

## Critical Cultural Industries Studies: A New Approach to the Korean Wave in the Netflix Era

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This article discusses the emergence of the Korean Wave from the media industry perspective to better understand the cultural industries in the digital platform era. It documents several major theoretical frameworks, including critical political economy, cultural industries, production studies, and critical media industry studies. It also explains why these existing media industry studies may not fully help to understand the Korean Wave, particularly in the digital platform era. To historicize the growth of the Korean Wave, it uses “critical cultural industries studies,” which is a meso-approach, as a reliable media industry study methodology in tandem with Hallyu studies, therefore assisting in defining and clarifying the shifting global cultural industries.

*Keywords: critical cultural industries studies, media industry, the Korean Wave, digital platforms*

The Korean Wave has become one of the most significant cultural phenomena in the global cultural sphere in the early 21st century. The Korean Wave (*Hallyu* in Korean)—referring to the rapid growth of local cultural industries and the global popularity of cultural products in the global cultural markets—began with a few Korean TV dramas in the mid-1990s, which first gained popularity in a few East Asian countries. The Korean Wave has also been led by the successes of Korean films and a few K-pop musicians, meaning that several cultural industries have advanced their cultural content to become globally prominent.

There are several cultural industries driving the global popularity of Korean cultural content, but the increasing role of digital platforms for both local cultural creators and global fans has become a game changer since the early 2010s because they now operate as new mediators for the circulation and consumption of local cultural content. Many local cultural creators, including television producers, filmmakers, and K-pop musicians, work with digital platforms because they not only substitute for incumbent cultural companies but also function as new cultural agencies in cultural production. Netflix and Disney+ have invested in Korean popular culture to attract global audiences who want to enjoy Korean cultural

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content. Because of the global penetration of Korean cultural content, scholars in several disciplines, such as media studies, area studies, film studies, sociology, and anthropology, have paid attention to the transnationalization of local popular culture, but they have shown different perspectives partially based on their disciplinary programs.

The cultural turn in the social sciences and the ethnographic turn in the humanities over the past three decades have pushed scholars to look at cultural industries with new eyes, meaning that we may need to advance new approaches to reflect a shifting media environment (Mayer, Banks, & Caldwell, 2009). It is necessary to use the industry perspectives because cultural industries are closely related to various major actors, such as production studios that create cultural programs, global media conglomerates that possess studios and services, and governmental agencies that allocate necessary funds and set policies. Those studying cultural industries have analyzed the production of a few series, the process by which various cultural firms select and schedule programs, the histories of the regulatory agencies and governmental bodies that have shaped the cultural industries, and the textual consequences of international trade practices, among many other aspects of creating and circulating cultural content (Gray & Lotz, 2019). Nevertheless, these emphases still miss a few significant elements, such as the audiences not only as consumers but also as producers; the emergence of digital technologies, particularly digital platforms; and cultural creators not as individual players but as connected actors.

This article discusses the emergence of the Korean Wave from the media industry perspective in the digital platform era. It documents several major theoretical frameworks, including critical political economy, cultural industries, production studies, and critical media industry studies. Then, it explains why these existing media industry studies may not fully help to understand the Korean Wave in the digital platform era. By critically historicizing the growth of Hallyu, it introduces and uses “critical cultural industries studies”—a meso-approach—as a reliable media industry study in tandem with Hallyu studies and therefore in the shifting global cultural industries. Unlike existing industry approaches, this perspective examines a few new trends as the primary components, including the increasing role of digital platforms as a significant economic and cultural element. Similar to various existing approaches argued, it articulates power relations in the industry because “the study of media industries has always been part of the examination of the power that media wield on cultures and societies” (Herbert, Lotz, & Punathambekar, 2020, p. 12); however, it interrogates the major differences from existing approaches because digital platforms play a primary role in the realm of the contemporary media industries.

### **The Korean Wave From the Perspective of Industrial Approaches**

In Korea, local cultural industries, such as the broadcasting, film, music, and game industries, have created various well-made cultural products to be exported. In 1998—the early stage of the Korean Wave—the country exported \$188.9 million worth of cultural products; however, it exported as much as \$10.5 billion in 2020 (Ministry of Culture, Sports, and Tourism, 2022). Among these, the game industry has been the most significant segment, given that digital gaming has become popular worldwide. The second largest industry is the character sector at \$715 million in 2020, followed by broadcasting (\$692 million), K-pop (\$679 million), and animation (\$134 million). The film industry has thus far seen the lowest reach in the Korean Wave phenomenon;

in 2020, its export value was only \$54 million (Ministry of Culture, Sports, and Tourism, 2022). Because of the significance of cultural industries and the Korean Wave in the Korean economy and culture, the government, cultural industry firms, and cultural creators have continued to advance new cultural content for both local and global audiences.

