

Global Value Chain Upgrading of China's Documentary Industry: Position, Bottlenecks and Strategic Paths

Yingfeng Liang¹, Li Yin^{2,*}

¹ College of Humanities and Arts, Guangxi Agricultural Vocational and Technical University, Nanning, Guangxi 530001, China

² College of Media, Guangxi Minzu University, Nanning, Guangxi 530006, China

* Corresponding author: Li Yin (Email: gxtc1953@163.com)

Abstract: This paper examines the position of China's documentary industry within the global value chain and proposes strategic pathways for its upgrading. Amid globalization and digitization, China's documentary sector is transitioning from a traditional export model to a networked, multi-dimensional system. Leveraging unique cultural resources, growing production capacity, and an expanding domestic market, China seeks to enhance its global influence. However, challenges such as market concentration, limited narrative innovation, and low value-added content persist. This study employs the UNCTAD global value chain framework and Michael Porter's diamond theory to evaluate China's documentary industry, analyzing its export market structure, content value, and industrial chain participation. Key findings highlight an imbalanced market reliance on North America and the Belt and Road countries, a shift from symbolic cultural displays to narrative-driven content, and limited integration in high-value chain segments. Proposed upgrading paths include technological innovation, diversified market expansion, and industrial chain integration through platformization and IP operations. These strategies aim to elevate China's documentary industry from a mid-to-low-end position to a more competitive global standing.

Keywords: China documentary; Global value chain; Industrial upgrading; Market expansion; Technological innovation.

1. Introduction

In the context of globalization and digital revolution, the global documentary industry has transcended traditional unidirectional export paradigms, evolving into a multi-platform, networked ecosystem marked by refined division of labor. China's documentary sector, endowed with profound cultural heritage and expanding production capacity, stands at a critical juncture: while domestic market growth and selective international successes signal progress, structural vulnerabilities persist. Over-reliance on North American and "Belt and Road" markets, coupled with narrative strategies that prioritize symbolic cultural display over universal storytelling, has confined the industry to mid-to-low segments of the global value chain (GVC). This study interrogates how China's documentary industry might transcend these constraints to achieve systemic upgrading.

To diagnose this challenge, the research integrates the UNCTAD's GVC framework with Porter's Diamond Theory, offering a dual-lens analysis of industrial dynamics. The GVC framework illuminates export market imbalances and content value distribution patterns, revealing limited participation in high-value domains such as global distribution and post-production innovation. Complementing this, Porter's model identifies gaps in advanced production factors, international demand adaptation, and cross-industry collaboration—key drivers of competitive advantage. Empirical evidence, including case studies of *A Bite of China* and other representative works, underscores a narrative transition from cultural symbolism to emotionally resonant storytelling, yet highlights persistent technological gaps in areas like AI-driven historical reconstruction and data visualization.

Central to this inquiry is the proposition that strategic upgrading requires simultaneous intervention across three dimensions: technological empowerment to enhance production efficiency and creative innovation, market

diversification to reduce regional dependency and cultivate multi-platform global reach, and industrial chain integration to shift from fragmented project-based operations to sustainable platform ecosystems. These pathways are validated through comparative analysis of global mature markets and China's emerging practices, yielding actionable insights for policymakers and industry practitioners.

2. Analysis of the Position of China's Documentary Industry in the Global Value Chain

In the wave of globalization and digitization, the value chain of the global documentary industry is being reshaped. The traditional one-way export model dominated by mainstream media is gradually evolving into a complex system characterized by multi-platform engagement, networking, and finer specialization. Against this backdrop, China's documentary industry is actively seeking a new position within the global value chain, leveraging its unique cultural resources, increasing production capacity, and expanding domestic market. However, to accurately describe its "position," it is necessary to go beyond simple production and export statistics and conduct a deep analysis of its specific performance in core dimensions such as export market structure, value-added content, and participation within the industrial chain. Drawing on UNCTAD's analytical framework for global value chains and based on Michael Porter's diamond theory, this chapter systematically evaluates the current status of China's documentary industry within the global distribution system. It aims to reveal its comparative advantages, disadvantages, and structural dilemmas, laying a solid foundation for discussing subsequent upgrading pathways.

2.1. Market Structure: Imbalance and Regional Concentration

The export market structure of China's documentaries exhibits significant characteristics of "imbalance" and "regional concentration." On the one hand, its international dissemination relies heavily on cooperation with countries along the "Belt and Road" initiative, forming a distinct geopolitical dimension. On the other hand, its influence remains limited in the broader global market, particularly within mainstream European and American markets, facing dual challenges of market access and genuine globalization. This structural imbalance reflects the real position of China's documentary industry in the global value chain: it acts as both an executor of national transformation strategies and a latecomer within the global trade system.

2.1.1. Main Export Markets: Asia, Europe, and North America

According to the China Documentary Overseas Communication Report issued by the First Institute of Finance and Economics, the geographical distribution of China's documentary overseas communication shows obvious imbalance. Historically, the North American market, particularly the United States, has been a primary target region for Chinese documentary exports. However, the report clearly points out that excessive concentration in a single market carries significant risks and may not yield optimal dissemination results. Consequently, it recommends that China pay more attention to geographical diversity in future overseas dissemination efforts, strategically emphasizing other English-speaking countries and geographically/culturally closer regions like Southeast Asia. This market concentration is partly due to North America's mature film and television industry ecosystem, strong consumer purchasing power, and extensive global distribution networks, which are naturally attractive to Chinese producers seeking international recognition and commercial returns. Conversely, language and cultural barriers increase the cost and uncertainty of entering other markets.

However, this overemphasis on mainstream European and American markets has also resulted in limited visibility and impact for Chinese documentaries in other significant global regions. For example, their presence remains relatively constrained in emerging markets such as Belt and Road countries, Latin America, and Africa. These regions not only possess large population bases and rapidly growing consumer demand but also maintain close political, economic, and cultural ties with China, potentially serving as "blue ocean" markets for Chinese documentaries. Therefore, optimizing the market structure—shifting from over-reliance on European and American markets towards a more balanced and diversified global portfolio—is a critical challenge China's documentary industry must solve to upgrade its position in the global value chain. This requires not only production adjustments but also topic selection and narrative approaches informed by a global vision and cross-cultural awareness. Furthermore, national-level encouragement and support through policy guidance and financial backing are essential to help documentary companies maintain momentum and develop diversified international markets.

