

Research on Korean Cultural Industry Based on Global Production Networks Theory

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한국 문화 산업의 글로벌 생산 네트워크에 관한 연구

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Abstract: As the cultural industry might be regarded as the most intimate industry to the general public, it is relatively easy to be widely accepted. With the development of the internet, not only people in various countries have been closely connected, but production networks around the world might also be connected with each other. This article will use data and case studies to clarify how global production networks operate in the development of the cultural industry. By taking the relatively novel point of contact of connection between global production networks and the development of the cultural industry, it summarizes the development models of the film, television and music sectors in the Korean cultural industries. The study found that the development model of the film, television and music industry from the 1990s to the present could be divided into four phases, and most firms are now in the outsourcing and expansion phase. Relying on the huge production networks, these two industries are likely to be improving their popularity and added value through global cooperation.

Key Words : cultural industry, Korea, global production networks, global value chains, Korean wave

요약: 문화산업은 일반인에게 가장 밀접한 산업이기 때문에 대중들이 비교적 쉽게 접근할 수 있는 산업이다. 최근 인터넷의 발달로 다양한 국가의 사람들이 긴밀하게 연계되고 있으며, 생산 네트워크도 글로벌 수준에서 상호 연계될 수 있게 되었다. 본 연구는 문화 산업 관련 데이터와 사례 연구를 통해 글로벌 생산 네트워크가 문화 산업을 발전시키는 방식과 메커니즘을 규명하고자 하였다. 본 연구는 한국 영화 및 비디오 산업과 음악 산업의 발전 모델을 네 단계로 구분하여 한국 문화산업의 발전 모델을 구축하였다. 이를 통해 본 연구는 한국 영화 및 비디오 산업과 음악 산업이 아웃소싱 전략을 기반으로 규모가 확장되고 있으며, 대규모 글로벌 협력 기반의 생산 네트워크에 의존하여 대중성과 부가가치가 향상되고 있음을 밝혔다.

주요어: 문화산업, 한국, 글로벌 생산 네트워크, 글로벌 가치사슬, 한류

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1. Introduction

Since the first movie was released on the Korean Peninsula, the cultural industry has become an important media that reflects the face of Korean society. In the 1990s, affected by the impact of foreign cultural products and the stimulation of foreign exchange output, South Korea began to pay attention to the development of the cultural industry and eventually set it as the industry to focus on development.

The UNESCO defines cultural industry as “sectors of organized activity whose principal purpose is the production or reproduction, promotion, distribution and/or commercialization of goods, services and activities of a cultural, artistic or heritage-related nature” (Europa Regina, 2019). For this concept, governments of various countries have their own definitions based on their own national conditions. The FRAMEWORK ACT ON THE PROMOTION OF CULTURAL INDUSTRIES proposed by the Ministry of Culture, Sports and Tourism of South Korea defines the cultural industry in South Korea as “industries engaged in the planning, development, manufacturing, production, distribution, consumption, etc. of cultural products and services related thereto” (FAPCI, 2022). This stipulates in detail 11 sectors belonging to the cultural industry. In this paper, we use the definition from FAPCI to approach the industry. Compared with other definitions, it shows how the Korean administration understand and promote the whole industry, so that is more appropriate to this research.

The worldwide Korean wave led by ‘Gangnam Style’ is attracting more and more attention and investment from all over the world, which has also expanded from the music industry to other sectors of cultural industries. Based on the current development model of South Korea's cultural industries, this article attempts to analyze it from the perspective of global production networks (GPNs) and summarize its development model.

2. Theoretical Background: Global Production Networks And Global Value Chains

The GPN theory was proposed in 2002 by Coe *et al.*, drafted as a framework for GPNs and is based on previous value chain theory, the network and embeddedness perspective, actor-network analysis, global commodity chain (GCC), and global value chain (GVC) analysis. GCC and GVC analysis place much greater emphasis on alternative governance structures that are associated with the peculiar configuration of GCCs/GVCs in different industries and sectors, while GPN builds on this by integrating concepts from several previous theoretical directions and applying the framework to the analysis of more complex global economic networks. They consider the three fundamental elements of the GPN framework as value, power and embeddedness and use the four dimensions of firms, institutions, sectors and networks to examine the outcomes and interrelationships of these

three fundamental elements for development. In 2015, Coe & Yeung added the GPN 2.0 theory to complement the GPN theory.