As the Korean Wave, in tandem with local cultural industries in the initial stage of growth and in conjunction with digital platforms in the recent New Korean Wave era, has continued to grow, several scholars and media have paid attention to the industrial aspect of Hallyu from industry perspectives. However, it is still rare to see academic discourses on industry approaches in Hallyu studies. According to Yoon and Kang's (2017) analysis, the number of Hallyu research articles written in English was 76 until 2016. Based on the study topics those scholars have analyzed, audiences of K-drama and K-pop (34) were the most frequently analyzed subjects during that period. The number could rise to 39 if including "people" (or their everyday lives) as the main subject of observation. There were 11 studies on the analysis of media texts, such as videos, lyrics, and blogs. There were ten studies on the media industry; however, because they focus on flows (export/import) and consuming behaviors, they are not directly related to the industry category, including production and labor issues. Only a limited number of scholars have paid attention to the Korean Wave from a cultural or media industry perspective, although the production of popular culture is closely related to the national cultural industries.

A few scholars used political economy in analyzing different cultural industries. Ryoo (2018) discussed the Korean film industry, focusing on its discursive strategies, policies, regulations, and other initiatives. Kim (2018) exemplified female idols' proliferation in the K-pop industry; he critically analyzed structural conditions of possibilities in contemporary popular music. Meanwhile, Kim (2014) examined the growth of K-pop and the Korean Wave as the cultural industry by analyzing various legal measures, including the Cultural Industry Promotion Act, which played a pivotal role in the foundation for the development of the Korean Wave.

However, these existing works did not include the emergence of digital platforms as major forces in the local cultural industries. They also did not thoroughly analyze the critical role of global audiences in their industry analyses. Therefore, the present article not only fills the gap of the Korean Wave as a cultural industry but also provides new perspectives in understanding the Korean Wave as a potential case of the emergence of local cultural industries in the global cultural industries.

### **Evolution of Media Industry Studies**

Over the past several decades, many theoreticians have developed various approaches in media industry studies. Mainly based on the dichotomy of political economy and cultural studies, they sometimes emphasized critical political economy-based industry studies, while, at other times, they focused on the meaning of cultural text in tandem with media industries. This section delves into the historical development of these approaches based on a few focal points, including the power relationships, between different players in cultural production. It discusses the major advantages and disadvantages of incumbent approaches in media industry studies.

### ***Critical Political Economy Approach***

The media industry has been an essential concept in the area of media studies, usually labeled the “political economy of culture” since the 1970s (Schiller, 1989). Among academics in this school of thought, the primary approach to the industry can be identified as critical political economy. Based on differing interpretations and adaptations of Marxist theory, political economists have focused on the structural aspect of media corporations and media systems. Policy concerns were often central in this critical, neo-Marxian analysis field (Winseck, 2011).

What the political economy of media has emphasized is the “historical phase of the progressive capitalization of the private-sector media industry” (Knoche, 2021, p. 326). Here, media production is also “more intensively subjected to the ‘laws of motion’ and ‘constraints’ of production and capital valorization of profit maximization and competition” (Knoche, 2021, p. 326). The essential features of this drive for capitalization is a structural change in the media industry, which is evident in “the increasing commercialization of media content production as commodity production” (Knoche, 2021, p. 327).

McChesney (1999) has been a critical figure in the political economy of media when it comes to the media industry because he took the media industry as a serious object of analysis. The critical political economy of media has emphasized the increasing role of a handful of media giants, with power concentrated at the top, while not paying enough attention to cultural content and cultural creators—the labor issue (Winseck, 2011). Therefore, Mosco (2009) attempted to develop a dynamic view of the political economy of communication, which he defined as the “study of the social relations, particularly the power relations, that mutually constitute the production, distribution, and consumption of resources” (p. 24). Political economy recognizes not merely economic concerns but also political and moral concerns. This means the political economy is inherently concerned with the ideological (Nicholas & Martinez, 2019, pp. 1–2). As Murdock and Golding (2005) argued, the cultural industries are important objects of study because “the commercial media play a pivotal role in organizing the images and discourses through which people make sense of the world,” while “media corporations are significant economic actors” (p. 60).

More specifically, the political economy of communication is interested in not only understanding the production and distribution of media content but also how we might resist the problems presented by the capitalist control of media and communication (Gandy, 1992; Nicholas & Martinez, 2019). It later saw digital technologies as part of a broader range of cultural industries involved in the production, structuring, and dissemination of culture. Dan Schiller (1999) emphasized the significant role of digital media by pointing out “networks as directly generalizing the social and cultural range of the capitalist economy” (p. xiv). Critical political economy is broadly concerned with studying power relations in society during the process. However, critical political economy has not paid attention to content and audiences in general, although some political economists provide their thoughts on consumers as part of the “broad patterns of cultural product, distribution and consumption” (Garnham, 2005a, p. 486). Because of the lack of discussions on cultural creators, consumers, and cultural content, other approaches—including the cultural industries school, production studies, and critical media industries studies—have emerged, although their focuses are not mutually exclusive.