2.1.2. Market Penetration Model: Focus on Countries Along the "Belt and Road"

A notable feature of China's documentary penetration in the international market is its strategic alignment with the "Belt

and Road" initiative. Through cooperation with major broadcasters and streaming platforms in countries along the route, it has built a dissemination network centered on cultural exchange and official collaboration. This model is not purely market-driven but is deeply embedded within the grand narrative of national top-level design. For instance, China Radio International (CRI), as a flagship of national publicity, plays a key role in "Belt and Road" communication practices. CRI has established linkage mechanisms with national media along the route, employing various forms such as joint interviews, live broadcast connections, material sharing, and mutual links, significantly enhancing the relevance, authority, and coverage of reports about target countries. A typical example is the collaboration since 2013 between CRI's Persian Service and the Islamic Republic of Iran Broadcasting (IRIB) to produce the four-season television documentary *The Silk Road Revisited*. After broadcasting on IRIB's international channel and other platforms, it became a benchmark for Sino-Iranian official media cooperation, effectively shaping a positive image of China in Central and Eastern Iran.

This collaborative model extends beyond simple content exchange into deeper co-production. For example, the documentary *Sea and Sky Silk Road: Close Neighbors*, jointly produced by China Media Group (CMG) and Indonesian National Television (TVRI), was broadcast during the third Belt and Road Forum for International Cooperation, fostering emotional resonance between Chinese and Indonesian audiences. Similarly, the five-episode series *Innovative China*, co-produced by CRI's Hebrew Service and Israeli TV channels, achieved an impressive audience rating of 35% after airing on mainstream Israeli channels, demonstrating the significant potential of quality co-productions in overcoming globalization barriers and entering mainstream markets. Additionally, the weekly documentary column *Silk Road Time*, jointly established by CMG and major national broadcasters along the Belt and Road route, has normalized and branded this cooperation mode. Through partnerships with European media like Deutsche Welle (DW), the content has successfully landed in traditionally challenging markets, highlighting the unique value of the Belt and Road platform in expanding global reach.

To systematically promote this strategy, China has also spearheaded the establishment of the Belt and Road Documentary Alliance (BriDoc). Guided by the State Council Information Office of China and initiated by the Documentary Research Center of the Communication University of China, this platform aims to foster international cooperation and exchanges in the documentary field. The Alliance not only hosts annual forums and organizes overseas media visits but also publishes academic achievements like *Research on the International Communication Capacity Building of Chinese Documentaries* and produces popular programs such as *Through the Chinese Lens*, providing theoretical support and practical platforms for Chinese documentaries "going global." While this government-led cooperation model under the Belt and Road framework can open specific markets rapidly in the short term, its long-term sustainability still requires market validation. It provides a "protected environment" for Chinese documentaries to avoid pure market competition initially but may also, to some extent, limit their competitiveness in a fully market-oriented global environment.

2.1.3. Export Channels: Reliance on International Co-Productions and Mainstream Streaming Platforms

China's channels for distributing documentaries globally are shifting from traditional copyright sales towards more diversified and sophisticated models centered on "international co-production" and "mainstream media platform distribution." International co-production, especially with Belt and Road countries, has become the most prominent export form. This collaboration involves not only resource combination but also deep integration of creative ideas, narrative visions, and cultural resources.

For example, CRI co-produced a documentary with Albanian Public Television (RTSH), An Albanian Director and His "Belt and Road" Documentary, which chronicled the production process and was broadcast simultaneously on RTSH, creating a synergistic promotional effect. The advantage of this model lies in its ability to reduce the "cultural discount," enhancing content acceptance and impact through partners' deep understanding of local markets and established distribution channels. However, a key challenge is maintaining one's own creative subjectivity and cultural identity within the collaboration, avoiding becoming merely a "resource supplier" or "production agent," which risks locking the industry into the lower tiers of the global value chain.

Simultaneously, the explosive growth of the global video-on-demand (VOD) market presents unprecedented opportunities for Chinese documentaries. Market research reports indicate the global VOD market size is expected to increase from \$47.66 billion in 2024 to \$100 billion by 2032, representing a Compound Annual Growth Rate (CAGR) of 9.7%. Another report predicts the global video streaming market will reach \$160.52 billion in 2024 and is expected to grow to \$411.7 billion by 2033, with a CAGR of 18.66%. Core drivers include increasing consumer demand for on-demand content and fierce competition among global and regional streaming giants like Netflix, Amazon Prime Video, Disney+, HBO Max, Tencent Video, and iQIYI. To attract and retain subscribers, these platforms invest heavily in high-quality, diverse original content, including documentaries, providing direct channels for Chinese documentaries to reach hundreds of millions of global viewers.

However, accessing these mainstream platforms is highly competitive. Chinese documentaries need to face global competition and meet platforms' stringent requirements regarding content quality, narrative format, and production standards. To date, few representative Chinese documentary works have achieved significant presence or formed a large-scale brand effect on these platforms. Additionally, the algorithmic recommendation mechanisms of streaming services can confine content to specific interest circles, making broad societal impact difficult. Therefore, leveraging these platforms effectively involves more than just distribution; it requires strategic use for brand building and market feedback. This necessitates in-depth research into successful models. For instance, platforms like Bilibili have successfully explored strategies in the documentary field, such as aggregating high-quality content, cultivating loyal young user communities, and enhancing overseas cooperation, potentially offering valuable insights for engaging with global streaming giants.

