4 6  
 , TF  
 Eurosport La Chaine Info 15%, 25%  
 , TPS pay-TV  
 48% , (financ  
 operations) 78% 가 . 1997 가 1998 TF1  
 . 가 1997 13.7% 가 30 3 3  
 . 1999 TF1 60  
 9.5% . 8.5% 가  
 1 2 , 가  
 가 . 13% 가 ,  
 , , .  
 TF1 2000 .  
 16% 가 100 .  
 16.2% , 5 8.1% ( 77  
 . TF1 1999 46.3% 가 27  
 6 5 .

< -41> TF1 2000

	105		27 6,500
	16.2%		46.8%

: CSA

TF1 2000

2.7% 가 53.8%

TF1 2000 1999

11 7 3

가 23 4 9

TF1

가

1999 72.9% 2000 69%

TF1

가

1999 27.1% 2000 30%

3)

(1) France Television

France Television

가

:

(ZDF, ARD, RAI )

CCTV, NHK

France Television

TDF, Marta Hac

Multimedia, Thomson

France Television Interactive

"fr.tv"

France Television Interactive

TV

가,

. France Television TV

:

- France 2 France 3
- 
- 
- on-demand
- 

France Television

pay-TV

가

France Television

4

. France Television TPS TF1, M6, Suez-Lyon  
 des Eaux, France Telecom TV  
 France Television . 1996

- 1997 , 가 : Regions  
 France 3 50.01%

- Mezzo , France Telecom  
 France 2가

(2) Canal Plus(Canal+)

1280 가 (1999 9 ) 가

BSkyB

. 1999 4가

:

- : ( , TV), ,

가

(value component)

- 가 Cana Plus
- 가

- Mediaguard Mediahighway system , AOL/Compuserve France , Canal New Media , Canal Plus Multimedia

Canal Plus . 1984 , pay-TV 가 ( , , , , )

CanalSatellite . 1990 , Canal Plu ,

TPS

가 , 가 , 가 . Mediaguar access control Mediahighway interactive software

(3) TF 1

TF1 1998

- ,
- , 가가
- , 가
- 

TF1 Interactif

가 ,  
가

TF1 15% TV ,  
3% .  
TF1 , 1998 , USPA , TF1  
Heavy fiction Banco Production .  
Film Production TF1 TV  
. 1987 , TF1 178 180 .

1993 TF1 TF1 International  
TV . TF1

23000 1800 A/V  
3 .

< -42> TF1

	/ (%)
	TF 1 Publicite(100)
	Protecrea(100), TF1 Films Production(100), Studio 7(100), groupe Glem(73), Film par film(50)
,	TF 1 Entreprises(100)
	TF 1 Europe(100), Ste d'exploitation de documentaires-Odysee(100), La Chine Info (100), Sagas(34), TV Sport(31)
	TMC Droits audiovisuels(34), Syalis(100)
TV	TF 1 Developpement(100)
	e-TF1(100), World On Line France(13), Mageos(21)

: QUID 2001

TF1 Enterprises TF 1 Video Label

, TF1

. TF 1 Video

. Une Musiques

1992

1

. 120

Tele-shopping

( , , , )

. 1998

1

. Studio TF1 1993 10

TF1,

Digital TV

1996 TF1 TV TPS 25% TV  
 . TPS TF1, M6, CLT, la Lyonnaise de Eaux, France Telecom,  
 Television 1996 , 1997 12 17  
 TPS 4가 .  
 1998 TPS 9 가 가  
 . 1998 TPS 가 61 5  
 1999 8 72 가 .

< -43 > TPS

TPS Thematiques	, , , , 70
TPS Cinema	4
Tout TPS	가
Super TPS	가 Super Foot

: IDATE

. 1991 TF1  
 Canal Plus Eurosport . 1993 , Eurosport TESN  
 . , TF1 Eurosport France  
 , Eurosport 1998 , 16 47 8,100

La Chaine Info(LCI) 1994 6 , T  
 CanalSatellit . LCI 3

230

3 가 . 1997 1 Odyssee  
 1 20 . Odyssee , ,  
 , TPS 14  
 . TF1 가 Shopping  
 Avenue , , 1,200

4)

가 . UPC, NTL, Intercomm  
 (CSA)  
 ,  
 ,  
 ,  
 가  
 , France Tele- com 가  
 가  
 . France Telecom  
 , 가  
 . 6  
 ,  
 6  
 가 . CSA가 ,  
 1998 4.3% 1999 7 17%

가 .

Suez-Lyonnaise des eaux, Canal Plus, F

Telecom , 가

가

EDF R

seaux cables fran qis de Vidpole R seaux cable de France

France T 1 com Toulon( ) Paris

NTL, Services de France Sud cable Services Intercomm

가 Intercomm 4 100 가

가 , UnitedGlobalCom

Microsoft UPC 3,000 가 France Miar s

Marne 2001 6 가 ,

France Miar seaux Ma

3 Montreuil-sous- Bois Limoges(

Time Warner Cable France ,

9 7,300 가 R seaux Cable de Fran

NTL France T 1 com

가

Exante Canal Plus가

NCumicable 37% , Daniel James Forey

Valvision 가

Lyonnaise Communications

, Lyonnaise Communications 1998 UStest  
 , 가 .  
 , , CSA  
 . CSA 가  
 , 가  
 .  
 NTL 5  
 . NTL 4  
 , 1  
 (Toulon) 5 . 26  
 6,000가 7,600 가 가 , 28.  
 . NTL 2000 가 35  
 ~ 450 가 , 2  
 가 가  
 . 3 50 ~ 60% 가 3가  
 가 .

5)

CNC(Centrale National du Cinema) 5.5% ,  
 11%  
 . ,  
 1994 11.2% 1996 8.5%  
 6.3% 6.2% 54.3% 35.8% .  
 1989 1 6,000 1996 4 9,400

3 가 가 .  
 , ,  
 1999 .(- 12%) 가  
 (- 32%) . 2000  
 가 hehfdktjTsmsep, ( , )  
 . 1998 1999  
 가 , 20% .

< -44 > 1999

				,	,	,
(%)	28	26	21	14	8	3

: INA, TVFI, DDM, CNC

1998 199  
 가 95%  
 .  
 . 6%  
 1998 1999  
 2000 가 ,  
 1999 가  
 , 13% 6% , 9% 4%  
 1998  
 가 가 (86%),  
 가 가 .( &% 1999 12%  
 가) 가 가 .(25%)  
 가 가

1999 66% 가 . 1999 가 . 1998 56% 가 .

< -45 >

(%)	66	12	6	5	4	4	3

: INA, TVFI, DDM, CNC

4.

1)

, 1 , 2  
 , TF1 가  
 , 2 France 2 , TF1 가  
 , France 2 TF1 가  
 , Canal+ 가 , M6 가 ,  
 , Arte L  
 Cinquieme , France 3 ,

2)

(1) France 2

&lt; -46&gt; France 2

La Grande Vadrouille	17.1	39.8	
Les enfoires	16.9	43.0	
Le Journal	16.9	38.4	
Juste cause	16.3	35.1	
L'Instit	16.0	35.5	
Une sirene dans la nuit	15.6	38.0	
La petite Fille en costume marin	15.4	31.6	
Piege de Cristal	15.0	34.6	
La Kine	15.0	31.3	
La Rivale	14.4	33.0	
Impitoyable	14.2	33.4	
Le Plus Grand Cabaret du monde	14.0	36.2	
Crocodile Dundee	14.0	31.2	
Babe	14.0	30.0	

: Quid 2001

3 가

가 . France2  
 가 . , La Bicyclette bleue, La  
 Trilogie marseillaise, Sana famille 가 ,

. France2 2000

1

(2) France 3

France3가

. CSA France3가

France3

“A toi l'Actua” 가

. France3

2

. France3

## &lt; -47&gt; France 3

Actualites regionales	17.2	50.1	
Rendez-vous de l'informaion	17.1	43.7	
19-20 Edition speciale France 3	16.7	45.5	
UEFA (Parme Marseille)	16.0	38.6	
La Femme du boulanger	15.0	33.9	
Les Betises de M. Pierre	14.2	32.9	
Pour le rire et le milleur	13.8	31.2	
Les Grandes Geueles	13.6	33.6	
Qui mange qui	13.3	32.6	
Question pour un champion	13.0	26.4	Jeu
Le Journal de jurnaux	12.2	36.3	
L'Expert	12.1	28.3	
19-20 Editions locales	12.0	40.0	
Question pour champion	12.0	26.5	Jeu

: Quid 2001

## (3) La Cinquieme

la Cinquieme , 2000

가 .

75%

가  
 , 가 1, 3 가

Cinquieme 가 . la  
 2  
 1800

< -48> La Cinquieme

Le Mondes des animaux	3.2	11.7	
La Tulipe noire	3.0	13.8	
Couples legendaires du 20e	2.9	10.1	
Daktari	2.8	9.7	
Les Trois Mousquetaires-Hunebelle	2.5	18.4	
Le gorille vous salue bien	2.5	14.7	
Allez France	2.5	13.1	
Le Sens de l'histoire	2.5	11.7	
Lonely Planet	2.5	8.8	
Le Fugitif	2.5	7.8	
Flic story	2.3	17.2	
Casque d'or	2.3	14.7	
Un drôle de paroisien	2.3	14.6	
Classe tous risques	2.3	14.6	
Decouverte	2.3	8.8	

: Quid 2001

가 La Cinqieme 가  
 가 24 , . 9 8 2002 가  
 La Cinqieme 가  
 , , 가 , , ,  
 , , ( )  
 , 26 가

(4) TF 1  
 TF 1 7 ; , , ,  
 , / , . 1998 ,  
 (29%), , / (24%), (17%)

TF 1 ,  
 2000 100 91  
 . 2000 TF 1

2000  
 가 가  
 , "20 " "  
 2000"

&lt; -49&gt; TF1

( )	27	79.6	
20	26.3	61.7	
Remise de la coupe	24.5	74.9	
Julie Lescaut	22.7	51.6	
Pretty Woman	21.8	47.3	
Les Cordier juge et flic	21.7	50.3	
(animal Angleterrecrêts)	21.6	48.5	
Le fugitif	21.5	47.8	
Navarro	21.4	51.3	
( )	21.3	48.5	
Une femme d'honneur	20.8	50.2	
2000	20.3	51.4	
Les Visiteurs	20.3	47.8	
Didier	19.9	48.1	
Inspecteur Labavure	19.8	44.1	
Fugue en re	19.4	41.7	
TF1 3	19.3	63.3	
	19.0	45.8	
Goldeneye	19.0	42.1	
Le Pere de la mariee	18.8	41.1	

: Quid 2001

(5) Canal Plus

Canal+

< -50> Canal+

Les Guignols de l'information	7.0	15.7	
L'Annee du zapping	6.0	20.5	
La Semaine des guignols	6.0	20.1	
Ca cartoon	5.0	10.6	
Le Vrai Journal	4.9	20.0	
Cloture du festival de Cannes	4.5	17.4	
La Nuit des Cesars	4.5	11.5	

: Quid 2001

(6) Arte

Arte

Arte

가  
Arte

&lt; -51&gt; Arte

Quai des Orfevres	5.4	10.1	
Little Big Man	5.0	11.4	
Voleurs d'enfance	4.8	10.0	
Salomen et la Reine de Saba	4.8	9.6	
Les Compagnons de la Nouba	4.7	9.0	
Les Grandes Familles	4.6	9.1	
Livreurs sachant livrer	4.4	8.8	
Dalida, le grand voyage	4.3	8.6	
Mort d'une jeune fille	4.1	7.7	
Ma vien en rose	3.9	8.3	
Les Mercredis de'hitoire	4.0	7.8	
L'Enigme des Nascas	3.8	9.0	
Shenyang le nouveau critique	3.5	9.1	
Les Secrets de la grande muraille	3.5	8.1	
La Femme d'a cote	3.5	7.6	

: Quid 2001

•

1.

1)

(1)

가.