### ***The Cultural Industries School***

Another primary school to analyze the media industry is the cultural industries school, which can be primarily identified in the tradition of political economy. The rise of the cultural industries was very much bound up with the growth of mass culture. Reacting against what they saw as the misleadingly democratic connotations of the term mass culture, Horkheimer and Adorno (1947/1979) developed the idea of the culture industry as part of their critique of the false legacies of the Enlightenment. The term was intended to draw critical attention to "the commodification of art" (Hesmondhalgh & Pratt, 2005, pp. 3–4). The cultural industries approach has been the primary frame that media scholars take to understand the cultural industries and the concept of culture more generally. It also goes beyond the political economy of media to encompass cultural studies components. As Winseck (2011) articulated, the cultural industries school has drawn judiciously from different strands of political economy, differentiating it from the critical political economy of communication.

A significant point of this approach is the shift of the term from the cultural industry to the cultural industries, implying the change in a few important areas. As Garnham (2005b) argued, "the term now widely adopted—cultural industries—did not now indicate a simple replay of the Frankfurt School's analysis" (p. 18).

Far from rejecting economism, [the Cultural Industries school] took the term "industries" seriously and attempted to apply both a more detailed and nuanced Marxist economic analysis and more mainstream industrial and information economics to the analysis of the production, distribution, and consumption of symbolic forms. (Garnham, 2005b, p. 18)

Accordingly, the cultural industries school has developed the idea that different segments of the cultural industries cannot be treated as the same thing because of the crucial organizational differences that exist between what they call publishing (e.g., books, music, film), flow (e.g., broadcasting), and editorial (e.g., the press) models (Miège, 1987; Winseck, 2011). However, the cultural industries school still does not pay attention to the roles of audiences, and its emphasis on cultural creators is relatively less focused.

### ***Production Studies***

Because of the paucity of discussions on working practices in the media industry discourse, production studies appear to be "an adequate analysis of the organizational forms and working practices associated with the cultural industries" (Hesmondhalgh & Pratt, 2005). This analysis has been characterized in terms of the production of the culture model. The two sets of new entrants to the (sub)field have made their presence in production studies: "one group coming from business and management studies, and in some cases from economics; another group coming from various humanities backgrounds and laying claim to the term cultural studies" (Hesmondhalgh & Saha, 2013, p. 181). With two open-source animation film production cases in Sweden, Velkova and Jakobsson (2017) used these two different approaches, and their theoretical approach expands the concept of "moral economies" from the critical political economy with "regimes of value" from anthropological work. Production studies can be situated between critical political

economy and cultural studies. Mayer and colleagues (2009) also emphasized the nexus of political economy and cultural studies. Production studies scholars, as contributors to a field of interdisciplinary inquiry, draw their intellectual impetus from cultural studies to look at the ways that culture both constitutes and reflects the relationships of power. This is not an objective unique to cultural studies but is still an objective (Mayer et al., 2009).

Accordingly, the notion of power in production studies has been different from other industry studies. Unlike in political economy, which emphasizes lopsided power relations between a few mega-media giants, other small media companies, and general audiences, production studies see that "a centralized and top-down model fails to capture all the aspects of power relations" in cultural production; therefore, "a more productive starting point is that television production necessarily involves negotiation between different participants" (Zeng & Sparks, 2019, p. 56).

Cultural production is indeed tied to questions of power. There are hierarchies of power that enable some actors to move between different spheres and reconcile the different values regimes. The power relationships underlying these work conditions "not only hinge on access to economic capital but are also related to the position of the actor in relation to different regimes of value," which asks researchers to investigate "the multi-faceted relationships between the different regimes of value" (Velkova & Jakobsson, 2017, p. 27). Therefore, the analysis of relations between creative workers and the other elements, including political participants, data analytics, and global power structures, is central to the production studies approach.

More importantly, production studies take the "lived realities of people involved in media production as the subjects for theorizing production as culture" (Mayer et al., 2009, p. 4). Because of the evolution of cultural production in different fields, scholars in production studies have offered different approaches. They emphasize that "the production of culture model tends to be focused on organizational relations and the ways in which practices and processes yield specific outcomes" (Havens, Lotz, & Tinic, 2009, p. 240). Peterson and Anand (2004) also argue that "the production of culture perspective focuses on how the symbolic elements of culture are shaped by the systems within which they are created, distributed, evaluated, taught, and preserved" (p. 311). Meanwhile, du Gay (1997) points out that cultural production studies adopt a global focus on cultural industries and how cultural products are produced, marketed, and sold. Production studies also consider not only the "production processes, products and services" but also "the nature of labor markets that enable us to speak of these sectors in a collective sense" (Flew, 2012, p. 83).