2.2. Value-Added Level of Content Production: From "Symbolic Representation" to "Storytelling"

Within the global value chain, the value-added level of content products is a key determinant of a nation's cultural industry competitiveness. For Chinese documentaries, this level is in a critical transition: moving from early reliance on superficial displays of "cultural symbols" like natural scenery, historical heritage, and culinary arts towards deeper explorations emphasizing "storytelling," emotional resonance, and universal values. The success of this transformation is crucial for upgrading China's documentary industry from a "resource provider" to a "creative source" in the global value chain.

2.2.1. Thematic Advantages: Natural Scenery, History, Culture, and Cuisine

China's most significant comparative advantage in the international market stems from its vast and rich cultural resources and diverse natural landscapes. Unique themes, such as magnificent natural scenery, profound historical culture, and rich culinary traditions, constitute the attractive "symbols" of Chinese documentaries for overseas audiences. For instance, the A Bite of China series sparked a global sensation precisely by tapping into the universal theme of "cuisine," which transcends cultural barriers and connects emotionally. Through exquisite cinematography and evocative narration, it vividly showcased Chinese culinary culture to the world, successfully transforming the symbol of "food" into a high-value-added cultural product. Similarly, Amazing China captivated overseas audiences with its unique aerial perspectives of China's landscapes, becoming a "calling card" for showcasing the national image.

The strength of these themes lies in their uniqueness and irreproducibility, enabling differentiation in the global content market. However, merely staying at the level of symbolic display is insufficient. Without deep story excavation and innovative narrative methods, these themes risk falling into a "propaganda" style, leading to audience fatigue and diminished value-added potential. For example, some early documentaries focusing on China's scenery and history, while visually stunning, suffered from monotonous narrative modes and a lack of emotional connection with contemporary audiences, resulting in limited international communication impact. Therefore, transforming rich cultural resources into globally resonant stories and elevating "symbols" into compelling "narratives" are core challenges for enhancing the value-added content of Chinese documentaries. This requires creators not only to "show" China but also to "tell" China's stories, conveying its spirit and the pulse of the times through fresh perspectives and moving human experiences.

2.2.2. Value-Added Bottlenecks: Monotonous Narrative Modes and Lack of International Appeal

Despite thematic advantages, the value-added level of Chinese documentaries in the global value chain is constrained by two core issues: standardized narrative modes and a lack of international appeal. These interrelated problems hinder the industry's leap from "Made in China" to "Created in China."

Firstly, regarding narrative modes, many Chinese documentaries still adhere to the traditional expository style of "voiceover + visuals," lacking suspense-building, character development, and dramatic conflict, making it difficult to

engage international audiences accustomed to strong plots and fast-paced storytelling. While this "impressionistic" macro depiction can present broad themes, it often lacks micro-level emotional resonance. As some researchers note, documentaries focusing on scenery, travel, and cuisine are becoming saturated internationally, while significant space remains for documentaries tackling social issues and in-depth investigations.

Secondly, in terms of international expression, Chinese documentaries often face the problem of "cultural discount." This extends beyond translation issues to encompass differences in values, thought patterns, and aesthetic preferences. Many documentaries are primarily created for domestic audiences, lacking cross-cultural communication awareness, which hinders their overseas dissemination. For instance, the narrative logic and value orientation of some domestically acclaimed "main melody" documentaries may be difficult for audiences from different cultural backgrounds to understand or accept. To break through this bottleneck, innovation in narrative perspective and expression is needed. Recent years have seen some works attempting the creative strategy of "small incision, positive energy, big theme" (focusing on micro-individuals to reflect macro-themes), achieving good results. For example, *My Spring is on the Silk Road* focuses on young Chinese individuals working along the Belt and Road route, demonstrating the initiative's impact through their personal stories. This character-driven format resonates more effectively with international audiences.

Furthermore, technological application is a significant avenue for enhancing value-added content. Utilizing CG effects, data visualization, and other technologies can transform abstract concepts and data into intuitive, dynamic visual languages, enhancing both entertainment value and informational depth. For instance, documentaries like *Building the Future Together* employed map animation to visualize Belt and Road routes and data, greatly expanding visual expressiveness. However, technology ultimately serves the content; it is a means, not the end. Only by integrating technological innovation with content innovation can Chinese documentaries truly enhance their value-added appeal and competitiveness in the global market.

2.2.3. Successful Case: IP Operation from A Bite of China to Once Upon a Bite

The success of the *A Bite of China* series and its spiritual successor *Once Upon a Bite* provides valuable paradigms for how Chinese documentaries can enhance value-added content and achieve IP-based operations. Their success lies not only in choosing the universal theme of cuisine but also in their innovations in content creation, narrative methods, and business models, evolving from single products into sustainable IP ecosystems.

Firstly, in content, they transcend the limitation of traditional food documentaries that merely "discuss dishes." They bind cuisine to history, geography, emotion, and human depth, excavating the stories and cultural connotations behind each dish. This "cuisine +" mode greatly enriches the content's layers and depth, transforming it from a "food guide" into a visual epic about Chinese lifestyles and emotional memories.

Secondly, in narrative approach, these works abandon didactic explanations for more story-oriented and emotionally resonant strategies. By focusing on ordinary chefs, fishermen, and farmers, they transmit warmth through depictions of hard work and reverence for ingredients. This narrative

successfully establishes emotional connections with both domestic and international audiences, allowing them to feel shared human experiences. For example, *Once Upon a Bite* explores similarities in cooking styles for common ingredients across different cultures, showcasing the commonality and diversity of food culture through comparison and connection, enhancing its global appeal.

Most importantly, these works successfully explored IP operation pathways. Following *A Bite of China*'s success, its brand effect quickly extended into books, creative merchandise, and offline experience stores, forming a complete industry chain. *Once Upon a Bite* went further, leveraging deep cooperation with platforms like Tencent Video. Using data analytics to understand user preferences, it implemented precise content recommendations and marketing, maximizing communication impact. This IP-centric thinking transforms documentaries from one-off cultural products into sustainable value-creating cultural brands, significantly enhancing their position and value-added potential within the global value chain. Their success proves that Chinese documentaries are fully capable of forging globally influential IPs, with the key being a steadfast commitment to content excellence, supported by innovative business models and operational strategies.