1997 2 가

1997 11

1998 1999 , , 가 ‘

(ATSC) (DVB-T)

1998 9 TV ,

1999 2 ‘ , 1999

7 5 ‘ TV ,

2000 3 가

TV 2000 7 , , , ,

TV

2000 12 ‘ TV

TV  
 가 2000 12 ' TV  
 TV 2001  
 1 HDTV  
 10 TV  
 TV TV  
 가 , 9 1  
 가 TV  
 1 6MHz  
 HDTV  
 1 가  
 가 (ATSC) TV 가  
 2001 , 가 , 가  
 (2) , TV  
 TV 가  
 2001  
 '2  
 가 가 ,  
 가  
 TV

2)

(1)

5 1999 12  
2000 1 . ,

EBS

< - 1 >

2000 3 .

가 .

가 가

27

, 가 , , ,

( 27 ),

( 92 ).

27 ),

( 92 ).

< - 1 >

	9 ( , , 3 )	9 ( , , 3 )
	<p> , , 3</p> <p>KBS, MBC, EBS</p> <p>TV 가</p> <p>,</p>	
	<p>TV,</p> <p>PP</p> <p>PP ( , . )</p> <p>SO 6/ 100</p> <p>PP</p>	<p>,</p> <p>PP</p> <p>PP</p> <p>5/ 100</p>
	<p>· SO : , , 33%</p> <p>· PP : , 100%, 33%</p> <p>( , , PP )</p> <p>· : , , 33%</p>	<p>· SO, PP , ,</p> <p>33%</p>

(2)

TV 가 . 1999 1

SO, PP NO  
- SO PP 1/5 , PP SO 1/10 , NO SO 1/10  
가

SO  
- 1/10 , 1/2  
- , SO 가 33% 155)

PP  
- 가 ( )  
- 1/5  
- PP 15% 33% ( )

NO  
-  
- 33% 가

, 2000

, 가  
, 1 ( ) 30% ( , KBS MB

155) 가  
100 33 8 4  
30  
93.26% 8 2001 2 2000 5  
TV 2001 6 2001 3  
97.8%

248

EBS, ).  
 가 . ,  
 (PP ) 30%  
 ( , KBS MBC , ).  
 TV . 가 PP  
 33% 100% ( ).  
 , , 33% .  
 TV . PP가 SO  
 1/10 1/5 . SO 1/  
 1/5 , 1/2 33%  
 PP 1/5 33% .  
 < -2> .

< -2> ( 8 )

			SO	PP	NO
( 가)		33%			
( 가)			33%		
SO ( 가)			-MSO : 33% 1/5	1/5	
PP ( )			1/5	-MPP : 33%	
NO( )			1/10		

(3) 가  
 가 2000 3 2001 10 가  
 < -3>

38 SO , 1 SO

가

가

.156) 가

< -3> 가 (2000.3 2001.10)

2000	5	15 TV	가 1999	5
	5, 8	77 SO 가	1998 가	
	9	FM 가 ( MBC, MBC, FM )		

156) YTN MBN 3 2001 5  
 25 , 6 23 가 가  
 "KBS" , 가 YTN 가  
 " KBS가  
 KBS KBS가 6 23 "  
 " ( , 2001.6.25.)

< -3 >

2000	10		1999 11	
	12	KDB		300
2001	3	3 ( , , )	2000 가	50
	4	38 SO	1999 2 가 SO	1
	4	KBS-2R FM 6 가 ( , , , )		
	10			

가.

2000

가  
 2000 5 18 1 ' ' 2 '가 ' 3  
 가 ' 1.2  
 2000 8 30 3 10 20 ' 가  
 가 ' ,

2 가

3 가

가 2001 1 31 . 12 가 2001 3 31 ‘ , ‘ ‘ ‘ ‘ ‘ 3

2 3

TV 가 2 26

2001 3 30

53

PP

“

PP

”

“

”

가 3

SO

, TV

PP

1999 가 ‘ TV ‘

PP 가 2000 5 2 15

(PP)

가

1 가  
 3 27 가 15 PP <  
 -4> .

< -4> 15 PP

	PP			
	가		2000.9.1	
	SBS		2000.9.3	2000.9.1
			2000.11.1	2000.10.1
	MBNS		2000.10.1	2000.11.11
( )	TV	( 1 )	2000.9.1	2000.8.1
			2000.8.15	2000.7.24
	TV		2000.10.1	2000.10.1
	NTN		2000.9.1	2000.11.1
.	e-		2000.9.1	2000.10.1
.	TV		2000.1.20	2000.10.20
( )	TV		2000.12.1	2000.12.11
	F		2000.6.1	2000.6.1
( )	DIY		2001.3.1	-
	LOOKTV		2000.10.1	2000.9.1
	WEN-TV		2000.10.1	2000.10.1

: 21(2000.6, p46), 21(2000.11, p11), TV .

TV 가  
 . 2001 5 9 65  
 151 ( 74 , 77 ) PP  
 59 145 ( 68 , 77 )  
 가

, MSP , SO  
 가 ,  
 1 PP가  
 .  
 가  
 1991 가 1994  
 2000 90% 가  
 . 1995 . . .  
 가 , 1997 . . .  
 가 . 8  
 ,  
 1996 IMF  
 가 1999  
 11 16 .  
 .  
 2000 10 13 (가 )  
 . 160 SBS 가 80% ,  
 20% .  
 , 2001 4 ‘ 가 ’  
 , 10 (가 , . )  
 . ( )  
 ( ) 30 .  
 가 가  
 30 가  
 . 140 ( ) 11  
 5 16 . ( ) ( )  
 ( : ) 42 .

. 38 SO  
 (1999 2 )  
 , (9 3 , 7 2 )  
 . 1 SO  
 1 , 2 SO 2 6  
 . 2000 12 SO  
 . 1 SO 1  
 . 53 43  
 54 가 . 2001 4 38  
 .  
 SO가 SO .

(4)

가.

2001 3  
 50  
 ;  
 . : 100 10  
 . : 100 30  
 . : 100 50  
 ,  
 , 2001 3 , 100 50

(71

57 )

가

. < -5> 2001 3

4% ,

4%

20001 3

(57 )

< -5>

			20%
			50%
			75%
			70%
			96%
		KBS, MBC	55%
			58%
			60%
			96%
		40%	

: ( , 2001.3)

(69 )

2000 10 1 72%, 75% .

KBS MBC  
SBS 80%  
( , , , )

1991 (72 )  
가 가

100 40 가  
1991

1994  
< -6> 1991

B C ,

&lt; -6 &gt;

:

( : %)

		KBS-1	KBS-2	MBC	SBS
'91		3	3	3	3
		4.3	3.3	3.7	-
	가	3.9	4.8	5.7	6.5
'92		4	5	5	5
		4.8	6.4	6.7	9.0
	가	5.0	8.2	9.3	10.2
'93		7	10	10	10
		7.4	11.0	10.0	10.2
	가	8.0	11.1	11.1	11.6
'94		10 (4)	13 (4)	13 (4)	13 (4)
	가	13 (5)	15 (5)	15 (5)	15 (5)
		6.9(3.8)	16.9(4.2)	13.0(5.3)	13.9(4.7)
	가	9.5(3.3)	19.2(4.7)	15.1(5.3)	17.7(9.4)
'95		13 (5)	15 (5)	15 (5)	15 (5)
		12.1(4.6)	18.7(5.7)	16.6(7.3)	15.6(8.5)
	가	9.9(3.6)	21.9(7.9)	16.3(6.8)	15.7(6.2)
'96		14.2(6.6)	23.4(10.9)	16.6(5.8)	17.2(6.6)
		16 (8)	18 (8)	18 (8)	18 (8)
	가	15.2(6.8)	29.4(17.7)	18(8.3)	19.9(9.7)
'97		19 (9)	19 (9)	19 (9)	19 (9)
	가	20 (12)	20 (12)	20 (12)	20 (12)
		15.7(7.1)	26(15.8)	19.2(9.1)	20.9(11.2)
	가	16.7(6.1)	26.3(18.1)	20.1(12.0)	23.2(12.5)
'98		20	20	20	20
		12.5(3.8)	28.1(20.3)	20.2(12.8)	20.5(14.8)
	가	9.9(5.4)	30.3(23.0)	21.0(14.0)	20.9(14.9)
'99		20 (16)	20 (16)	20 (16)	20 (16)
	가	20 (18)	20 (18)	20 (18)	20 (18)
		--	--	--	--
2000	가	--	--	--	--
		--	--	--	--
2001		27 (11)	27 (11)	27 (11)	27 (11)
	가	31 (13)	31 (13)	31 (13)	31 (13)
		--	--	--	--
	가	--	--	--	--

2000

. < -7> 가 2000 2001

.

< -7> : 2000 2001

		2000 (가 )	2001. 5.1 2001. 9. 30	2001. 10.1
	가	27/ 100	29/ 100	31/ 100
	가	22/ 100	24/ 100	26/ 100
	SBS	4/ 100	4/ 100	4/ 100
		100 18		
		100 6	100 8	

1998 7

. < -8>

< -8>

			&	2000	2001
	1998	1999			
KBS, MBC	25% (50 )	35%	30-50%	40%	45%
KBS MBC	15% (30 )	25%		35%	42%
	30%	30%	40-60%	40%	40%

3)

가

( ,1998. 1

가

가

가

가

1998

TV

1998

TV

197.5

TV PP

TV

가 1998 10

(1999. 2. 8 )

. 1999

500

20 ,

50

1999

30

TV

45

260

(1)

1997  
 (5 ) 32 2 SO 가 (24) 197.5  
 , 1999 45 가 274.5  
 1 10 2 , 4.5%  
 1 6 2 2 ,  
 5.5% .  
 1997 가 2001 10  
 7 277 623.3 , 2.25  
 . 99 1 197.5 623.3  
 가 . 1999 2001 10 11  
 45 . 1 4.5 .

(2)

‘ 33 ’ 99 9  
 , 1,700 , ( )  
 .  
 < -9> .  
 . 2 , 2  
 3.5% , 1 10 . 1999 4  
 20 , 2000 12 50 , 2001 40 80  
 . 3 30 150 ,  
 5 .

< -9 >

	1999	2000	2001	
	53	62	70	,
2 SO	83	40	40	2 SO

(3) 157)

( )

가

36

38

가

가

( 37 ) ;

6%

가

5.5% ,

22 1

3.67%

157) , “ : ” ,  
 , 2001.5.

6% 가

100 15

가, ,

2000

1,708

가 1,251 .

2000

982

268

2001

< - 10 > . 2000

. 2001 , ,

SO,

< - 10 >

(2000 )

( : )

	( )	16,566	2000 1 3
	( )	43,976	
		7,600	4
	PP	6,156	(5600 ) 13 PP 5
	( ) ,	1,447	
		396	
		170,846	가 : 125,060

: , “ : ” , , 2001.5.

2000  
 < - 11> 가  
 2000 143 , 2001 172  
 가 , 가

< - 11> 2000

( : )

				(%) (= / )	
1.	-	104	66	63.7	
2.	-	75,625	73,239	96.8	
○	4	28,561	28,504	99.8	
○	4	5,512	5,046	91.6	
○	3	9,975	9,645	96.7	
○	5	10,579	9,803	92.7	
○	15	19,998	19,610	98.1	
○	34	1,000	630	63.0	6 가
3.	-	17,246	14,921	86.5	
4.	-	10,000	10,000	100.0	
5.	-	4,035	26,833	665.1	
	-	107,009	125,060	116.9	

(4)

1998 10

가 ,

2000 10

가 ,

가 2001 2002

2001 15

, 2002 50

4)

(1)

1997 (ATSC)

(DVB-T) (ATSC)

ATSC 8-VSB가 , DVB-T COFDM

COFDM HDTV 가

SDTV ATSC

( 가 10

). COFDM 가 , 가

ATSC 가 ,

가 .158)  
 DVB-S . SI  
 (Service Information) DVB 가,  
 2000 DVB-SI .159)  
 2001 3  
 ATSC DASE, DVB MHP  
 가 TV  
 , 가  
 . TV  
 , .