However, production studies have not meaningfully considered customers or audiences as part of their analysis, although they are now crucial components of cultural production with the increasing role of digital platforms. As Duffy (2017) discussed, the empowerment of prosumers in the cases of fashion bloggers, YouTubers, and Instagram influencers is significant, and several production studies scholars certainly analyzed consumers as creative laborers; however, their analyses mainly focused on individual consumers rather than mass audiences or least fans who consume cultural content while providing cultural activities that eventually provide reliable feedbacks and discussions to cultural creators in (mass-)cultural production.

### ***Critical Media Industry Studies***

There is another important approach in media industry studies as a midlevel framework that is rooted in cultural studies. The tradition of critical media industry studies can be found in the history of critical cultural media studies, distinguishing it from other forms of industry analysis, particularly macro-level political economy. This relatively recent approach can be part of critical cultural studies, which "emphasizes the complex interplay of economic and cultural forces, as well as the forms of struggle and compliance that take place throughout society at large and within the media industries in particular" (Havens et al., 2009, p. 235). Amid increasing concerns about the lack of its scope in the system and industry in cultural studies, critical media industry studies have emphasized the study of the media as an industry, although the distinction between production studies and critical media industry studies remain somewhat vague (Gray & Lotz, 2019).

To begin with, unlike political economy that predominantly focuses on the significant level operations of media institutions, critical media industry studies are "primarily interested in the production of entertainment programming, thus limiting the usefulness of many political-economic theories and perspectives, which are based on the industrial analysis of news" (Havens et al., 2009, p. 235). Critical media industry studies are concerned with the pivotal role that media institutions play in "organizing the images and discourses through which people make sense of the world," which means that this approach believes that the critical political economy approach to the media industry shows "general inattention to entertainment programming, and incomplete explanation of the role of human agents (other than those at the pinnacle of conglomerate hierarchies) in interpreting, focusing, and redirecting economic forces that provide for complexity and contradiction within media industries" (Havens et al., 2009, p. 235).

Second, critical media industry studies interpret power not as pessimistic but through productive meanings. The notion of power in critical media industry studies proves that this approach "is rooted in cultural studies theories that examine power as it operates within media organizations and allows for the agency of those workers that are negotiated with the macro-level structures of capitalism and the relations of power it creates" (Gray & Lotz, 2019, p. 114). In line with an overall shift in the intellectual discourse away from theories of power as externally imposed, scholars have attempted to give more weight to how cultural workers shape their works to construct and deconstruct the existing relations of power (Lee, 2012; Zeng & Sparks, 2019). Rather than envisioning power as a form of economic control over media organizations and laborers, it understands "power as productive" because it mostly produces particular ways of "conceptualizing audiences, texts, and economics. Critical media industry studies have especially criticized the overall emphasis on economic and institutional power over creative workers" (Havens et al., 2009, p. 248). In other words, this school argues that "the emphasis on ownership and market logics elides the complex workings within the media industries where cultural workers negotiate every facet of the production process in ways that cannot be easily predicted" (Havens et al., 2009, p. 248).

Third, critical media industry studies are a meso-level approach that attempts to account for both media structure and agency, as well as power and resistance in media industries (Cunningham, Craig, & Lv, 2019). A few significant characteristics of the critical media industry studies framework include a midlevel view of industry operations. It focuses on "the ability of individuals to act independently and make their own

free choices,” whereas the structure is those “factors of influence such as class, gender, religion, ethnicity, etc., that determine or limit the decisions and choices an agent makes” (Milne, 2013, p. 35). Within industry operations, “a Gramscian theory of power that does not lead to complete domination, and a view of society and culture grounded in structuration and articulation” (Havens et al., 2009, p. 243).

There are some problems in critical media industry studies. Like production studies, critical media industry studies posit creative workers as one of the major research interests as they are primary players in cultural production. However, it does not emphasize the audiences as cultural creators, although they actively participate in a meaning-making process. They consume entertainment content, produce content themselves, and provide necessary information to cultural creators in traditional cultural institutions. Unlike the critical political economy, production studies and critical media industry studies put questions of media labor and institutional context in dialogue with debates about identity, meaning, and representation (Jin, 2021a; Johnson, 2014; Mayer, 2011; Mayer et al., 2009); in some cases, these approaches come with the tendency to “treat media industry insularly, artificially cordoning off its work cultures from the realm of consumption” (Johnson, 2014, p. 50). The subsequent two sections discuss a new theoretical framework in media industry studies, differentiating itself from existing media industry studies, with the case of the Korean Wave and digital platforms.