2.3. Degree of Participation in the Industrial Chain: From "Content Provision" to "Limited Integration"

In the grand scheme of the global documentary industry, China's level of participation is evolving from a singular "content provision" role towards a more advanced stage of "limited integration." However, this process is neither smooth nor straightforward. Despite significant progress in production scale and technology, China remains relatively weak in core high-value segments of the chain, such as creative R&D, international distribution, and brand operations. This "large but not yet strong" situation defines China's documentary position in the global value chain: rapidly emerging yet still striving for breakthroughs.

2.3.1. Participation Focus: Emphasis on Content Creation and Copyright Sales

Currently, the Chinese documentary industry's participation in the global value chain primarily concentrates on "midstream" content production and "downstream" copyright sales. Involvement in higher value-added segments like "upstream" creative R&D and "downstream" brand operation and derivative development remains relatively low. This pattern is closely linked to the development stage and comparative advantages of China's documentary sector. As UNCTAD reports indicate, developing countries often initially engage in global value chains by leveraging labor and cost advantages, starting from the production segment. This holds true for China's documentary industry, which possesses large production teams and relatively low costs, making it a significant base for global documentary production.

Within content production, China has demonstrated the capability to produce high-quality documentaries across genres like history, natural geography, and social reality. However, this advantage is mainly reflected at the "execution" level—shooting and producing based on existing concepts and projects. At the "creative" level—involving the excavation of original stories, the construction of unique visions, and the planning of internationally appealing

narratives—shortcomings persist. In many co-production projects, the Chinese side often primarily provides funding, filming resources, and local execution, while having relatively limited voice in core creative and decision-making aspects.

In the copyright sales segment, the dominant model for Chinese documentaries remains the "one-off" copyright transaction. Producers sell overseas distribution rights for completed works to international distributors or platforms for a lump sum. While straightforward, this model offers limited profit margins and prevents producers from sharing in the long-tail effects and value-added revenue generated by the work's subsequent dissemination. In contrast, the international mature documentary industry employs more diversified profit models, including advertising, brand sponsorships, derivative product development, offline events, and IP licensing. For instance, a successful nature documentary IP can spawn books, toys, games, theme parks, and more, forming a substantial commercial ecosystem. China's documentary industry is still nascent in this area, with significant room for improvement in chain extension and value depth development.

2.3.2. Value Chain Positioning: Middle to Low End of Global Documentary Production Chain

Based on its performance in export markets, content value-added levels, and industrial chain participation, it can be assessed that China's documentary industry currently occupies a middle-to-low-end position within the global value chain. This judgment is supported by several factors.

Firstly, regarding value capture, the industry's gains primarily derive from labor-intensive production processes and one-off copyright sales. Its ability to capture value in capital-intensive and knowledge-intensive segments like creative R&D, development, and global marketing is weak. This aligns with UNCTAD's assessment of China's position in the manufacturing global value chain. Similarly, China's documentary production leverages its comparative advantages in cost and efficiency to undertake substantial "assembly" tasks within the global documentary production network.

Secondly, concerning control over the industrial chain, China's documentary industry has limited influence in global market rule-making, standard-setting, and channel control. International documentary market discourse power is still largely held by a few global media giants like the BBC, Discovery, and Netflix. They control major global distribution channels and platforms, shaping market tastes and procurement standards. To access these mainstream markets, Chinese documentaries often need to conform to their established rules, which can constrain creative autonomy and innovation. For example, some co-productions may compromise on topic choice or narrative style to cater to perceived international demands, potentially diluting cultural identity.

Finally, regarding the domestic industry ecosystem, it is not yet fully mature. A robust documentary ecosystem encompasses creative planning, investment, production, distribution, marketing, product development, talent cultivation, and academic research—all interacting beneficially. Currently, disconnects persist between various links in China's documentary chain, notably the lack of close integration between finance and content creation, a shortage of professional international distribution and marketing talent, and inefficient industry-academia-research (IAR)

collaboration. These issues constrain the industry's pace in climbing the value chain. As emphasized in UNCTAD reports, human capital, IAR integration, and infrastructure are key elements for developing countries participating in GVCs—precisely the areas where China's documentary industry needs strengthening.

2.3.3. International Cooperation Mode: Dominance of Sino-Foreign Co-Production

Sino-foreign co-production remains the primary mode for China's documentary industry's international participation and cooperation. This pattern offers valuable opportunities for "going global" but also presents profound challenges.

Its advantages are evident. Firstly, it enables effective resource integration. China provides unique themes, abundant filming locations, and relatively low production costs, while foreign partners bring advanced production technology, international narrative expertise, mature distribution channels, and strong brand resources. This complementary synergy allows both parties to co-create works of higher quality and competitiveness for the international market. Successful synchronizations by CRI with media in Israel, Iran, Albania, etc., attest to this model's effectiveness in promoting cultural exchange and cooperation, with significant potential to enhance communication impact.

Secondly, co-production serves as a vital channel for learning international best practices. Chinese creators gain firsthand exposure to their partners' mature experience in project management, technical application, narrative techniques, and marketing strategies, thereby enhancing their professional competence. This "learning by doing" approach is effective for an industry still in its formative stages. Collaborations with the BBC, Discovery, etc., allow Chinese teams to gain insights into core creative concepts like "event-driven" or "character-focused" storytelling, as well as rigorous production workflows and quality control systems.

However, the Sino-foreign co-production model carries inherent risks and challenges. The most significant lies in the struggle for creative control and voice. In collaborations, foreign partners often hold key resources (funding, technology, distribution), granting them greater influence over creative decisions, content control, and final editing. This can place the Chinese side in a relatively passive position, potentially restricting or distorting cultural expression and value transmission. Some co-productions might deliberately cater to perceived "international tastes," diluting authenticity and cultural depth. Additionally, co-production projects inherently involve complex cross-cultural communication and coordination issues, including differences in creative vision, working methods, and legal contracts, demanding high project management and execution capabilities. Therefore, maintaining cultural confidence, striving for equitable voice, and achieving mutual benefit are strategic imperatives China's documentary industry must address seriously in international cooperation.