< - 12 >

TV	TV	ATSC	MPEG-2	AC-3( )	8-VSB
		DVB-S	MPEG-2	MPEG-2	QPSK
	TV	ATSC-DASE			
		DVB-MHP			

TV . DVB ATSC  
 SI . SI가  
 , .  
 . DVB SI  
 가  
 , SI가 A/V 가

158) , , 2001.7.15.

159) SI 가 , 가

EPG , .

Dolby AC-3 . DVB MPEG ATSC  
 가 ,  
 가 가 .  
 가  
 .160)  
 TV  
 가 . TV  
 . 70 130  
 ( )  
 (KDB) 10 ( 3 4 )  
 . 2002 ‘ , ’  
 가 가  
 ‘ ’ 가 ,  
 RCA, 가  
 TV  
 .161)

(2) MBC  
 3 2000 8 31 SBS가  
 KBS MBC 9 3 .162) TV  
 가 (ATSC)  
 MBC

---

160) . , “ ”, , 4  
 2 , 1999 6 .  
 161) , 2001.10.15.  
 162) 2000.9.2.

1997 ' 가  
TV

가  
(DVB-T)

MBC

3 가 KBS SBS MBC 2001  
4 6 9  
가 10 'DTV  
10

. MBC가

MBC 2001 6 KBS  
163)  
가

가 MBC 2001 8  
가 11 30

2.

TV가 5 가

---

163) 가

TV 가 . 2000  
 (KDB) 2002  
 , HDTV  
 가 . SDTV 6MHz  
 가 , 가

1)

.(< -13> )  
 1995 2 3766 2000 4 757 가  
 10.7% 가 . 1995 TV 1996  
 . 2000  
 78%, TV가 16%, 6%  
 . 1995 87% . < -13>  
 3 1995 80.1%  
 2000 65.6% .  
 , 3  
 3  
 1 100 50  
 , 3 가 100 75

< - 13 >

( : )

		1995	1996	1997	1998	1999	2000
V	3	1,9552	2,1858	2,2112	1,6065	2,0782	2,6601
		366	472	686	608	488	814
		452	1006	1,60	878	1443	2319
		1074	1384	1681	1393	1472	2730
		2,1009	2,4055	2,4864	1,8284	2,4167	3,1651
T	SO	-	857	1600	1772	1951	2747
	PP	-	1819	1555	1581	1731	3024
	NO	-	139	331	381	334	544
		-	2814	3482	3958	4430	7217
		-	2605	3117	3609	4013	6523
		2757	2385	2383	2654	2646	2357
		2,3766	2,9254	3,0729	2,4896	3,1261	4,1225
		2,3766	2,9,045	30,483	2,4547	3,0844	4,0757
3	(%)	82.3	75.3	72.9	65.4	67.4	65.3

1 : 3 KBS, MBC, MBC SBS가 3  
 MBC 가  
 2 : PP  
 3 : TV PP SO  
 NO PP NO가  
 : (2001),  
 (2001), NO (2001)

1998 1999  
 , 2000 2 5201 IMF 1997  
 6130 (< - 14 > ). 가  
 1997 93.3% , 2000  
 92% KBS, MBC, SBS가  
 3 1997 86% ,  
 2000 80.9%

TV

1997 6.7% 2000 8.0% 가

< - 14 >

	( )				(%)			
	'97	'98	'99	'00	'97	'98	'99	'00
	19,071	12,655	17,999	25,201	100.0	100.0	100.0	100.0
	17,791	11,628	16,669	23,179	93.3	91.9	92.6	92.0
KBS	12,870	8,472	11,684	15,812	67.5	66.9	64.9	62.7
MBC	5,699	3,359	4,873	6,723	29.9	26.5	27.1	26.7
EBS	4,155	3,086	4,095	5,478	21.8	24.4	22.7	21.7
MBC	24	43	65	164	0.1	0.3	0.4	0.7
	2,991	1,984	2,651	3,447	15.7	15.7	14.7	13.7
SBS	4,420	2,915	4,605	6,705	23.2	23.0	25.6	26.6
PSB	3,550	2,254	3,465	4,744	18.6	17.8	19.3	18.8
TBC	282	131	213	370	1.5	1.0	1.2	1.5
KBC	228	108	168	288	1.2	0.9	0.9	1.1
TJB	135	84	167	270	0.7	0.7	0.9	1.1
ITV	130	79	134	204	0.7	0.6	0.7	0.8
ITV	31	81	152	313	0.2	0.6	0.8	1.2
UBC	29	62	104	164	0.2	0.5	0.6	0.7
JTV	20	59	99	160	0.1	0.5	0.5	0.6
CJB	14	48	87	157	0.1	0.4	0.5	0.6
KFM	0.88	9	16	34	0.0	0.1	0.1	0.1
CBS	501	241	381	661	2.6	1.9	2.1	2.6
BBS	275	145	230	367	1.4	1.1	1.3	1.5
PBC	108	42	72	135	0.6	0.3	0.4	0.5
FEBC	90	40	58	115	0.5	0.3	0.3	0.5
WBS	29	14	21	37	0.2	0.1	0.1	0.1
	0	0	0.41	7	0.0	0.0	0.0	0.0
	73	82	143	272	0.4	0.6	0.8	1.1
	1,207	945	1,187	1,751	6.3	7.5	6.6	6.9

: (2001, 11 ),

1996 19,596 2000 12 21,741  
5 1.1% 가 . 1997- 1998 IMF  
1998  
, 가  
,164)  
1996  
13,828 2000 13,361 4% .  
KBS, MBC, SBS 3 . 96 2000  
3 10.3% ,  
89% 15% 가  
. 가 97 ( )  
, , , , 2 , 98 ,  
. TV 96 5,768 2000 8,380 45.3%  
가 . TV 가  
가 가 2000 180 1997 2  
가 . 가 가 가 5 16%  
가 가  
. 가 1998 24 2 SO ( )  
77 ) , SO (38 )

---

164) , “ 가”, 21, 2001 10 .

< - 15 > (1996-2000)

		1996	1997	1998	1999	2000.12
	4	12,067	12,741	10,165	10,584	10,827
		674	677	1,134	1,159	1,277
		1,087	1,118	1,095	1,187	1,257
		13,828	14,536	12,394	12,930	13,361
T V		1,805	2,082	2,164	2,871	3,327
		3,963	4,044	3,556	3,665	5,053
		5,768	6,126	5,720	6,536	8,380
	-	-	-	-	-	(1,750*)
		19,596	20,662	18,114	19,466	21,741 (23,491)

:  
 2001  
 : (2001, 12),

(PP) 96 3,963 2000 5,053  
 27.5% 가 . 2000 37.9% 가 . 2000  
 가 15 PP 가 .  
 PP 가 .

.  
 .

. 1958 1972 TV  
 TV  
 TV TV 가 TV TV  
 1999 TV TV

52%  
 59,890 1994 65,585 , 1999 71,618 가 198  
 가 .

NHK 가  
 , 가 .  
 가 .  
 1994 12,146 1999 20,812 가 .  
 2)

2000 . TV  
 2001 4 30 1 SO 38 가  
 . SO가 . 2 SO 2002  
 10 . KDB가  
 2000 12 , 2001 3 . 2001  
 PP 가 2001 6 81 가 191  
 . PP 가 MPP 가 가 . 7  
 가 21 . 2002 SO PP 가  
 , PP가 가 . 2001 9  
 . 3  
 , 가

(1) 3  
 .  
 3 가 ,  
 .  
 33%

KBS MBC  
 .  
 KDB 3 가 17% (KBS 10%, MBC 6%, SBS 1%)

PP 11 (KBS 3 , MBC 3 , SBS 3 , EBS 2 ) ,

, (PP)가  
 ,  
 ,  
 . ,  
 ,  
 가 .

(2) MSO, MPP MSP

SO 1 SO 53 1997 가 2 SO  
 77 SO가 . 1999  
 MSO가 . MSO가 .(< -16> )

< -16> MSO

	SO
C&M	, , , , , , , , , , ,
	, , , , , , ,
	, , , , , , ,
ON MEDIA	, , , , ,
	WEB TV,
	, ,
	, ,
	,

: 21. 2001. 4.

1999 MPP , IMF PP  
 . MPP가 .  
 PP 가 MPP .(< -17>  
 ) 2001 4 MPP 7 가 21  
 PP 44 가 . MPP  
 , SO

< -17> MPP

	PP
ON MEDIA	OCN, OCN ACTION, HBO, , TV, , MTV KOREA(KMTV)
	m · net, CJ39 , F, LOOK TV,
SBS	SBS , SBS 44, SBS
MBC	, geMBC,
	MBN, MBNS
	TV,
TV	NTV, TODAY
TV	CTN, TV

: 21. 2001. 4

MBC가 3 , SBS가 3 , KBS가 3 PP  
 . PP SO MSP 3 11 PP  
 SO . (< -18> )

< - 18 > MSP

MSP	PP	SO
ON MEDIA	OCN, TV, HBO,	, , , ,
	m · net, CJ 39 , F	, ,
	e-	, ,

: 21. 2001. 4

MSP , PP ,  
 PP . MPP P  
 . PP  
 . MPP PP ;

- : OCN, , , , MTV 5
- CJ · MBC : M.net, F, NTV, MBC , MBC ,  
 G@MBC, YTN, 8
- SBS : SBS , SBS , SBS , TV, TV,  
 KMTV, TV, TV 8

, , MSP  
 , SO PP  
 가 . ,  
 , 가

(3) SO  
 SO (38 ) SO SO  
 . SO 2001 8  
 . 500 2,000 , 가  
 가 ( 17,000 ) 가 .  
 가 5000 가 SO

, 5000 가 PP PP  
 SO가 SO  
 가 1가 3,650 가( )가 , 가  
 TV 가 . PP 가 가  
 , SO가 PP  
 .  
 SO, SO  
 77 SO 26 가 SO 80% .  
 600 .  
 가 .  
 가 .  
 6 .

(4)

SMATV(Satellite Master Antenna TV)

. SMATV ,  
 , , STB 가 가  
 가 가  
 ,  
 . 20 30% 가 DTH  
 가 SMATV SO  
 , MA

, MA  
 . SMATV  
 , SCN .165)  
 , KDB . MA  
 , MA 가  
 . MA 가  
 . 가 MA  
 가 . SAMTV  
 .166)  
 가 . SMATV  
 , SMATV 가  
 . , MA , ,  
 . 가 .

(5) TV  
 MBC SBS KDB  
 . KBS EBS  
 MBC SBS가 . MB  
 . SBS 가 .  
 가 가  
 MBC SBS MBC  
 가 . , ,

---

165) TV , "SMATV TV ", ,  
 , 2001.10.26.  
 166) , " SMATV ,  
 " , ,  
 2001 10 26 .

가

가

MBC SBS

가

TV 가

80%

MBC SBS

가

가

가

가

(6)

15%

33%

가

SO

. 2000 7 C&M

1

. 2000 7

130

. 2001 3

SO

(< - 19 > ).

< -19> SO

SO	
	<ul style="list-style-type: none"> <li>· : 10</li> <li>· : 14.4%</li> </ul>
	<ul style="list-style-type: none"> <li>· : AIF-MSO Inc.( AIG )</li> <li>· : 220 ( 2000 ) CB</li> <li>· : CB( )</li> <li>· : 30.9%</li> </ul>

: (2001, 12 )

(< -20> ).

2000 5 Capital Group International 5,000  
 , 2000 9 TV OCN  
 HBO 1,25  
 HBO  
 (50.5%), (33%), (16.5%) ,  
 가 50% TBS(Tern  
 Broadcast System) 17.4% ,  
 Columbia Tristar, Warner Bros., Disney, Fox, Universa Pa  
 output deal .  
 MPP  
 TV 1997 10  
 CCAL AFIC 5000 1,000  
 . m · net 1999 1 3 Viacom MTV  
 2 . LG

< -20> PP

( )	NTV, m-net	MTV ASIA	2.25%
( )	CJ 39	CITICORP Capital Asia LTD	6.84%
( )	HBO, OCN	TWE	33.0%
( )		TBS Korea Inc.	20.29%
( )LG	LG	Zurich Scudder Invest Morgan Stanley Dean Witter Inv.	7.01% 6.15%

: (2001, 12 )

3)

1999 927  
 3.0% , 12  
 0.04% . (146  
 (329 ) 가 .