### **Critical Cultural Industries Studies Toward the Korean Wave**

There are various reasons why media scholars may consider that the Korean Wave does lend itself to critical cultural industries studies analysis. Critical cultural industries studies are a form of meso-approach in industry studies, neither the political economy nor cultural studies-driven approaches. Scholars in several academic fields still have difficulties in defining the Korean Wave and finding appropriate theories, mainly because the Korean Wave entered public consciousness relatively quickly in the early 21st century. As discussed, although the political economy of communication has used institutional analysis and historical approaches, most qualitative research on the Korean Wave has been derived from cultural studies, focusing on audience or fan studies, whether they are diaspora Asians or global fans. Much scholarly analysis and discourse about Hallyu argue that they can be understood not only as texts but also as cultural artifacts that are given value, meaning, and position through their production and use by media users (Crawford & Rutter, 2006). Several of those studies using diverse methodologies have focused on the cultural aspects of Korean cultural content.

However, this new approach is related to the unique position of the Korean Wave in academic disciplines, and it can be applied to transnational cultural flows mainly developed from non-Western regions. As is well documented, whereas “critical political economy has been institutionalized within social science” and draws its major practitioners from people trained in economics, political science, and sociology, “departments and programs of cultural studies are still mostly studied in humanities and mainly pursued by scholars drawn from literary and art historical studies, and from anthropology and other disciplines concerned with the micro-politics of everyday meaning-making” (Murdock & Golding, 2005, p. 61). The Korean Wave has been studied in both social sciences, including political science, public policy, marketing, sociology, and communication—focusing on cultural policy on Hallyu and Hallyu marketing, production, systems—and humanities, such as anthropology, geography, Asian studies, and literature, primarily

analyzing fandom and cultural text. As such, although they overlap in some cases, we cannot put Hallyu only within any specific academic discipline. It is essential to advance our approaches by cutting across disciplinary boundaries, and Hallyu studies should be interdisciplinary in both academic fields and methodological approaches.

Second, it is also critical to discuss the scope of the Korean Wave not from the cultural industry as a singular form but from the cultural industries as a plural form, because there are various separate but connected businesses at work. In Horkheimer and Adorno's (1947/1997) view, culture and industry were supposed to be opposites, because culture should be considered as art rather than a commodity (see Fuchs & Holzner, 2020), but in a modern capitalist democracy, the two had collapsed together. As discussed, the French "cultural industries" sociologists rejected Horkheimer and Adorno's use of the singular term "the Culture Industry" because it suggested a "unified field" where all the different forms of cultural production that coexist in modern life are assumed to obey the same logic. The French "cultural industries" sociologists were concerned with showing how complex the cultural industries are and identifying the different logics at work in various types of cultural production (Hesmondhalgh, 2012, p. 24; Miège, 1987).

The Korean Wave cannot be adequately analyzed through a single cultural industry because several industries, from broadcasting to music to digital games, work together to establish the contemporary Hallyu phenomenon in the global cultural sphere, although scholars may select a particular cultural sector like film, broadcasting, and music depending on their unique study plans. Hallyu's scope also cannot be understood with only a particular media industry or any particular area because it does not represent the entire Hallyu tradition. Korean dramas and K-pop are not the major genres of the Korean Wave; they are only parts of the phenomenon. Likewise, the Korean Wave cannot be explained by cultural policy or audience studies alone. Several previous works focused on a particular sector like K-pop or Korean dramas and claimed that they analyzed the Korean Wave. However, what they understood was a specific area, not the Korean Wave per se. The Korean Wave phenomenon demands that media theoreticians understand the nature of the different industries involved, both audio-visual and digital components, and requires analyzing it as a whole in its relevant historical and sociocultural contexts.

Third, it is crucial to analyze cultural producers as part of industry studies. Unlike production studies and critical media industry studies, theoreticians in several different fields have to explore not only cultural creators in mega-cultural industry firms but also cultural consumers. It attempts to argue that we need to entwine together more complex tales about media in the study of consumers, considering them not only as active audiences but also as viable agencies. In this expansive body of work, scholars see that even the objects of consumption are sites of cultural production as consumers adopt, modify, and repurpose the cultural meanings of domestic tools and media technologies (Silverstone, 2005, as cited in Mayer et al., 2009). The inductive insights of these studies of cultural consumers have "set a new standard for studies of producers" and "the conjuncture of contexts within which they produce meanings" (Mayer et al., 2009, p. 3).

Platform users as customers especially act as cultural producers, who ask theoreticians to analyze their roles in cultural production. In the digital platform era, cultural producers are increasingly platform dependent; however, platform adoption among cultural producers differs among industry segments:

Historically, some parts of the cultural industries—games and social media entertainment—have been platform-dependent, whereas other segments—news and music—have histories far predating platforms. The latter set of industry segments tend to have more options to operate independently from platforms . . . thus, cultural producers becoming platform-dependent by no means signals an all-encompassing logic; nor does it affect all industries equally. (Nieborg, Poell, & Duffy, 2021, p. 3)

Because of the convergence of popular culture and digital technologies, as well as its relation to digital platforms, it is vital to systematically analyze the Korean Wave as a whole, which can be easily done through existing industry studies.