3. A Study on the Upgrading Path of China's Documentary Industry

In view of the structural difficulties within the global value chain (GVC), China's documentary industry must actively seek transformation and explore an upgrading path aligned with its unique characteristics to achieve the leap from a "middle to low-end" to a "mid-to-high-end" position. This path should not be a one-dimensional breakthrough, but a

systematic process involving the coordinated development of technological innovation, market expansion, and industrial chain integration. Technological innovation serves as the engine, providing new possibilities for content creation, improving production efficiency, and enhancing product value-added. Market expansion charts the direction, helping Chinese documentary companies break through existing barriers and build more diversified and stable international communication networks. Industrial chain integration forms the foundation, optimizing industry dynamics, improving overall competitiveness, and strengthening anti-risk capabilities. This chapter will delve into these three dimensions, exploring specific strategies and potential pathways for the industrial upgrading of China's documentary sector.

3.1. Technological Innovation: Digitalization and AI-Enabled Content Production

Amid the accelerating wave of digital transformation in the global documentary industry, technological innovation has become a key variable determining industrial competitiveness. For China's documentary sector, actively embracing cutting-edge technologies such as digitalization and artificial intelligence (AI) is not merely an aspect for improving production efficiency and visual performance; it is a core driver for achieving narrative innovation, enhancing interactive experiences, and thereby boosting the value-added of content. Technological empowerment will provide a powerful engine for elevating China's documentary industry within the global value chain.

3.1.1. AI Technology Applications: Historical Scene Reconstruction and Data Visualization

The advancement of AI technology, particularly generative AI and computer vision, has brought transformative changes to documentary creation, especially for historical and macro-narrative subjects. When dealing with historical events or abstract concepts, traditional documentaries are often constrained by a lack of visual archival material, relying heavily on static images, expert interviews, and establishing shots, making it difficult to provide audiences with an immersive experience. AI technology can effectively compensate for this shortcoming. For instance, AI-driven image generation and restoration techniques can restore blurred or damaged historical photographs, or even create realistic historical scenes and objects based on textual descriptions or sketches, achieving a qualitative leap in "scene recreation." This technology not only significantly enhances the visual impact of the work but also helps audiences understand history more intuitively and deeply.

Furthermore, AI applications in data visualization provide powerful tools for presenting and interpreting complex information. Discussions of macro-themes such as the "Belt and Road Initiative" often involve vast amounts of economic data, trade routes, and traffic flows. Relying solely on commentary to convey this information can be dry and difficult for audiences to absorb effectively. With AI technology, this data can be transformed into dynamic, intuitive charts, map animations, and infographics, bringing abstract numbers and concepts to life. For example, documentaries like *Building the Future Together* and *Silk Road: Journey to Start Again* utilized map animation formats to visualize Belt and Road routes and data, greatly expanding the visual expressiveness and offering a more novel viewing experience. This data-driven narrative approach not only

enhances the scientific rigor and informational depth of the film but also meets the contemporary audience's aesthetic demand for information visualization, thereby significantly increasing the content's added value.

3.1.2. Digital Production: Improving Production Efficiency and Visual Performance

The widespread adoption of digital production technology has been a crucial foundation for the rapid progress of China's documentary industry in recent years. From HD, 4K to 8K ultra-high-definition shooting, from camera gimbals to drone cinematography, from digital intermediate (DI) to virtual production (VP), digital technology permeates the entire documentary production process, dramatically improving both the visual performance and production efficiency of films. For instance, the *Aerial China* series achieves its breathtaking "God's-eye view" largely due to the mature application of aerial photography technology and stabilized gimbal systems. These technologies not only reduce the cost and risk associated with aerial filming but also enable complex camera movements previously difficult or impossible to achieve, delivering unprecedented visual spectacles to the audience.

In post-production, digital technology plays an equally vital role. Powerful non-linear editing software, color grading software, and visual effects (VFX) software allow creators to meticulously sculpt the image, achieving a wide range of sophisticated visual effects. For example, digital color grading can unify elements shot under different lighting conditions and locations to create unique visual styles and atmospheric moods. CG effects can create scenes impossible to capture physically, such as restorations of ancient artifacts or visions of future worlds. The application of these technologies not only elevates the artistic standard of the film but also enhances its market competitiveness. More importantly, the standardization and modularization of the digital production process make documentary production more efficient and controllable, facilitating the industry's development towards specialization and scale. This is of strategic significance for improving the overall productivity and quality stability of China's documentary industry.

3.1.3. Technology-Driven Narrative Innovation: Enhancing Interactivity and Immersion

Technological innovation is not merely a tool for improving production quality; it is also a catalyst for driving narrative innovation. Empowered by digitalization and AI, narrative formats in documentaries are evolving from traditional linear, one-way "viewing" models towards more interactive and immersive "experiential" modes. This narrative innovation opens new avenues for enhancing user engagement and content value-added.

For example, Virtual Reality (VR) and Augmented Reality (AR) technologies allow viewers to "step into" the scenes depicted in the documentary, interact with objects and elements within those scenes, and experience a profound sense of immersion. This new narrative format is particularly suitable for documentaries on topics like history, culture, and natural science, greatly stimulating the audience's desire for exploration and interest in learning.

Additionally, AI technology can be leveraged to achieve personalized narrative experiences. By analyzing users' viewing behaviors and interest preferences, AI can dynamically adjust narrative pacing, recommend relevant background information, and even generate different storylines, providing a unique viewing experience for each

user. This "tailored for thousands" narrative mode will significantly enhance content appeal and user stickiness. For instance, a documentary about the "Belt and Road" could emphasize different aspects—trade, culture, or people-to-people connections—based on the individual user's interests.