(1)

. 가 . 1992  
 1995 TV가  
 . 1999 3 24.4%  
 . 3 4,178 (60 ) 787  
 , (1 5,489 ) 5.1% .  
 가 . EBS 1999 1,1  
 64 , (511 ) 12.5%  
 MBC 1999 216 2.3

(4,561 ) 0.05%

81.3% 91.2%

TV

. YTN, , TV, 39 , LG , OCN

TV 50%

1999 63.7% , 9.6%

, 26.7%

1999 4

33 , (2,103 ) 1.6%

1999

887 3 920

2.9%

(2)

가

가

가

가 17

65%

가

3

3

KBS MBC

. KBS MBC

KBS가

MBC

3

90%

27 4 437

11 1,280

가 가

YTN

가

가

(3)

가

가

3

. KBS

, MBC

SBS

. EBS,

1994

TV가

가 350 가

1 6

199

가

2

IMK,

2000 5

(www.kocoba.com)

. 2000 8

(www.ncww.net)

4)

'96 19.0% 0 가 .  
 '96 8.3%, '97 38.7%, '98 20.4%, '99  
 27.0% , 가 .  
 '00 2.9% 가  
 .167) (< -21 > ) '96 가 가 IMF  
 , '98 97 52.8% . '99  
 '99 6.2%, '00 1.3%  
 가 . '96 1:10.6, '97 1:6.9, '98  
 1:2.7, '99 1:2.3, '00 1:2.2

4 EBS 가  
 가 , TV

---

167)

(18:00-22:00) 15%

3 (城)  
 가

25%

2001.2.21)

< - 21 >

(1994-2000)

( : )

					TV .			
				가 (%)		가 (%)		가 (%)
	A	B	A+B					
1994	3,061	2,629	5,690		-		5,690	
1995	2,261	3,209	5,470	-3.8	66	0.0	5,536	-3.0
1996	-	-	5,384	-1.5	612	827.2	5,996	8.3
1997	-	-	6,967	29.4	1,351	120.7	8,318	38.7
1998	4,608	3,148	7,756	11.3	2,261	67.4	10,017	20.4
1999	5,715	5,121	10,836	39.7	1,900	-16.0	12,736	27.1
2000	5,738	5,926	11,664	7.6	1,447	-23.8	13,111	2.9
1994	19,861				10,649		30,510	
1995	26,043			31.1	16,775	57.5	42,818	40.3
1996	34,267			31.5	29,637	76.6	63,904	49.3
1997	38,893			13.5	18,385	-37.9	57,278	-10.4
1998	15,386			-60.4	11,650	-36.6	27,036	-52.8
1999	20,094			30.6	8,639	-25.8	28,732	6.2
2000	26,743			33.0	2,350	-72.8	29,093	1.3

) A : , B :  
: (2001), [ ], (<http://www.mct.go.kr>)

, 가 가 ,  
, 2000 가 .  
'98 55.0% '99 48.0%, '99 37.0%  
가 .  
가 '98 77.2%, '99 72.1%, '00 74.5%  
. 가 '98 8.7%, '99 9.9%, '00 11.1%

286

가 ,

가

'00

71.9%가

41.1%,

13.5%, 8.4%

가

'00

75.0%

, 2000

10,836

11,664

7.6%

가

TV .

1,900

1,447

23.8%가

2000

33%가

가 26,743 ,

TV

72.8%가

2,350

가

가가

2000

1,500

'98 300

, '99

600

가

가

가 '98

1,300

'00

690

가가

3

가

가

가

가 가

(cultural discount)

가

가 '98

3,100

, '99

3,200

, '00

1,360

가 '98

25,700

'00

57,200

2

가가

3.

1)

(1) 3 (MBC )

가.

2000 3 (MBC ) 2 2662  
 4 792 56% . 1992 3  
 9,122 , 8 11.4% 가 .  
 가 가 9.3%  
 가 KBS가 9.7%, MBC가 10.4%, S  
 가 18.3% SBS . NHK  
 BBC 가 , 1990 1998 NHK가 3.3%, 1992 2000  
 가 6.9% .

3 . IMF

1998

. 2000 3 2402 ,

10.6%, 17.0% .

. 2000

-5.80%, 4.2% .

NHK BBC

3 < -22> . 3

1 IMF MBC가 가 IMF SBS가

KBS 1

가 . KBS

NHK BBC  
KBS 1 BBC NHK 1/3

< -22 >

( : , , , %)

		1990	1992	1994	1996	1998	2000
	KBS	432,949	533,927	656,263	997,986	774,117	1,157,996
	MBC	203,761	260,494	315,931	442,224	344,242	600,958
	SBS	-	117,732	247,873	383,316	245,718	507,213
	NHK	488,466	539,824	568,152	596,192	633,712	-
	BBC	-	1828.8	2108.5	2334.5	2847.2	3164.5
	KBS	5,338	2,984	3,097	77,579	-57,975	100,262
	MBC	28,336	15,010	18,827	25,548	-18,702	69,314
	SBS	-	9,891	18,570	28,766	-27,003	70,621
	NHK	36,599	32,385	15,273	2,239	16,754	-
	BBC	-	-27	93.2	31.3	-	-
	KBS	1.23	0.56	0.47	7.77	-7.49	8.66
	MBC	13.91	5.76	5.96	5.78	-5.43	11.53
	SBS	-	8.40	7.49	7.50	-10.99	13.92
	NHK	7.49	6.00	2.69	0.38	2.64	-
	BBC	-	-1.5	4.4	1.3	-	-
	KBS	2.42	1.19	1.58	35.06	-26.44	21.01
	MBC	18.31	8.16	9.10	9.71	-6.89	8.43
	SBS	-	10.21	14.72	16.29	-17.90	21.32
	NHK	0.02	0.03	0.02	0.01	0.02	-
	BBC	-	-3.2	10.6	-	-	-

1) = / × 100

2) 가 = / × 100

:

3 1 MBC가 가 KBS가 가 ,  
SBS가 . 3 1 NHK BBC  
(1999  
) , 3.1 , 2.5

3 1 가가 SBS가 가 MBS가 , KBS  
 . 가가  
SBS가 가 , MBC가  
KBS가 가 . KBS MBC  
 . 2000

MBC  
가가 가 . MBC 가가 가  
가가 가 가

3 , , 가  
< -24> . KBS가 가 ,  
MBC, SBS . 3 1990  
SBS 2000  
 . KBS NHK BBC

3 SBS가 가 KBS가 가 MBC가  
 . 3  
 . 3 1990 가  
 . BBC 가 가  
 , NHK 40%



( : %)

		1990	1992	1994	1996	1998	2000
	KBS	45	41	44	42	44	39
	MBC	43	33	35	30	28	23
	SBS	-	22	23	27	25	17
	NHK	41	38	36	33	33	-
	BBC	-	33	35	33	34	34
	KBS	13	16	17	20	19	22
	MBC	29	30	30	28	32	25
	SBS	-	27	30	30	37	42
	NHK	33	36	39	41	42	-
	BBC	-	41	44	48	62	59
가	KBS	6	5	4	6	10	7
	MBC	4	3	3	3	4	2
	SBS	-	9	6	6	5	5
	NHK	9	9	9	9	9	-
	BBC	( )					
	KBS	35	38	35	32	28	32
	MBC	24	34	32	38	36	49
	SBS	-	41	41	37	34	36
	NHK	17	17	17	17	17	-
	BBC	-	21	21	19	5	7

10 3 < -25> KBS  
 MBC 가  
 . < -25> 3 10 가  
 가 KBS MBC  
 가

( : %)

		1990		1995		1997		1998		1999		2000	
	KBS	54.6	26.4	58.0	29.6	55.1	31.7	44.6	33.8	65.6	35.0	57.8	34.5
	MBC	53.9	36.9	47.9	39.6	56.7	45.1	54.4	45.6	50.0	49.3	54.4	47.6
	SBS	52.6	-	66.0	-	65.0	-	56.5	-	50.3	-	57.5	-
	KBS	19.4	26.6	21.4	29.0	18.4	26.6	18.2	24.9	14.8	22.7	18.4	22.0
	MBC	29.3	32.5	27.5	31.7	18.5	24.9	13.3	25.1	17.2	23.2	17.6	27.3
	SBS	22.4	-	13.5	-	15.3	-	21.5	-	24.3	-	24.3	-
	KBS	17.2	18.7	16.6	25.7	15.1	29.0	14.9	24.7	14.1	28.9	13.3	34.6
	MBC	18.6	27.7	16.2	25.3	19.9	25.9	19.9	28.2	19.9	22.9	21.1	24.5
	SBS	15.8	-	17.5	-	17.5	-	-	-	9.5	-	6.8	-
	KBS	8.7	28.3	4.0	15.8	11.4	12.6	13.5	9.5	5.5	13.6	11.4	9.0
	MBC	0.2	3.0	8.5	3.4	4.9	4.2	8.5	1.6	12.9	5.2	6.9	5.0
	SBS	-	-	2.9	-	2.2	-	15.4	-	15.9	-	12.1	-

: ,

3

. 3

10

SBS

가

. SBS

, 1

, 1

가

,

가

가

SBS 1

MBC

MBC 1996

1

SBS

. MBC

. KBS 3 가  
. 3 KBS 1 , 1 가가 ,  
, 가 . KBS 가

가 .

, 가

가

3 2000 2001 3  
. < -26> KBS  
. SBS  
가 . 2000 가

3

. MBC

< -26>

	2000	2000 가	2001
KBS	- ( , )	- .	- .
MBC	-	- . , , 가 TV	-
SBS	- .	- .	- .

< -27>

1TV 2000 . KBS , . 가 2001 32.5% , 36.7% , 30.8% . KBS 2TV 1TV 가 KBS가 1TV 2TV 가 1TV 2TV 가

< -27> / /

	'00	'00가	'01	'00	'00가	'01	'00	'00가	'01
KBS1	585 32.5%	585 32.5%	585 32.5%	730 40.6%	670 37.2%	660 36.7%	485 26.9%	545 30.3%	555 30.8%
KBS2	295 16.4%	295 16.4%	295 16.4%	240 13.3%	540 30.0%	405 22.5%	1,265 70.3%	965 53.6%	1,100 61.1%
MBC	400 22.2%	400 22.2%	400 22.2%	325 18.1%	290 16.1%	345 19.2%	1,075 59.7%	1,110 61.7%	1,055 58.6%
SBS	325 18.1%	325 18.1%	325 18.1%	155 8.6%	190 10.6%	215 11.9%	1,320 73.3%	1,285 71.4%	1,260 70.0%

) - : 19:00-23:00 - . . : 18:00-23:00 :  
 1,800  
 : 2001 5 ,

MBC 2001  
 가 . SBS 가 가  
 70%가 3 가 가  
 가  
 가  
 ,  
 가  
 , 2000 가  
 (< -28>). 2001 KBS 가가  
 . MBC 2000  
 가  
 .  
 MBC 2000 가 1  
 .  
 가 24  
 가 TV .

( : )

		2000	2000 가	2001	
KBS	1TV	6,275	6,325	6,890	2001 가
	2TV	6,280	6,620	7,070	2001 가
	MBC	7,240	7,065	7,065	2000
	SBS	6,805	7,180	7,105	가 , 2001
		6,650	6,798	7,033	가

: 2001 5 ,

2000

) KBS

KBS 5 1 1TV 2TV

. 1TV 가 , , , , 2TV 가 가

. 'TV' 10

가 가

가

! ,

2TV

2TV

1TV

) MBC  
 MBC 21 , MBC가 2000 MBC  
 21 가  
 가  
 . 4 17 ±2 1  
 가 ±1  
 5 10 가

2 30 ' ' , ' ' '가 'MBC  
' e- ' ,  
' ' , ' ' ,  
TV ' , ' ' ,  
' ' ,

MBC  
KBS, MBC, SBS 가 1

MBC 1 2  
' MBC '가 12 30  
2 , ' ' 1 2  
(168) MBC 24

TV ' ' , ' ' ,  
' ' , 'MBC ' , 'MBC TV ' , 'TV  
' ' , ' ' ,  
4

) SBS  
10 SBS 가

가

---

168) , 2000.5.10.