Last but not least, it is critical to converge two different methodological approaches. As discussed here, the Korean Wave is no longer a discrete and distinct sector. As Hesmondhalgh (2012) points out, “a view of the cultural industries and the texts they produce are much more complex, ambivalent, and contested than expected” (p. 5). Toby Miller (2006) also pointed out, “Every cultural and communications technology has specificities of production, text, distribution, and reception” (p. 6). Therefore, the converged methodological framework stands to contribute much to moving research and inquiry forward in Hallyu studies, the public sphere of widespread criticism, state and private policy creation, social movement critique, and labor organization. We perceive these parties as those that allow “us to consider who makes the games, who profits from them, how they target audiences, what the games look like, what they are like to play, and how they fit in with social life” (Miller, 2006, p. 8). It is necessary to “employ political economy approaches and combine them with ethnographic research and in-depth interviews gathered in researchers’ fieldwork to strengthen their major analytical framework,” which necessitates a new theoretical approach (Jin & Chee, 2008, p. 41).

Overall, media theory and methodology must synthesize a wide range of approaches that constitute a multidisciplinary field of research (Jin & Chee, 2008; Wolf & Perron, 2003), and these approaches are essential for understanding the complexity of the Korean Wave. It seems that a complementary structural examination provided by a political and economic approach may satisfy a demand expressed by such cultural researchers of popular culture. It is challenging to cover political, economic, and ethnographic approaches; however, the Korean Wave should be defined based on specific combinations of technical, social, cultural, and economic characteristics and not exclusively on essential ones (Raessens, 2005, p. 373). By examining the Korean Wave as the cultural industries in light of its sociocultural elements and political-economic contingencies, we illuminate some of the underexamined complexities inherent in the conception, development, implementation, and reception of Korean popular culture in the global cultural sphere.

### **Critical Cultural Industries Studies in the Convergence of Hallyu and Digital Platforms**

Digital platforms have been some of the most significant actors in cultural industries, including in the Korean Wave tradition. Again, digital platforms have become primary players in Korea’s cultural production, from the production of popular culture to the consumption of cultural content as they work as cultural mediators. Several local broadcasting companies, either individually or collectively, have launched local over-the-top (OTT)

platforms as their subsidiary cultural agents. They have also produced cultural programs not only for their own channels but also for OTT platforms, as can be seen in MBC's *Physical: 100* (Jang, 2023) for Netflix, which blurs the boundary between traditional broadcasting companies and digital platforms. For local cultural industries, the rapid growth and use of digital platforms seem to open new possibilities.

In fact, digital platforms play a key role in the entire value chain of cultural production. They are not only mere distributors but also powerful producers while working as primary tools for cultural consumption. Therefore, it is vital to follow their development in the light of history, highlighting the intersections with other related concepts, from cultural industries to digital platforms. Understanding the role of digital platforms relates to the broader project that focuses on audio-visual cultural production in general, and especially, those in the Korean Wave (Dwyer & Hutchinson, 2019).

Platform studies have enabled researchers to identify a multitude of key aspects surrounding how cultural programs are produced, circulated, and consumed on these platforms. Helmond (2015) argues that digital platforms are a prominent infrastructure, noting platformization, referring to "the rise of the platform as the dominant infrastructural and economic model of the social web and its consequences;" therefore, "platformization entails the extension of social media platforms into the rest of the web and their drive to make external web data platform ready" (p. 1).

Here, one significant aspect of the novelties-related digital platforms has to do with the articulation of their supply. For a long time, the products of the cultural industries have been available in the market only at certain times. Digital platforms have replaced the logic of traditional cultural industries because of the permanent availability of their products on the Web (Colombo, 2018). As for the supply itself, the conventional production of the cultural industries is linked to the specific stability of the genres, which has allowed an efficient, productive articulation. However, "the acceleration of the production-distribution consumption cycle has progressively reduced traditional rigidities in favor of greater fluidity between genres" (Colombo, 2018, p. 143). Because of the increasing impact of Netflix, for example, since the late 2010s, local cultural creators and cultural industry firms have created new cultural genres, such as zombie and science fiction adventure, which is unprecedented.