Simultaneously, new media platforms provide a vast stage for interactive storytelling. By incorporating interactive elements such as pop-up windows, polls, and Q&A sessions within the video, audiences can be guided to participate in the narrative process, transforming them from passive "viewers" into active "participants." The "bullet screen" feature on platforms like Bilibili is a successful example of interactive narrative practice. It not only enhances viewing enjoyment but also fosters a sense of community around the content. This technology-driven narrative innovation will provide robust support for China to build a differentiated competitive advantage in global markets.

3.2. Market Expansion: Constructing a Diversified International Communication Network

Against the complex backdrop of globalization and counter-globalization trends, China's documentary industry must abandon its dependence on single markets and channels to achieve sustainable "globalization." It needs to construct an integrated, diversified, and risk-resistant international communication network. This requires coordinated development across three levels: international distribution, cross-media communication, and brand-building activities. It necessitates not only "building ships to sail the sea" (establishing controllable distribution channels) but also "borrowing ships to sail the sea" (skillfully utilizing global mainstream platforms and channels). Crucially, it involves enhancing the international visibility and reputation of Chinese documentaries through high-profile brand activities.

3.2.1. International Distribution Network: From Single Platform to Multi-Channel Layout

Currently, the international distribution of China's documentaries still heavily relies on a limited number of international mainstream media or distributors. This single-channel model offers constrained profit margins and weak risk resistance. Should a key partner adjust its strategy or market conditions change, it could lead to significant difficulties in overseas dissemination. Therefore, constructing a multi-channel, multi-tiered international distribution network is a critical task for market development.

This means China's documentary industry needs a "two-legged" strategy. First, it must continue deepening cooperation with top global platforms such as BBC, Discovery, and Netflix. Leveraging their extensive global reach and strong brand influence is essential for pushing high-quality Chinese documentaries into mainstream markets. This requires continuously improving content quality and telling China's stories using internationally resonant narrative language, meeting these platforms' stringent standards for "global hits."

On the other hand, and equally important, is actively exploring diversified distribution channels, particularly strengthening outreach to countries along the "Belt and Road," emerging markets, and developing countries. While individually these markets may not be large, they possess immense collective potential and share a natural affinity with China. Building long-term, stable partnerships with local

mainstream broadcasters and new media platforms in these countries can establish a stronger and broader "foundation." For example, China Media Group (CMG) has established the "China Hour" programming block model in several European countries. By broadcasting Chinese film and television works regularly in fixed time slots, it has successfully created independent and stable overseas broadcasting platforms, significantly increasing market share. Additionally, cooperation should be actively sought with overseas Chinese media, regional international media, and specialized media in various vertical fields to achieve precise audience targeting. By constructing a "pagoda-style" distribution network—with top global platforms as the pinnacle, regional mainstream platforms as the body, and various specialized and localized channels as the base—China's documentaries can achieve both stability and far-reaching impact in the global market.

3.2.2. Cross-Media Communication: Integrating TV, Streaming, and Social Media

In the era of media convergence, audience media consumption habits are increasingly characterized by fragmentation, mobility, and socialization. Single communication channels can no longer meet audience demands nor maximize dissemination effectiveness. Therefore, China's documentary industry must implement genuine cross-media communication strategies, integrating TV, streaming platforms, social media, and other channels to build an all-media, full-scenario communication matrix.

Firstly, it is essential to bridge the gap between the big screen (TV) and small screens (mobile devices), realizing synergy between TV broadcasts and online streaming. After a documentary airs on TV, it should be made available on-demand via mainstream video platforms and dedicated apps to meet users' demand for anytime, anywhere viewing. Simultaneously, online platforms can be used to publish derivative content such as highlights, director/creator interviews, and behind-the-scenes stories, extending the content's lifecycle and keeping the topic relevant.

Secondly, leveraging social media for topic marketing and community operations is crucial. On platforms like Weibo, WeChat, Facebook, Twitter, and Instagram, posting compelling clips, initiating topic discussions, and collaborating with Key Opinion Leaders (KOLs) can effectively attract young users, stimulate sharing and discussion, and foster viral dissemination. For example, the success of the Bilibili platform is largely attributed to its strong community features and interactive bullet-screen comments, which provide fertile ground for documentary transmission. Chinese documentaries can learn from this model to build their own "fan communities" on social media. Through continuous interaction and content engagement, ordinary viewers can be transformed into loyal fans, establishing a stable private traffic flow. Furthermore, exploring emerging media formats like short videos, live streams, and podcasts to adapt and distribute documentary content is essential to cater to the consumption habits of different platform users and maximize dissemination impact.

3.2.3. Brand-Building Activities: Leveraging International Festivals and Enhancing Impact

International documentary festivals are the "Oscars" of the global documentary world, serving as the premier venues for showcasing works, exchanging ideas, discussing cooperation, and enhancing brand influence. Active participation in and strategic utilization of these platforms is essential for China's documentary industry to expand its international market

presence and integrate into the global business ecosystem.

Firstly, it is imperative to encourage and support more outstanding Chinese documentaries to participate in the documentary sections of the world's top international film festivals—such as Cannes, Berlin, Venice, and Sundance—as well as major dedicated documentary festivals like IDFA (Amsterdam), Hot Docs (Toronto), and Sheffield Doc/Fest. Winning awards or even just being selected at these prestigious events is in itself the highest recognition of a work's quality, which can significantly boost its international visibility and market value. For instance, the China (Guangzhou) International Documentary Festival has attracted numerous top-tier works in recent years, including Oscar nominees and Berlin Bear winners, substantially elevating its own prestige and international standing.

Secondly, China must excel in organizing its own international documentary festivals, such as the China (Guangzhou) International Documentary Festival and the Shanghai TV Festival's Magnolia Awards documentary section, and build them into influential industry platforms. By inviting the world's leading documentary creators, producers, distributors, and platform buyers to China, these events not only promote international exchange and cooperation but also showcase the development achievements and cultural appeal of China's documentary industry to the world. For example, the Guangzhou festival has established partnerships with renowned international festivals like the Venice Film Festival and the Sunny Side of the Doc in France, expanding its "circle of friends" and becoming Asia's largest documentary festival. Additionally, actively organizing overseas promotional activities like themed exhibitions and forums—for instance, hosting special exchange events during the French Sunny Side of the Doc or the German Dok Leipzig festivals—taking the initiative to "go out" and effectively tell China's stories, is vital for enhancing the international brand image of Chinese documentaries.