‘ ? ’

2002

) 가  
2000

가

가

3 KBS가 ‘ , MBC ‘  
, SBS ‘ . ’

가 가 ,

2000 가

) KBS

가 1TV

. 1TV ,

,  
. 2TV , ,

,  
, ‘ 11 1TV ‘  
, ‘ , ‘ , ‘ , 2TV ‘ ,

‘TV - ‘, ‘가 ‘, ‘ , 1TV

‘ , ‘V J ’, ‘ 24 ’ 2TV  
가  
가 1TV 2TV 가 ‘TV ’,  
‘가 ’, ‘ , ‘ , ‘ ,  
. 2TV  
‘ , ‘ , .  
.169) 가  
100  
. ‘ (Public  
Access)’ 가  
가  
가  
7 4  
. ‘ ,  
가 가 KBS 가  
. ‘ - ,  
‘ , 가

) MBC  
MBC 가 KBS 가 .  


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169) , 2000.10.3.

. MBC 가

7 25 가

5

12

가

7 25

TV 가 , 5

4

MBC

6 10

7 55

6 10

7 55

MBC

) SBS

SBS 가

170)

가

(Edutainment)

가

가

가

가

가

170) , 2000.10.11.

MC

TV'가

10

30

TV -

KBS

VJ  
'VJ

VJ

SBS

3

(

, , )

가

SBS 가

가

3

) 가

KBS, MBC, SBS

3 가

,171)

가

가

2001

) KBS

KBS

.가

가

172)

1TV 2001

3 , 6

535

가

‘ , ’

‘ , ’

‘TV , ’

‘ 21 ( 2002 ) ’ . 10

4 가 .

2TV 22.5% 1,590

가 . 10 가 ,

8 가 7

가 .

‘TV - ’ ,

‘ , ’ ,

‘ , ’ ,

‘ , ’ 21, ‘ ’ 6 2TV 3

‘ , ’ ‘ , ’ , ‘ , ’

2TV

가 44.7% KBS 2TV 46.3%

1.6% , 42.8% 40.2%

KBS

가

---

172) , 2001.3.28.

KBS가

,173)

) MBC

MBC 2001

MBC

, 가

535

MBC

KBS-2TV

가

가

5 가

7

4 가

4

가

55

10

50

3

가

9

TV

가

MBC

가

7,065

가

11

9

, 가 20.3%

1,435

535 7.6%

4 30 5 20

가 .

) SBS

‘ 174)

SBS

7

10 , 1 3

가 가 .

SBS

‘ , ‘ .

가 .

‘ , 3-40 .

‘ , SBS

3 가

‘ , 가

SBS

‘ , ‘ , ‘ , ‘ , ‘ , ‘ 4

‘SBS ‘ ,

‘TV ‘ .

SBS 2001

) 가

KBS 1TV 가 565 가 6890 가

174) , 2001.4.30.

. 4 , 6

6 .

. 2TV 2000 . MBC 가 11

9 . SBS . 13

8 가

7 가 .

3 2000 , MBC SBS 2001

3 가

. MBC SBS

KBS 1999

KBS가 .

KBS 2000 12

'eKBS' . , ,

. IMT-2000 SK (

3000 1%) .

MBC 2000 3 100 iMBC ,

TV . 100 iMBC

, LG

SBS 1999 8

36 SBSi . SBSi  
 . SBSi 2000 8  
 , 3 1000  
 . SBSi  
 . 2000 3 SKC&C SBS  
 , 9  
 SBS . 10

MBC SBS  
 SBS 2000 2 TV SBS  
 . 5 SBS 9 1  
 SBS 3  
 3 가 가 MPP  
 . SBS SBS , , SBS  
 CATV .  
 MBC 2000 (CJ 39  
 , LOOK TV 2001 3  
 93.2% (46.6%) . LOOK TV  
 . ' MBC ' 4  
 , 'LOOK TV' 5 1 . 'MBC  
 ' ESPN 220 4 2

2000 가 KDB  
 , DSM KDB가 12  
 3

가 . KDB 2001 6 (PP) 1  
 49 , TV 3 가 3 9  
 .  
 KBS 10% 2 . KBS 2001 3  
 8 Sky KBS ,  
 , . 3 .  
 , KBS 1 KBS  
 1  
 2  
 .175)

2001  
 가 , SBS 2001 10 26 , KBS 11 5  
 MBC 12 2  
 (KBS 1 9, MBC 11, SBS 6. EBS 10)  
 . 2003 , 2004 , .  
 2005  
 3 가  
 ,  
 3  
 , . 2000  
 3 가 2,402 1,8  
 . 2000

(2)

TV

EBS TV TV EBS 1TV, 2TV, EB  
FM

EBS  
KBS 3% 가  
EBS 2000  
814 457 가 가  
가 KBS 가 가  
가 , 28% 가  
( < -29 > ). KBS EBS  
21%, 41% 62%

< -29 > EBS

( : , %)

1999	13,354 (29)	0	0	13,354 (29)	7,121 (16)	25,273 (55)	45,749 (100)
2000	6,837 (8)	14,300 (18)	10,055 (12)	31,192 (38)	16,796 (21)	33,375 (41)	81,363 (100)

)

:

EBS 2000 78% 가 , 22%  
가 . 1999 128  
, 2000 89 .(< -30 > )

< -30> EBS

( : )

	1999	2000	(%)
	45,748	81,363	77.8
	61,253	74,481	21.6
	- 15,505	6,883	-
	- 12,820	8,877	- 169.2

:

, 2000 EBS 434 7.96% .(<  
 -31> ) EBS가 가 75 가  
 . EBS 1999 194.5% 2000 34.2%  
 , 64.5% . 2000 가  
 160 323 100%가 가 .

< -31> EBS

( : )

	1999	2000	(%)
	47,195	43,438	- 7.96%
	31,171	11,070	- 64.48%
	16,024	32,367	101.99%

:

EBS 2001 200  
 , 1999 ,  
 930 10%

311

. EBS

가

2500

가

71

, 57%,

21%

. EBS 20001 8

15,000

VOD · AOD

9

VOD AOD

가

11

가

1

5000

EBS

3

가

EBS 1,2TV

(3)

< -32 >

. 1995

1

(

, , , ) 1997

19

가

, 1999

, 2000

50

. 1997

2

( , , , )

가 1999

, 2000

100%

. SBS

100%

&lt; -32&gt; ,

( : )

		1995	1996	1997	1998	1999	2000
		36,559	47,192	68,612	60,791	48,827	81,363
		2,455	8,304	16,644	-3,807	-12,091	8,877
		8,540	16,449	15,365	10,129	15,994	23,003
		-1,270	1,482	567	-482	3,515	5,584
				8,405	11,255	19,703	29,920
				-638	-2,186	4,504	6,281
		14,577	30,651	28,700	15,204	21,676	34,727
		-7,538	-4,249	-1,089	-5,299	1,320	4,678
		15,189	34,243	34,610	18,727	29,606	45,540
		-6,396	-3,639	-2,987	-5,659	2,782	17,105
				4,826	10,524	19,781	39,021
				-9,144	-29,216	-25,051	-15,906
				1,699	5,743	10,115	17,002
				-185	-3,435	-1,146	3,023
				2,606	7,359	11,521	17,865
				-2,372	-3,601	-1,285	3,276
				3,301	7,679	13,243	19,600
				-2,397	-2,225	2,023	2,007
		38,306	81,343	99,512	86,620	141,639	226,678
		-15,204	-6,406	-18,245	-52,103	-13,338	26,048
					1,204	2,668	4,961
					-1,249	-316	782
		31,873	40,138	41,859	26,127	37,832	52,376
		-4,844	-1,834	-1,389	-9,818	-5,422	2,713
		10,529	12,252	16,107	10,729	12,724	19,572
		-3,661	-3,536	-1,847	-1,903	106	1,688
		9,346	10,987	11,821	4,994	8,159	15,291
		-2,656	2,839	-1,203	-2,543	-2,200	1,822
		8,328	8,308	9,441	7,921	10,432	11,935
		725	1,827	3,933	8,229	9,508	4,588
		2,178	3,293	2,757	2,436	2,930	3,032
		2	33	21	1,447	963	784
		62,254	74,978	81,985	53,411	74,745	107,167
		-7,979	7,633	16,159	-8,395	-9,136	20,472
		137,119	203,513	250,109	200,822	265,211	415,208
		-20,728	9,531	14,558	-64,305	-34,565	55,397

가 가 (< -33> ).

SO , MSO

가

< -33> KBS, MBC

	KBS	MBC
	, , , , ,	, , ,
	,	
	,	,
	, ,	
	, , ,	, ,
	, ,	, ,
	, , , ,	, , ,
	25 (9 , 16 )	19

가

, KBS

MBC

KBS

5%

, MBC

10%

(< -34> < -35> ).

20%

.< -36> )

< -34> KBS 1TV ( )  
( : %)

		1997	1998	1999	2000.10	2001.
		8.9	9.8	10.6	6.4	5.5
		6.0	7.5	7.0	3.2	2.9
		5.7	6.4	5.2	2.0	2.7
		8.4	10.9	10.6	5.1	4.8
		10.3	10	9.6	4.5	5.8
		1.5	1.2	3.7	0.8	0.8
		10.6	11.8	10.6	6.3	5.5
		2.3	1.9	4.7	0.8	0.8
		1.6	1.9	4.7	0.8	0.8
		13.1	13.9	10.6	6.6	5.5
		7.7	8.5	7.7	3.9	3.6
		10.1	11.3	9.8	5.2	5.1
		2.5	3.6	3.8	0.6	0.4
		12.3	10.9	10.6	5.5	5.5
		1.6	2.9	4.7	0.8	0.8
		1.5	2.8	4.7	0.8	0.8
		11.1	11.1	9.7	5.5	5.5
		7.7	9.4	9.9	4.7	4.8

2000 : (0.1), (0.1), (0.1)  
 2001 : (0.4), (0.4), (0.4),  
 (0.4), (0.4), (0.4)

&lt; -35&gt; MBC

( : %)

		'92	'93	'94	'95	'96	'97	'98	'99	'00	
		7.2	6.8	8.0	9.7	9.6	11.3	10.4	13.3	10.8	9.68
		4.3	4.5	4.9	8.4	9.0	11.3	10.0	10.0	10.6	8.11
		5.2	5.9	7.9	9.7	9.0	10.0	10.2	12.2	10.1	8.91
		4.7	4.8	6.3	6.5	6.4	10.4	8.8	10.4	9.5	7.53
		10.8	11.0	10.0	13.7	15.0	15.6	13.5	14.2	14.6	13.16
		10.7	9.3	10.3	11.5	10.0	10.9	11.5	14.5	11.5	11.13
		5.3	4.3	6.5	6.6	8.1	9.0	10.0	12.8	8.8	7.93
		11.0	12.4	14.0	15.9	16.0	16.1	14.9	15.8	14.7	14.53
		6.7	5.8	12.6	15.3	14.4	13.5	8.5	13.1	11.5	11.27
		7.6	8.3	11.1	12.5	15.3	13.3	11.2	14.7	13.8	11.98
		13.4	14.1	12.4	18.0	19.4	21.8	16.6	17.3	16.6	16.62
		10.4	10.0	9.7	11.9	12.6	12.8	10.9	13.0	12.0	11.48
		7.8	9.2	9.9	13.0	14.0	14.5	9.9	15.3	11.7	11.70
		5.0	5.0	6.0	8.4	8.9	8.7	7.4	13.1	11.0	8.17
		8.9	9.5	10.2	11.5	12.0	11.2	10.0	12.8	13.9	11.11
		8.9	8.4	7.4	8.6	8.9	10.1	9.1	13.0	12.8	9.69
		5.6	5.2	6.4	10.6	11.6	11.7	9.5	13.2	11.2	9.44
		6.9	7.8	10.5	11.6	12.1	13.1	11.3	15.6	11.4	11.14
		8.5	8.5	10.3	11.7	12.3	12.6	9.2	13.1	11.1	10.81