Netflix's effects in the Korean Wave have indeed become significant. The number of Netflix's Korean originals, including dramas, films, and reality shows, has meaningfully increased from only six in 2020 to 25 in 2022. In 2023, Netflix planned to create 34 original programs in Korea, including 20 series, 12 films, and two reality shows because it wanted to ride the Korean Wave (Toh, 2023). As part of its plan, Netflix decided to invest \$2.5 billion in Korea between 2023 and 2027 (Liang & Hoskins, 2023). In addition, there are many licensed programs. For example, there were as many as 262 Korean cultural programs on Netflix as of November 1, 2021 (Netflix, 2021). Of course, the primary reason for the growth of Korean cultural content on Netflix is the increasing number of global audience that enjoys Korean cultural programs. As of May 1, 2023, out of Netflix's 231 million subscribers in 190 countries, more than 60% have watched Korean content at least once, including *Squid Game* (Ryall, 2023). Therefore, another set of shifting factors linked to digital platforms concerns their use and valorization. Integrated users are the most evident novelty of transformations in the media industry. The management of the massive flow of information, which is generated by platform users when they click, share, and upload is elaborated by artificial intelligence (AI)

and algorithms advanced by digital platforms, and this can predict and promote personalized consumption options (Jin, 2021b). Unlike traditional cultural industries' reliance on advertising, digital platforms obtain profits "not only through advertising and the sale of products, but also and above all from the increase in network traffic and the sale of users' data" (Colombo, 2018, p. 143).

As Miège (2011) pointed out, "the question of evolution in, and the future of models is part of a larger analysis of the place of cultural industries in contemporary capitalism" (p. 62). For many local cultural creators, therefore, the production of cultural products for digital platforms has become mandatory, which means that they now check whether their products can be released on global OTT platforms. What they want to secure are not only production budgets from global OTT platforms but also guarantees of global consumption.

Meanwhile, with the rapid growth of digital platforms, intellectual property (IP) rights versus author's rights and copyright have become some of the most significant issues in industry studies. Global digital platforms influence non-Western countries by penetrating American corporate ideology, which includes entrepreneurship, personalization, and the role of IP. *Squid Game* (Hwang, 2021) is undoubtedly a Korean television series; however, Netflix is not only working as a cultural outlet but also garnering massive profits. Although Korea is satisfied with the global success of the locally produced cultural program, Netflix has continued to benefit from Korean cultural products' popularity because the platform maximizes its benefits through the monopolization of IP and as the distribution channel.

As is well documented (Shaw, 2021), Netflix estimated that *Squid Game* (Hwang, 2021) could create almost \$900 million in value for the company. Netflix mainly differs from other cultural industries, such as movie studios and television networks, in that it uses its catalog and a steady drumbeat of new releases to attract customers. Most of all, it has big data about consumers' taste. Critics are concerned about whether it is suitable for local productions to allow Netflix to monopolize content rights, based on IP rights, to their shows at a time when the Korean Wave has emerged as a content hub for its globally popular culture. OTT platforms' risk-taking investment strategy limits the IP rights of local cultural creators as OTTs demand the entire IP of the shows they put money (*The Economic Times*, 2021).

As Hesmondhalgh and Lotz (2020) point out, "little is known about the corporate arrangements between devices and services, reflecting the opacity of many of the new cultural intermediaries that now participate in media circulation" (p. 389) in addition to the lack of study about cultural industries in the Korean Wave context. It is critical to delve into digital platforms as mediators, which wield their enormous power in cultural production.

In this light, the notion of power in critical cultural industries studies can be differently emphasized. A few existing industry studies have focused on power in analyzing a handful of media industries by highlighting power relations that are primary elements in constructing and deconstructing the relationships between major players, although their significant approaches are different. Unlike other industry studies, the present approach emphasizes multilayered power relations because distribution power and consumer power (in addition to cultural creators as agencies) play a vital role in the cultural industries.

In a cultural studies tradition, Hall (1986) pointed out, a culturalist perspective, exemplified by Raymond Williams, emphasized human experience and practical activity as the source of culture. In contrast, a structuralist perspective “stressed the structural and ideological features of culture as the ultimate conditions or determinants of human praxis” (Surber, 1998, 240). In readings such as Hall’s, “Williams is seen as paying too much attention to experience and human praxis as opposed to structural conditions and how they infuse these practices” (Surber, 1998, p. 240, as cited in Guillem, 2013). In critical cultural industries studies, one is able to understand the notion of power through the convergence of the structuralist perspective and the culturalist perspective as the major perspective of this new approach is the pursuit of the accurate meso-level framework, which is what a critical cultural industries approach attempts to.