3.3. Industrial Chain Integration: From Project-Based to Platform-Based Operations

China's documentary industry has long operated primarily on a "project-based" model, forming temporary teams around specific productions that disband upon completion. While flexible, this model lacks stability and sustainability, hindering the formation of scale efficiencies and brand accumulation. It is also detrimental to the deep integration and value extension of the production chain. To achieve industrial upgrading, it is necessary to promote the transformation from a "project-based" to a "platform-based" industrial model. By establishing stable, open, and collaborative industrial platforms that integrate upstream and downstream resources and extend the industrial chain, the systematic competitiveness and value creation capacity of the entire industry can be enhanced.

3.3.1. Value Chain Extension: Developing Derivative Products and IP Licensing

Value chain extension is a crucial link in increasing added value and maximizing returns. For the documentary business, this means moving beyond the single copyright sales model to develop derivative products and IP licensing businesses, transforming a successful documentary IP into a diversified commercial ecosystem.

Firstly, in terms of content development, a series of related

products can be created around the core documentary IP. For example, documentaries can be adapted into books, comics, or audiobooks, or related creative merchandise like clothing, models, accessories, etc., can be developed. These derivative products not only generate additional revenue but, more importantly, continuously reinforce the IP's brand image and expand its influence. The success of *A Bite of China*, for instance, drove strong sales of related books and innovative merchandise, establishing a positive IP ecosystem.

Secondly, regarding IP licensing, documentary IP can be licensed to partners in other sectors for cross-border development and operation. For example, licensing nature documentary IP to game companies to develop related mobile games or VR experiences; licensing historical documentary IP to travel companies to create themed tours or cultural experiences; licensing culinary documentary IP to catering companies to open themed restaurants or launch co-branded products. This cross-border collaboration maximizes IP value and reaches a broader consumer base. The key to successful industrial chain extension lies in adopting an IP operation mindset and engaging in systematic planning and layout from the early stages of documentary creation. This requires creators not only to focus on making a good film but also to conceptualize how to build an IP with longevity and commercial value.

3.3.2. Platform Operations: Building International Content Production and Distribution Platforms

Promoting the industry's shift from "project-based" to "platform-based" necessitates the construction and operation of internationally competitive content production and distribution platforms. These platforms will serve as "aircraft carriers" that integrate industrial resources, connect global markets, and incubate high-quality IP.

Firstly, on the content production side, creative incubation platforms akin to "studios within a system" can be established. Such a platform can globally solicit outstanding documentary proposals, screen projects with market potential through a professional evaluation system, and provide comprehensive support including funding, technology, and talent. This model can break away from the past "factory-style" production approach, enabling the intensive incubation of ideas and optimal resource allocation.

Secondly, on the content distribution side, it is essential to build one or more Chinese documentary broadcasting and distribution platforms with international influence. This could be a global streaming platform similar to Netflix or a specialized platform focused on a particular niche. Through such platforms, China's excellent documentary works can be showcased to a global audience, achieving scale effects and brand recognition. Simultaneously, these platforms can serve as vital windows for introducing outstanding international documentaries and promoting Sino-foreign exchanges. For instance, Bilibili's successful exploration in the documentary field offers valuable insights for how China might build its own distinctive content platforms. Furthermore, exploring the establishment of a "cloud platform" for the documentary industry, integrating all aspects of the value chain—such as investment, project trading, talent recruitment, equipment leasing, and post-production—online, can realize the digitalization, networking, and intelligent management of industrial resources, thereby improving the operational efficiency of the entire industry.

3.3.3. Policy Support: Catalyzing International Cooperation via Initiatives like the Belt and Road

Government policy support is indispensable for upgrading China's documentary industry, particularly in fostering international cooperation and expanding overseas markets. Strategic guidance and resource allocation at the national level provide critical backing for industrial advancement.

The Belt and Road Initiative (BRI) currently represents the paramount strategic opportunity for Chinese documentaries seeking global reach. Policymakers should persist in encouraging and guiding documentary institutions to produce high-quality BRI-themed co-productions. This can be facilitated by establishing dedicated funds, offering tax incentives, and organizing international co-production matchmaking events, thereby bridging collaboration between Chinese and foreign creators and production entities.

Beyond the BRI framework, the government can bolster the industry's international development through multiple channels:

Enhanced Festival Participation: Increase funding support for documentaries selected for top-tier international festivals to bolster their global presence.

Targeted Overseas Promotion: Organize thematic "China Documentaries" promotional events abroad to elevate the sector's international brand image.

Expanded Co-production Agreements: Advocate for signing more bilateral film and television co-production treaties, providing legal safeguards and policy facilitation for Sino-foreign partnerships.

Specialized Talent Cultivation: Strengthen training for professionals with international vision and expertise in global market dynamics, such as international producers, distributors, and marketing specialists.

As highlighted in UNCTAD reports, government policies are crucial in shaping a country's future comparative advantage. By formulating and implementing a series of precise and effective industrial policies, the Chinese government can create a more favorable external environment for the transformation, upgrading, and rise of China's documentary industry within the global value chain.

4. Conclusion and Prospect

4.1. Challenges and Opportunities in the Global Value Chain

Comprehensive analysis reveals that China's documentary industry stands at a pivotal juncture within the global value chain (GVC), confronting intertwined challenges and opportunities.

Structural challenges remain pronounced:

Market Imbalance: Over-reliance on major European and North American markets.

Content Value-Add Deficiency: Relatively low added value stemming from constrained narrative diversity and limited international appeal, hindering the deep transformation of cultural assets.

Limited GVC Integration: Concentration in mid-to-low-end production segments, resulting in a weak position in global profit distribution.