< -36>

( : %)

		'97.	'97.가	'98.	'98.가	'99.	'00.	'00.12
	(TJB)	21.3	20.4	15.6	14.0	10.6	15.9	20.1
	(CJB)	-	-	-	7.5	10.5	24.7	19.7
	(TBC)	32.2	33.8	19.0	14.5	14.7	18.3	20.0
	(PSB)	37.4	38.8	19.1	16.0	17.5	20.5	29.3
	(UBC)	-	17.1	13.5	12.9	12.6	17.3	18.7
	(KBC)	25.8	25.8	16.5	13.6	11.5	17.2	23.5
	(JTV)	-	22.2	13.6	12.6	11.9	2.6	19.9
	(iTV)	-	100.0	100.0 (61.7)	100.0 (63.0)	100.0 (62.9)	100.0	100.0

) ( )

( < -37 >

< -37 >

( : %)

	KBS	MBC		
	70.9	45.3	34.6	55.9
/	0.0	3.1	5.5	2.0
	23.1	42.3	35.4	32.6
	0.2	0.0	6.3	0.9
	4.4	0.5	0.6	2.3
	1.4	8.5	13.3	5.8
	0.0	0.2	4.4	0.6

)

(4)

TV

1 1 KBS KBS 가 2001

< -38 >

		1AM(22), 2AM(6), 1FM(16), 2FM( ,1), 1FM( ,17), 2FM( ,4), 4FM(1), (2), (2), (1)			CBS AM(5),CBS FM(8), FM(5)
		AM(20) · FM(20) · FM(20)			BBS FM(5)
		EBS FM(1)			PBC FM(5)
		AM(1) · FM(1) · FM(1)			AM(1), FM(5), FM(1), AM(1)
		PSB FM(1)			WBS FM(3)
		TBC FM(1)			TBS FM(1)
		KBC FM(1)			TBN FM(7)
		TJB FM(1)			FM(2)
		iTV FM(1)			
		UBC FM(1)			
		JTV FM(1)			
		CJB FM(1)			
		FM(1)		21	194

AM , FM  
 . AM 가 ,  
 가 ( )  
 AM  
 가  
 FM 가  
 . CD , FM  
 , FM  
 AM 가 .

2)

(1)

2000 가  
 가 .(<  
 -39> ) 1 SO 1999 24 10 2000 2863  
 가 , 584 가  
 . 53 1 SO 가 ( )  
 19 . 1999 2000 2 SO 가  
 , 가 가 . 23  
 SO 가 ( ) 6 .

< -39> SO

( : )

1 SO	1996	94,044	85,668	151,528	-57,484	-109,859	
	1997	175,343	159,557	223,723	-48,380	-158,244	62.2%
	1998	187,099	177,243	220,682	-33,583	-184,972	10.5%
	1999	240,998	195,087	220,435	20,564	-164,410	9.6%
	2000	286,279	274,667	278,822	7,462	-156,948	34.2%
2 SO	1998	42,775	22,357	42,948	-1,616	-1,616	
	1999	51,681	41,420	61,450	-3,402	-5,018	61.7%
	2000	99,516	90,204	112,569	-13,057	-22,655	77.8%

: (2001),

SO 2000  
 , 가 . 1 SO  
 가 , 2 SO . (< -40> )

< -40> SO

( : %)

1 SO	1999	75.4	1.2	8.5	4.8	4.9	-	5.2
	2000	62.7	9.9	6.5	5.8	4.8	3.0	7.4
2 SO	1999	68.6	0.1	1.5	12.1	8.7	-	9.0
	2000	50.2	13.2	1.4	10.8	6.9	10.8	6.6

: , “ , SO 2000 , ” 21, 20001 9

320

(2)

가

가

가

31

.176)

1/10 3

10 가

가

가

가

가

---

176)

가

가





.(< -42> ) 10  
 26  
 3  
 1 가 2 (2000.10.20 2001.3.13)  
 가 TV 21  
 (< -42> ).

< -42>

	( ), ( ), TV( ), ( ), ( ), ( ), ( ) ( ), TV( ), ( ), ( ), TV ( ), ( ) ( ), ( ), TV( ), ( ), ( ), ( ), ( ), ( ), ( ), ( ), ( ), ( ) ( ), ( ) ( ), ( ) ( ), ( ) 26
	( ) TV( ), ( ), ( ) ( ), ( ) ( ), ( ), ( ), ( ), JBC ( ), ( ), ( ), ( ), ( ), ( ) ( ), ( ), ( ), ( ), ( ), ( ) ), ( ), ( ), ( ) 21

가 , TV 가

(3)

1999 가  
 PP PP 2000 55% 가  
 가  
 66% 가 1 ,  
 가 . 2000  
 (< -43> ) .

< -43>

( : )

PP ( , PP )	1996	181,853	181,853	410,728	-228,875	-	-
	1997	166,368	155,469	359,638	-193,270	-474,093	-15.7%
	1998	171,329	158,122	330,201	-158,872	-575,320	1.7%
	1999	199,080	173,094	210,260	-11,180	-434,987	9.0%
	2000	314,544	299,299	375,000	-60,455	-423,856	54.8%
PP	1996	36,807	36,807	47,094	-10,287	-	-
	1997	162,950	157,353	163,576	-626	-20,904	145.3%
	1998	421,750	414,263	406,671	15,079	-3,561	96.8%
	1999	533,094	528,063	515,668	17,426	10,208	24.3%
	2000	1,037,794	1,022,961	1,000,990	36,803	47,011	66.1%
PP	2000	4,760	3,124	23,075	-18,315	-	-

) PP 2000 5 PP  
 : (2001),

PP 200 26 15 가  
 . 가 , , , . 가  
 , , .  
 PP ,  
 PP .

< -44 > PP 2000

( : )

PP		PP		PP	
LG	263.0	SBS	9.5	TV	- 14.7
CJ 39	106.0	KMTV	9.2	TV	- 24.1
MBN	27.5		3.5	TV	- 23.3
OCN	20.1	TV	1.3	TV	- 22.8
	19.8		0.70	TV	- 30.4
	16.9	TV	0.46		- 31.9
	13.4		-0.87	SBS	- 53.0
m · net	11.6		- 3.2	SDN	- 514
YTN	10.2		- 14.0	-	-

2001 6 4 81 191 ( )  
 , 97 ) 가 2000 5 15 PP 가  
 가 29 44 , 2000 PP  
 가 .

(4) (NO)  
 1995 TV 1 NO 1997  
 SO 가 2 NO가 . 2 (NO) SK  
 7 13 가  
 . 1999 SO 가  
 SO NO 3 SO  
 PP 2 . 2000 6 , ,  
 17 SO가 가  
 TV NO .

< -45 >

	가		(%)
	15,442,700	85( 8)	50.3
	6,835,249	42	54.8
	3,644,979	21	58.1
	605,410	2	32.6
가	3,620,664	17	39.7
	736,398	3	35.9

: (2000.12.) , P.153 .

(5) ( , KDB)  
 1999 8 3 가 가  
 가 . 2000 1  
 가 . 2000 11 (KDB)  
 , 12 . 2001 1 KDB  
 , 3 KDB . KD  
 3,000 , (15%), KTF(3%), KBS(1  
 MBC(6%), (29.55%), (39%) .  
 . , SBS , .  
 KDB 2001 6 49 60  
 1 , 7 , ,  
 . 2000 10 TV  
 86 . MBC, SBS, iTV 가  
 . 83 11 , 6 , 5 , 7 ,  
 , 9 , 7 , 2 , 2 , 3 , 3 ,  
 . KBS1, 2 EBS ,  
 ‘ , CNN NHK 7 ,  
 2 PPV(pay per view  
 10 가 가 .

KDB  
 . , ( )  
 6 ),  
 . KDB KBS  
 7000 , 가 3000  
 가 . PPV  
 1000 . HBO 7900 ,  
 TV 5000 . KDB DVB-MHP  
 . KDB 2002 3  
 ‘(skylife) .

(6)  
 2000 1,000  
 (< -46> ).

, . (<  
 -47> )

< -46>

	2000	2003 ( )
	· 1,400 - 10 : 700	· 5,000
	· 1 1	· 1

) 1 : 16,000 (2000 )  
 : 가

< -47>

( : 2001 1 )

	38 38	36 38	49 49	123 125
	( )			(82 )

, .  
 가 .  
 가 , 가  
 , .  
 , 가 .  
 3)

가 1991  
 가 . 2001 5  
 216 , 3 (1998 2000)  
 가 136 . , 48 , 59 ,  
 73 , 12 . 2001 6 TV  
 77 . TV 2000  
 가 127 , 가 59  
 (46%) , .  
 2 13 가 1 74 , 3 70

3  
 96 , 3 47  
 가  
 3.3% .179)

< -48> TV

	( )			( )
213	89,017	5,493	4,321	56,059
1	420	25.8	20.3	269.5
	622	48	38	353
	318	14.6	11.3	228

: <http://www.mct.go.kr/tonggye>, 2001. 4

가 2001 ‘ ,  
 40% . 2002  
 35% , 2003 40% . 2002 6  
 ,  
 .180)

4 .

( )

3 (1998-2000)

179) , 2001.7.13.  
 180) , 2001.6.20.

2000

1)

가 . 1960 80  
 가 가  
 가 1가 . 2000  
 1.56 , TV  
 가 가 1.60 가 가  
 .181)  
 가 . TV 가 1998 12  
 83 가 가 2 SO가  
 1999 12 179 가 . 2000 SO가  
 가 가 가 가 가 2001 3  
 가 가 389  
 가 가  
 1994 20.7% 99 50%  
 2000 1900  
 .182)

. 1999 130 2000  
 6 , , ,  
 507 1 3.3 가  
 (12.4%), (10.9%), (16.5%) 가  
 (7.5%)

---

181) , 2000 , 2001.  
 182) , , 1999.

가 .

2) 가

가 , 가 가 ,  
가 가  
가 가  
가

「2000 」 가 183)

5 12 , 6 33 , 8 18  
95 24 , 15 , 8 (< -49>  
) . 20 가 5 47 ,  
6 37 , 8 24 95  
18 , 10 , 13 가 .  
가 95 32 , 38 ,  
1 가 가 .  
가 .  
, , 가 . 가 ,  
,  
, , 가 .

---

183) 2000 , , , , 가 , ,  
, 가 , . . . , , ,  
, 가 ' 가 , ,  
, 가 , . . . , , ,  
PC .

< -49> 가 ( : , )

가						
	2000		2000		2000	
	0.45	-0.02	1.05	0.01	1.32	0.03
	0.37	-0.09	0.35	-0.08	0.36	-0.03
	0.44	0.00	1.15	0.14	1.39	0.11
. . .	0.13	-0.12	0.14	-0.12	0.16	-0.10
	0.12	-0.19	0.11	-0.16	0.09	-0.13
	2.24	0.01	2.52	-0.15	3.46	-0.16
	0.09	-	0.10	-	0.08	-
PC	0.00	-	0.01	-	0.01	-
	0.08	-	0.10	-	0.11	-
	5.12	-0.24	6.33	-0.15	8.18	-0.08

- 1) 1995
- 2) , PC , 95  
: 2000 . p.17 < 1> .

「2000 가 가 15 가 TV 가 . < -50> 가 가 62.7% .184) 가 15 23.7 96 2.3 3 184) 2000 ( 가 ) KBS가 2000 가 . 96 2000 가 95 2000 .

4 , 4.6  
 96 가

< -50> 2000 가

가	(%)
,	10.1
TV	62.7
PC	12.5
	3.4
	3.2
	8.0
	15.1
	32.3
가	22.8
가	33.5
.	50.7
	3.7

: , 2000 ,  
 (<http://www.nso.go.kr/report/data/ssso00-2.htm>)

3) TV

‘ , 2000 95  
 1 가 2 24 , 15 , 16 2  
 52 , 3 46 .  
 84.6% , 86.8% , 90.7%  
 2 50 , 3 17 , 4 9 .  
 < -51> 가  
 , 3 15

가 43.8%, 가 45.4%, 가 46.2%,  
5

< -51 >

( : %)

	1995	2000	1995	2000	1995	2000
0	10	15	7	13	6	9
15 -1	17	15	13	12	9	7
1 15 -2	25	22	18	18	13	15
2 15 -3	20	19	19	19	15	15
3 15	28	29	43	38	56	54

: 2000 , P.121.