More specifically, digital platforms’ distribution power can be understood through negotiations, cooperation, and conflicts between three major actors, namely media institutions, in this case, digital platforms but not excluding cultural industry firms, cultural creators, and platform users. Digital platforms act as mediators that control the circuit of cultural production, which means that OTT platforms not only distribute cultural content but also produce their original programs. Digital platforms allow cultural creators to enhance their position in negotiation with cultural industries firms as cultural creators. They can select broadcasting channels or digital platforms to distribute their cultural content. Platform users can also participate in cultural production as users and consumers. They provide their taste and preferences while clicking and searching for cultural content on these digital platforms. The recognition of customers who “economically support, symbolically reproduce, and thus practically consent to the industry’s own construction” of the power has been woefully absent in the otherwise diverse range of research on digital platforms (Mayer, 2011, p. 2). As Johnson (2014) points out,

to most effectively grasp the cultural politics of media work, production studies of the media industries could reinvest in the idea of the audience, asking how the sense- and identity-making practices of professional laborers are tied up in ideologies and social hierarchies extending beyond the bounds of industry and into everyday struggles over consumer identity. (p. 51)

Power relations certainly enhance the roles of cultural creators and audiences. Again, platforms open up spaces for negotiations, contestation, and even acts of resistance (Duffy, Poell, & Nieborg, 2019, p. 6). In this light, Nieborg and colleagues (2021) argue that the relations and flows of power between digital platforms and cultural creators should be understood as one of mutual dependence. We cannot deny the increasing roles of cultural creators and audiences as meaningful, but not yet fully powered, agencies.

Of course, this is a complex issue, as digital platforms are becoming central nodes in virtually every cultural industry. Digital platforms equipped with AI and algorithms play a pivotal role, making unbalanced power relations among these three principal actors. The emergence of digital platforms contributes to the institutionalization of a winner-take-all economy practice, and therefore, digital platforms have become frontrunners in data and AI capitalism (Verdegem, 2021). As Colbjørnsen (2021) aptly puts it, platform users and cultural creators, in contrast with digital platform owners, “are seen as particularly vulnerable,”

as digital platform providers “are able to maneuver the network to strengthen their relative position” (p. 1282). In other words,

Users are entirely reliant on streaming providers and must accept the terms specific to the streaming model to gain access, stuck in a network without command over neither database nor device. . . . The data streams to content originators and publishers are provided at the mercy of streaming providers, indicating that the asymmetrical power relations persist. (Colbjørnsen, 2021, p. 1282)

Overall, constructing the audience as the primary actor in Korean cultural industries studies does not automatically mean that they enjoy equal opportunities and therefore equal power. The asymmetrical power relations, notwithstanding cultural creators’ and platform users’ improving negotiation power, have not disappeared and have even intensified. However, the analysis in critical cultural industries studies should not necessarily be pessimistic. Instead, by focusing on the shifting power relations, we turn our attention to understanding the increasing role of cultural creators and consumers. While interrogating the necessity of relevant measures to protect local cultural creation from digital platforms, we also advance new cultural industries’ norms that emphasize fruitful working relationships between digital platforms, cultural creators, and consumers.

### **Conclusion**

This article has discussed the necessity of a reconfigured media industry approach in tandem with the Korean Wave. By developing a new meso-approach termed critical cultural industries studies in tandem with the Korean Wave, it emphasized that we need to analyze the Korean Wave, and in general local cultural industries, more comprehensively and systematically than ever. Hallyu is a non-Western-based cultural phenomenon, and several media scholars have used existing approaches to examine several emerging cultural industries. Because of the lack of their validity as reliable theoretical frameworks in analyzing the Korean Wave, this article introduced critical cultural industries studies, which may enhance our understanding of the emergence of the Korean Wave as the cultural industries. Scholars in different academic fields can fully comprehend the popularity of local popular culture in the global cultural scene by converging structure, audience, and text in the digital platform era.

In particular, it is crucial to acknowledge that an analysis of digital platforms in the Korean cultural industries cannot be the same as traditional cultural industries as digital platforms work as the primary actors in cultural production, from the production of popular culture to the circulation of cultural content. Business and distribution models labeled as digital platforms are no longer a novelty in the media industries, which needs to be examined and conceptualized across media industries (Colbjørnsen, 2021). Cultural creators should also be considered as the central parts of cultural production as they are primary actors in the meaning-making process. The consumers in the digital platform era are not passive audiences. They are actively participating in cultural production: not only uploading their content on social media but also providing their taste to OTT platforms so that they have fundamentally shifted peer audiences’ cultural behavior, although they are not yet gaining equal power.

Digital platforms, cultural producers, and platform users, both local and global, are significantly influencing the creation and circulation of local cultural content in the global cultural markets, which means that they develop transnationality in the cultural industries. We can consider these significant elements, including media text, separately, and focus on their primary characteristics; they also have to analyze the cultural industries systematically but still critically. The Korean cultural industries seem to be a testing bed for global digital platforms and local cultural industries. Understanding the increasing role of Korean cultural content in the digital platform era may provide meaningful perspectives to global media industries, in particular, in the Global South, as they witness the Korean Wave and plan to advance their cultural industries to create other non-Western-based cultural powerhouses.

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