Collectively, these challenges constitute a significant "glass ceiling" for the industry's upgrading ambitions.

Significant countervailing opportunities exist:

Robust Policy Backing: The "Going Global" strategy and the Belt and Road Initiative (BRI) provide unprecedented

policy support and access to international markets.

Global Streaming Surge: The explosive growth of the global streaming market and its insatiable demand for diverse content offer a direct "fast track" to global audiences.

Technological Leapfrogging: Rapid advancements in AI, big data, VR/AR, and cloud computing furnish the technical foundation for "leapfrog development" ("curve overtaking") through innovation in content creation, production efficiency, and distribution methods.

The core imperative for China's documentary industry is thus to effectively convert these external opportunities into internal drivers of sustainable industrial development.

4.2. A Synergistic Framework for Industrial Upgrading

The three interconnected upgrading pathways proposed—technological innovation, market expansion, and industrial chain integration—form a cohesive and progressive strategic framework for the industry's future:

Technological Innovation as the Fundamental Driver: Beyond enhancing efficiency and visuals, it serves as the core engine for narrative innovation, interactive experience enhancement, and increased content value-add. AI and digital technologies can empower Chinese documentary makers to overcome creative bottlenecks and forge differentiated competitive advantages globally.

Market Expansion as the Necessary Condition: Building a diversified, integrated international communication network is paramount for amplifying global influence and brand value. Strategic shifts—from single platforms to multi-channel layouts, traditional media to cross-media dissemination, and leveraging international festivals for branding—aim to systematically elevate the global visibility and market competitiveness of Chinese documentaries.

Industrial Chain Integration as the Ultimate Goal: Transitioning from a "project-based" to a "platform-based" model is key to fundamentally optimizing industrial structure, bolstering overall competitiveness, and enhancing risk resilience. Through value chain extension and platform operations, the industry can master core GVC segments, evolving from a "content provider" to an "industry integrator and operator," thereby capturing greater systemic value.

These pathways are mutually reinforcing: Technological innovation yields more compelling products for market expansion; market expansion creates broader commercial space for chain integration; and integrated industrial chains provide the robust platform and resources underpinning sustained innovation and market growth.

4.3. Forecast of Future Development

Looking ahead, the development of China's documentary industry within the global value chain is expected to exhibit the following trends:

Deep Integration of Content Excellence and Technology Empowerment: Future competition will be a dual contest of content and technology. Chinese documentaries will place greater emphasis on leveraging thematic advantages while utilizing AI, VR/AR, and other technologies to achieve narrative innovation, creating more immersive and interactive audiovisual experiences.

IP-Based Operations Becoming Industry Standard: As market competition intensifies, reliance on a single copyright sales model will become unsustainable. The development and operation of IP around high-quality content throughout the

entire production chain will become an inevitable choice for leading production organizations and platforms. This will propel China's documentary industry from an era focused on "creation generation" towards "product generation" and "brand generation."

Diversification and Deepening of International Cooperation Modes: Sino-foreign co-production will remain an important form, but cooperation models will diversify, evolving from simple "borrowing ships to sail the sea" (using foreign channels) to "joint shipbuilding" (co-creating platforms/content). Concurrently, partners will expand beyond traditional Western mainstream media to include countries along the "Belt and Road" route, emerging streaming platforms, and independent production houses worldwide, building a more balanced and stable international cooperation network.

Platform Giants Leading the Industry Landscape: The future landscape of China's documentary industry will be led by a few platform giants possessing strong capabilities in content, technology R&D, international distribution, and IP operations. These platforms will integrate upstream and downstream resources of the industrial chain, forming powerful scale effects and brand effects, representing China in competing with international giants within the global documentary market.

In conclusion, the path for upgrading China's documentary industry will not be smooth. However, by adhering to a strategic direction focused on content excellence, technological empowerment, market orientation, and industrial integration, it holds the potential to achieve a shift in the global value chain—from "following" to "running in parallel" or even "leading"—and contribute more excellent works, imbued with both Chinese and global perspectives, to the world.

References

- [1] Wang, L. S. (2024). Feasibility study on the marketization of university students' documentary works under the background of media convergence. *Public Relations World*, (24), 148–150. <https://doi.org/10.19395/j.cnki.1674-246x.2024.07.014>.
- [2] Wang, Y. T., & Liu, J. (2024). Exploring the path of brand building for Chinese documentaries under deep media convergence. *Audiovisual*, (7), 63–67. <https://doi.org/10.19395/j.cnki.1674-246x.2024.07.014>.
- [3] Han, F. (2024). State, market, and people: Subject collaboration and functional expansion of Chinese documentaries. *Modern Audiovisual*, (3), 5–9. <https://doi.org/10.15981/j.cnki.dongyueluncong.2022.12.008>.
- [4] Zhang, P. F. (2023). How Chinese documentaries can break through to the world. *New Chu Culture*, (5), 49–52. <https://doi.org/10.19932/j.cnki.22-1256/F.2021.04.062>.
- [5] Wang, J. C. (2022). Study on the transformation of marketization concepts in Chinese TV documentaries (2011–2021). *Dongyue Tribune*, (12), 62–72. <https://doi.org/10.15997/j.cnki.qnjz.2020.30.037>.
- [6] Tian, T., & Wang, G. (2021). Research on international marketing strategies for Chinese film and television documentaries in the context of globalization. *Modern Marketing*, (12), 62–64. <https://doi.org/10.19932/j.cnki.22-1256/F.2021.04.062>.
- [7] Han, F., & He, S. L. (2020). Building international communication capacity for Chinese documentaries: Historical paths and current dilemmas. *Modern Communication (Journal of Communication University of China)*, (12), 116–120. <https://doi.org/10.19395/j.cnki.1674-246x.2024.07.014>.
- [8] Wu, G. E. (2020). Second-season Chinese documentaries from the perspective of cultural industry. *Young Journalist*, (30), 81–82. <https://doi.org/10.15997/j.cnki.qnjz.2020.30.037>.