TV

34 , 41 , 43

, KBS1, KBS2, SBS, MBC 4

1998 2000 가 TV

. AC Nielsen 가 6 34

6 8 26

가 < -52> 3  
 가 1998 4  
 2000 50 가 54 1  
 가  
 가

< -52> 가 TV

( : : )

				KBS1	KBS2	MBC	SBS	
가		2000	6:08	1:23	1:04	1:28	1:19	:54
		1999	6:10	1:26	1:15	1:46	1:36	:05
		1998	6:34	1:39	1:22	2:00	1:29	:04
		2000	5:14	1:20	0:49	1:13	1:08	:44
		1999	5:18	1:24	0:59	1:28	1:22	:04
		1998	5:41	1:33	1:07	1:44	1:13	:04
		2000	7:57	1:26	1:36	1:55	1:43	1:18
		1999	7:53	1:24	1:51	2:22	2:06	:08
		1998	8:20	1:49	1:57	2:26	2:00	:08
		2000	8:46	1:37	1:46	2:13	1:54	1:17
		1999	8:47	1:36	2:02	2:41	2:19	:06
		1998	9:17	1:55	2:05	2:57	2:15	:05

: ACNielsen . 2000

TV

「2000」 9 ,  
 10 , 8 .  
 , , 7.4% ,  
 6.9% , 5.7% 2 11 ,  
 2 31 , 2 41 .

1999 2 32

8 , 9 , ,  
 , 2 14 , 2 34 , 2 43 .  
 1  
 , , 1 37 , 1  
 43 , 2 32 , 42 , 1 35 , 1 10  
 . 185)

TV

< -53 >

( : : , %)

	0.09	7.4	2.11	0.10	6.9	2.31	0.08	5.7	2.41
	0.08	6.9	2.14	0.09	6.4	2.34	0.08	5.0	2.43
	0.00	0.4	1.37	0.00	0.4	1.43	0.01	0.6	2.32
	0.00	0.2	0.42	0.00	0.2	1.35	0.00	0.2	1.10

: 2000 , p.142

,  
 , 1 , 2 ,  
 4 , 0 , 1 , 2  
 1.6% 0.3% ,  
 3.1% 1.9% , 4.0% 1.5% . 95  
 ,  
 가 . 10  
 (16 19 ) 20 가 .  
 < -54> .

가

< -54> 2000

( : )

	2.24	0.01	2.52	-0.15	3.46	-0.16
	0.08	-	0.09	-	0.08	-
	0.00	-	0.00	-	0.01	-
	0.00	-	0.00	-	0.00	-
	0.09		0.10		0.08	
	0.01	-0.03	0.02	-0.03	0.04	-0.04
	0.00	-0.01	0.01	-0.01	0.02	0.01

:

4)

가

(1)

가 .186) 1998 2000 KBS1, KBS2, MBC,  
 SBS 가 < -55> , KBS1 2000  
 10.7% 10.8% 가  
 . MBC  
 3 가 가 .  
 1998 10% 2000 10%  
 가 .  
 가 .  
 , . 1998 3  
 KBS1 19.4%, 16.9%, 18.6%, KBS2가 13.5%, 12.0%, 11.0  
 18.3%, 12.2%

---

186) 가 가 가 가  
 가 가 가 가  
 가 = 가 (Households turned to Channel) ÷  
 TV 가 (Total TV Households) × 100  
 : , 1999 , p.9.

< -55 >

( :가 %)

	KBS1		KBS2		MBC		SBS	
1998	12.1	25	10.1	21	14.8	30	10.9	23
1999	10.7	23	9.4	20	13.2	29	12.0	26
2000	10.8	22	8.5	17	11.6	24	10.5	22
	11.2	23.3	9.3	19.3	13.2	27.7	11.1	23.7

: 2000 ACNielsen

MBC 1998 25.4% 1999 22.9%, 2000 19.4%  
 . SBS 13.3%, 15.8%, 14.3%  
 14.5% . SBS KBS1, KBS2  
 , MBC 3 8% 가

< -56 >

( : %)

	KBS1		KBS2		MBC		SBS	
1998	19.4	27	13.5	19	25.4	35	13.3	18
1999	16.9	25	12.0	18	22.9	34	15.8	23
2000	18.6	26	11.0	15	19.4	27	14.3	20
	18.3	26	12.2	17.3	22.6	32	14.5	20.3

) : 20:00-22:30, 19:00-22:30  
 : 2000 ACNielsen

340

가 . 4 , ,  
/ , , /  
( <  
-57>). 가

< -57>

( : %)

	1998	1999	2000
	16.4	17.1	14.2
	18.0	15.5	13.2
/	12.0	11.5	10.3
	9.8	12.6	13.0
	10.0	7.7	6.9
	9.2	8.6	7.1
	10.4	9.1	8.0
	9.7	7.3	6.1
/	8.7	7.3	6.1
	7.3	6.0	4.3

: 2000 ACNielsen

가

5

1998 2000

3 5  
2000

3

5

5

< -58 >

5

	1998			1999			2000		
1		MBC	48.3		MBC	51.6		MBC	54.1
2		MBC	42.9		SBS	38.6		MBC	42.1
3		KBS1	42.3		MBC	37.2		KBS1	34.8
4		KBS1	38.2		MBC	36.9		KBS1	33.5
5		SBS	35.5		SBS	35.7		MBC	31.3

: 2000 ACNielsen

MBC 가 1998 1999  
 SBS 가 MBC  
 KBS1 KBS2  
 2000 KBS2  
 MBC SBS 3 SBS  
 1998  
 2000 가  
 , 2000 5 15%

< -59 >

	1998			1999			2000		
1	TV	MBC	27.0		SBS	22.0		MBC	16.3
2		MBC	24.4		MBC	20.8		KBS2	15.2
3		MBC	23.2		MBC	19.5		MBC	15.1
4		MBC	20.8		MBC	17.2		KBS2	14.9
5		SBS	19.8	( )	MBC	14.9		KBS2	14.3

: 2000 ACNielsen

가 2000

SBS

가

98

2580', ' 25 '

, 2000

가 'VJ

10 30

< -60 >

	1998			1999			2000		
1		MBC	27.8	2580	MBC	19.9		SBS	30.3
2		MBC	21.1		SBS	18.1		SBS	17.1
3		MBC	21.1		SBS	16.9		KBS1	15.9
4	2580	MBC	20.8		MBC	16.4	VJ	KBS1	15.8
5	25	KBS2	18.9	~	MBC	16.2		MBC	15.3

: 2000 ACNielsen

1998 2000 20%-26

가

가 2000 SBS MBC

1999

'2000 가

26.6% . 2000 god, 가

'KBS 가 ' 20.6%

< -61> /

	1998			1999			2000		
1	TV	KBS1 KBS2	24.5	2000	SBS	26.6		SBS	23.6
2	TV	SBS	24.1	TV	SBS	25.7	TV	MBC	22.3
3		SBS	21.5		SBS	24.8	TV	SBS	21.56
4		SBS	20.6		SBS	22.3		KBS2	20.8
5		KBS2	20.3		KBS2	22.0	KBS 가	KBS2	20.6

: 2000 ACNielsen

가

1998 MBC ‘ , 35.4% (性)

가

KBS1 ‘ , 1999

2000 MBC ‘

가 가

< -62>

	1998			1999			2000		
1	:	MBC	35.4		MBC	20.5		MBC	15.5
2		KBS2	16.0		SBS	17.2		MBC	14.9
3		MBC	15.8		SBS	17.1		MBC	13.4
4		KBS1	15.7		SBS	16.0		KBS1	12.9
5		MBC	15.4		MBC	14.8		KBS1	12.9

: 2000 ACNielsen

(2) TV<sup>187)</sup>

가 .

. < -63> 2000

가 12.1% 1 .

187) TV

TV

가

가 OCN 11.6%  
 2 TV MBN 3 , TV  
 SBS  
 IMF  
 MBN  
 TV  
 가  
 가

< -63> 2000 TV

( : %)

1		12.1	OCN	11.1		18.6		19.4
2	OCN	11.6		9.7	OCN	10.1	OCN	16.9
3	MBN	6.6	MBN	7.7	SBS	9.1	TV	9.6
4	TV	6.2	TV	5.8	SBS	6.9	KMTV	6.8
5	SBS	5.7	Drama_net	5.8	TV	6.0	m-net	5.8
6	KNTV	5.7	KMTV	5.4	KMTV	5.7	SBS	5.7

< -63 >

7	m-net	5.2	SBS	5.2	m-net	5.0	SBS	5.2
8	Drama-net	5.1	m-net	5.2		4.3	NTV	4.0
9	YTN	4.4	YTN	4.9	Drama-net	4.0	MBN	3.2
10	NTV	4.3	39	4.8	YTN	3.6	YTN	2.1
11	39	4.2	NTV	4.7	39	3.5	LG	2.1
12	SBS	4.2		4.6	MBN	3.1	Drama-net	2.1
13		4.1	LG	4.0		2.8	+ 26	2.0
14	LG	3.7	SBS	3.7	LG	2.6	btn	2.0

1) 50:50

2)

: TV , 2000

1999

가 10.4% 1

DCN

KMTV가

. 2000

1999

2000

MBN

가

가

< -64> 1999 TV

( : %)

1		10.4		9.4		13.9
2	DCN	9.2	DCN	9.2	KSTV	11.7
3	KMTV	8.6	KMTV	8.5	M-net	10.2
4	KSTV	8.2	HBS	8.3	TV	9.8
5	HBS	8.0	MBN	7.4	DCN	9.1
6	M-net	7.7	KSTV	7.3	KMTV	9.0
7	TV	7.5	M-net	7.0	HBS	7.0
8	MBN	6.2	TV	6.9	YTN	4.5
9	Drama-net	5.5	Drama-net	6.1	39	4.0
10	YTN	5.1	39	5.4	Drama-net	3.1
11	39	5.0	YTN	5.3	Q	2.5
12	LG	2.7	LG	2.9		2.3
13	Q	2.4	Q	2.3	LG	2.1
14		2.0		2.1	MBN	1.8

)  
: 1999

(3)

가

가

.( -65)

가

. 99

KMTV가 0.83%

5

가 1.52%

5

KMTV

0.94%

12

0.75%

7

2000

OCN 0.91% 5  
 1.35% 6 5  
 0.79% 6 . 99 KMTV  
 0.83%, 0.94%  
 0.75% 1.16% 2 가  
 2000 OCN 0.91%, 1.35%  
 , 0.79%, 1.57%  
 1  
 5 가 1 5  
 가  
 가 TV  
 TV  
 가

< -65> 1999 2000

( : %)

	1999		2000		1999		2000	
1	MBC	6.43	MBC	6.59	MBC	5.58	MBC	6.64
2	SBS	4.84	SBS/	4.97	SBS	5.54	SBS/	5.78
3	KBS1	4.03	KBS1	3.75	KBS1	4.84	KBS1	5.66
4	KBS2	3.03	KBS2	3.36	KBS2	3.20	KBS2	3.06
5	KMTV	0.83	OCN	0.91		1.52		1.57

1) TV 가

2) : 1999 , 2000 TV

350

가  
 < -66>  
 1999 27.99%, 2000 27.75%

1999 2000

가  
 23 24% 6% TV  
 3-4  
 76 79% TV 67%  
 가 가 가

가  
 가  
 가  
 TV  
 가  
 가 TV  
 .188) 1999 2000  
 가 2000

---

188) 가

< -66> 1999-2000

( : %)

		1999	2000	1999	2000	1999	2000	1999	2000
		19.35	19.19	18.24	17.42	21.25	21.53	23.06	24.42
		8.55	8.33	9.08	9.07	7.94	7.38	6.49	6.15
		0.09	0.23	0.10	0.24	0.05	0.20	0.04	0.24
		27.99	27.75	27.42	26.73	29.24	29.11	29.59	30.81
		72.02	72.25	72.58	73.27	70.76	70.89	70.41	69.20

) TV 가 1999 95% ±4.26%, 2000 ±4.38%  
: 1999, 2000 TV

, 2000

6 가

6

11

가 12

가

5

6

2

9 가

20

11

11

6

1

4

1%

TV가

11

12

5

TV

1% 3%

가





(SBS)

1998 3 2 2000 12 15 2 10

가

9 30%

가

MBC

가

가

(SBS)

가

가

2000 4 29 30

40 , , 10 14

21

, MC 가

가

(SBS)

3 ‘ ’  
 . 2000 1 8  
 1 ‘ ’, 15 2 ‘ ’, 16  
 3 ‘ ’

2000

27

2000

가  
AIDS

28.1% (1,2 ), 34.6% (3 )

(AC

(2)

2000

MBC

, SBS

, LA

가

가

2000

MBC 가

, SBS .com, KBS

‘가’  
 가  
 20-40 5  
 가 , ,  
 ‘ , ‘ 가  
 , .  
 .191)  
 . 1998 SBS ‘ ,  
 ‘ , 4  
 1  
 SBS , MBC ‘ , ‘god’ .  
 . SBS ‘ ,  
 KBS ‘ ,  
 가  
 . CBS ‘ (Bi  
 Brother)’ CBS ‘ (Survivor)’, PBS ‘1900’ ,  
 . ‘1900’ 가

---

191) 21, 2000 7 , P.126.





359

SBS

3 22

KBS 2TV 2000 3 31

3 가

가

194)

< -68> 3 TV

MBC		,
KBS2		e , ,
		N , . (kbslogin.com)
SBS		
		, vs. ( , ), ,

가



‘ , ’ . MBC가  
가가 , 1999  
2000 1 .(197)

6)

TV, , 가, 가가 가  
가 , 가  
가 가

가  
가

---

197) , 2000.1.12.



(가)

TV 1996 (Telecommunication Act 1996)

FCC가

( , ),

1996

FCC

가

1998 TV

( )

FCC가 2001 1

가

11가

( )

21 가

(public servic

broadcasting)

가

가

가 2000

가 ' (A new future for communications)

364

, 가 .  
, .  
, .  
, .  
, .

( )

. 2000 8

,  
,

가

2000

2.

가

가 .

(1)

(35%)

, 4  
UPN)

(ABC, CBS, NBC, Fox)

(

TV , TV .

(2)

15%

2000

(3)

2000

49%

4

가

가

6

(4)

TV

가

TV

1999 1

, 2000

가

MBC, EBS, , 1 30% ( , KBS  
 ). TV  
 , 가 PP 33% 100%  
 ( ). , ,  
 33% .

3. •

(1)  
 1934 (Communication  
 of 1934) (FCC; The Fede  
 Communication Committee) .  
 1996 FCC 가  
 1996

, FCC  
 FCC . 1999 FCC  
 “21 FCC(A New FCC for the 21st Century)”  
 21 FCC

(2)

가 , 가  
 가 가  
 가

가

2000 12 DTI “ (A New Future for Communication)” 가

ITC, OFTEL

. OFCOM(Office of Communications)

198)

(3)

2000

가

가

198)

9 가 , OFCOM  
. 9 가 OFCOM

(BSC), (ITC), (OFTEL),

(Radio Authority), (Radio-communications Agency) . BBC  
Board of Governors, British Board of Film Classification, Office of Fair Trading, Sianel  
Pedwar Cymru(Welsh Channel 4)

, 가 ,

가

(4)

, 가 .

가 , .  
가 .  
가

1999 11 30

,  
가

가 ,

가 , .

4.

가

,

가

가

가

가

가

가

/  
가

가

가

1984

, 1987

가

(Programme pour la recherche et l'innovation dans l'audiovisuel et le multimédia : PRIAMM) 가 CNC가

가 1 11% 가 (Tax Spécial Additionnel: TSA) 5.5% 가 가 10

(EOF)' 40%, 60%

(EOF)' 15% —20 2

가



(2)

Multi-Use

multi-use

가 가

가가

,  
가

multi-use

multi-use

가

multi-use

5.

가 ,

가 가 ,

(1)

2000 6 TV 가 1 80 84% 8442 가 가  
 가 TV 가 6,770 TV가  
 68%가 가 , 가 1,299 TV가 15%가 가  
 TV 가 가

가 1996 , 1990

AOL (2000 1  
 Viacom CBS (1999 9 ), AT&T TCI (1999 4 )

○ : 1985 General Electr  
 NBC , 1995 Walt Disney가 ABC , 1999  
 Viacom CBS 5 NBC

○ TV : AT&T(1 )가 TCI( 1 )  
 ( 3 ) , ( 7 )가 ( 10 ) GC  
 , ( 6 )가 TCA(180 가 )  
 TV '97 110 , 98 119 , 99 90 , 2

22 .

○ . : 1998  
 가 .  
 . 1998 Disney가 Infose  
 , NBC가 Cnet Snap  
 1999 TCI @ Home Network가 Excite , USA Net  
 가 Lycos . 2000  
 가 ,  
 . Go.com  
 , NBCi( ), CNN

, , 25 TV  
 1996 25%, 1997 33%, 1998 36% 가 .  
 가 가 90% , 11  
 50 11 ,  
 , , , .TV .

(2)  
 BskyB, , TV  
 , TV TV,  
 6  
 (AOL- , , , , ,  
 ) . 가 ,  
 , 가 TV

가 . EU 가

, 2000 가 . EU

BSkyB ‘ ’( TV) 가 ,

AOL 가(FCC 가 ) .

CLT/Ufa TV ‘ ’ 가 .

, 1999 ,

1999 TV 24% , DF1(

) , Fininvest, ,

, DF1 Premier Premier World

, Mediasat ,

. 2000 5 , , TF1 5

‘@lliance’ TV TV .

2000 4 RTL .

, , 가

EC 2000 10 .

, ,

, RTL 2000 4 . Clt/Ufa TV

TV가 RTL /WAZ가 37%, GBL

30%, TV가 22%, 가 11% . RTL

, ,

. GBL 30% 67%

. RTL Clt/Ufa

Pearson TV .

RTL Clt/Ufa

Audiofina( )가 49% , ,

. 1998 TPS( )

, 1999 Premier ( ) TV  
 . Pearson TV 1  
 , 17,500 . GBL  
 Autofina CLT-UfA .

TV TV 가 가 .

(4)

TV . 1998  
 가 가 , 1999  
 . 2001 38  
 SO가 ,  
 가 PP가 . 2000 12 가  
 2002 3 . MPP, MSO, MSP

. , . 가  
 . SO  
 33% 100%  
 SK ,

,  
 가 . 33%  
 KBS MBC .  
 (20% 33%),  
 . TV 4.8%

TV  
가 ,

6.

가

가

가

가 가

가 ,

가

가

가

,가

가

가

가

가

,

가

가

가

, T-commerce

가

TV

가

1.

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• , “ , , 2001, 6.

“ ”,

, 2001, 5.

, ¶ ,

, ¶ ,

, ¶ 21 ,

, ¶ ,

, ¶ ,

, ¶

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Broadcasting & Cable

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2.

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## Abstract

# The Market Analysis of Foreign and Domestic Broadcasting Industry

## 1. Purpose of Study

- The study aims to analyze changes in broadcasting industry and in domestic and foreign countries, to understand current trends, to predict direction of the changes in the world broadcasting markets, and finally to derive present problems to develop broadcasting industry.
- The study selects and analyzes five countries leading the broadcasting market, U.S., France, United Kingdom, Germany, comparative models to Korean broadcasting market. The study analyzes of three foreign countries, U.S., France, United Kingdom as Korea as domestic market. The analyses of Germany and Japan published in a separated report, "*The Industrial Analysis of German and Japanese Broadcasting Markets.*" Widely collected data from countries is expected to be a basic database to evaluate and build broadcasting policies for 21 century.

## 2. Main Content of the Study

The study consists of four subjects; (1) broadcasting policy, (2) of broadcasting market, (3) main players, and (4) audience and program analysis of each country follows the subjects. The study keeps a guide use industrial statistics issued after 1999.

- (1) 'Broadcasting Policy' includes policies of digitalization, support for broadcasting industry and current trend of technology development as well as analyzes the changes in regulation, ownership and programming from traditional regulation policies.
- (2) 'The Structure of Broadcasting Market' provides data of market revenue, subscriber, concentration of market in terrestrial, cable broadcasting markets. The study also analyzes the trend degree of digitalization in the broadcasting market, change market structures derived by merger and amalgamation, and foreign capital.
- (3) 'Main Players' consists of players in three areas, service program production, and program distributor. The subject analyzes the strategies of digitalization, business, programming, and demand of programs.
- (4) Finally, 'Audience and Program' reviews the television patterns, audience rating, and popular television programs.

### 3. Main Findings

- Revenue from the world television market in 1999 and 2000 show growth. The growth in PAY-TV can be attributed to the steady ex of digital TV via satellite and a lesser extent to the growth in ca
- Digitalization creates various windows for distribution of prog leads extending market size of program production, and program demand. However, a few major players control the program through their large quantity of programs and power in dis structure as well as strengthen their monopoly position in the ma
- The world television market closely connected with each market. It indicates that domestic market should be analyzed changes in world market.

#### U.S.

U.S. broadcasting market has been radically transformed as a re combination of technological and economic changes. The industry faced with the task of expanding in a hard economic climate wh financial issues at stake are considerable. However, all the constitue market show good market performance. Cable TV continues to expand fierce competition from new media such as MMDS and satellite reasons for its success lie in today's extensive and increasing offer 300 thematic channel), pricing and the steady introduction of new s the digital satellite market, there has been a heavy degree of con and there are now just two operators.

The production of TV programs lies traditionally in the hands

Majors and independent producers. The major players, Time-Warner (Warner Bros. TV, Lorimar TV and Orion TV), Columbia Pictures TV/trustier, Fox, Universal and Walt Disney dominate the prime-time program slots as well as take on orders from networks and cable channels.

### France

Traditional channels and analogue broadcasting is underg restructuring process, a public sector suffering from the private sect digital broadcasting, no digital terrestrial broadcasting will launch be A widely digitized cable sector starts to attract subscribers. Four Noos leading French operator, France Telecom, NC, UPC France, the cable market. Digital satellite broadcasting shows most dy Europe. There are two factors to explain the success of digital France; (1) the relatively poor TV channel offering prior to the in of digital TV in the country, (2) the media-based battle entered CanalSatellite and TPS, which has made French households far mo of the existence of digital TV and its related services and has broug a sufficient fall in price to make subscriptions affordable in a larg of households.

## United Kingdom

For many years, three methods of broadcasting (terrestrial, satellite, cable) have been operating side by side and all three have entered digital TV at almost the same time. The UK market is a scene of commercial battles among operators. Although the UK was the first country in Europe to have introduced an analogue channel bouquet and is where the highest number of pay TV subscribers is to be found, it is paradoxically among the last to benefit from a digital TV service.

In the recent years, the cable sector has gone through a phase of consolidation, resulting in a fall in the number of UK cable operators to 3 main players. Market leaders are NTL, Telewest Communications & Wireless Communication.

## 4. Suggestions

- The study selects main countries as comparative models to Korean and provides recent changes of policy and market structure in these countries. After this study, more countries should be selected for a wide and deep study. In special, more Asian countries should be included in the type of study. They will be good comparative models to the Korean market because of similar cultural backgrounds. In addition, other countries, specially China and some southeast countries are expected to be overseas markets for Korean broadcasting industry.

- The study tries to collect the latest date but depends on industrial statistics of 1999 and some of 2000 because many countries issue industrial yearbook after the second half of the next year. After this study, it is to arrange the date of research to use the latest industrial statistics.
  
- The study as a first project to analyze the world television satisfies to provide industrial statistics with short interpret explanation. The study will be updated annually and be expected deep analysis with accumulating data. Finally, the study will be to provide prediction of market changes.

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