Coe & Yeung (Coe and Yeung, 2015) argued that despite its aim ‘to provide a more generally applicable conceptualization of the GPN’ and its influential role as a heuristic framework in economic-geographical research and the wider social sciences, GPN 1.0 in many ways remains an inadequately developed conceptualization of global production networks. The 2.0 theory is an evolution of the GPN theory because the global economy has changed significantly compared to when the theory was first proposed. On this basis, four types of strategies of global production networks actors are analyzed from the perspective of network actors: intra-firm coordination, inter-firm control, inter-firm cooperation and non-inter-firm games, to illustrate the dynamic development of global production networks, which in turn relates to the practice of regional development can be transferred. The theory of strategic coupling presented in GPN 1.0 is expanded in 2.0 to include the dynamic idea that within strategic coupling there are processes of feedback and decoupling that produce both positive and negative economic development outcomes.

The starting point for the analysis of GPN 2.0 is the concept of a globally important leading company that outsources a significant part of its value creation activities to other companies. It is considered significant in that it has the “capacity to coordinate and control directly its production network—be it in the role of buyer, producer, coordinator, controller, or market-maker,

or a composite of one or more of these roles” (Coe and Yeung, 2015). This development model has gradually emerged in the various sectors of the Korean cultural industry, which has gradually expanded its influence from Korea–East Asia to Asia–World. However, due to the strong country-of-origin nature of the cultural industry, much of the entire production network remains in Korea. However, with the gradual development of the cultural industry, the possibility of some production sectors moving abroad increases. The original GPN conceptual framework, known as GPN 1.0, emphasizes the complex intra-, inter-, and extra-firm networks involved in any economic activity, and how these are structured both organizationally and geographically. It is intended to delimit the globally organized nexus of interconnected functions and operations of firms and extra-firm institutions through which goods and services are produced, distributed, and consumed. The central concern of any GPN analysis should not simply be about considering the networks in their own terms, but should reveal the dynamic developmental impacts on territories interconnected through these networks.

However, Coe and Yeung subsequently found that the GPN 1.0 framework was not yet well developed in some concepts. Though the initial framing identifies three interrelated ‘conceptual categories’ of value, embeddedness, and power, it has not explicitly developed and specified the causal mechanisms linking these elements to the dynamic configurations of global production networks. The later proposed GPN 2.0 framework would enable the GPN project to transform from an essentially descriptive to an explanatory

project. Rather than using GPNs as a heuristic tool to describe spatial–sectoral networks in the global economy, the intent of GPN 2.0 was to (1) identify the competitive dynamics and risk factors that drive firm–specific strategy and behavior, (2) infer how particular combinations of competitive dynamics and risk factors translate into specific types of strategies at the firm–specific level (actor practices), (3) work upward from the scale of firm–level analysis to explain how GPNs come into being, and (4) use this information to interpret the ways in which regional economies strategically couple with lead firms and their associated GPNs to inform regional development (Coe und Yeung, 2015).

The current cultural industry development situation gives the strong supports to the entry point of GPN 2.0 theory. In particular, the role of leading companies is more critical in the music and film industries. The leading company uses the whole networks to ensure that the resource could be maximal used to get benefits. Also, it is likely to be seen as the way to enhance its role in the total network. Therefore, as there are not so many current articles discussing these two related topics, the combination with GPNs and the cultural industry should be significant. The main purpose of the research is to identify the way in which the Korean cultural industry develops under the perspective of the GPNs, while explaining the development situation to find the universal development model is also significant in the industry.

Setting forth firm–level causal drivers in this way ensures that firms are not considered as black boxes, but rather as actors whose behavior

is ultimately driven by both internally and externally shaped, decision–making environments (Neilson *et al.*, 2018). Because different subsectors of the cultural industry are producing in different ways, the following example studies of two major Korean cultural exports are used to illustrate how global production networks functions in the development of the cultural industry.

To this end, a method that combines theory and actual data is mainly used in this article to conduct research. In terms of theoretical research, by reading various documents, an in–depth understanding of the concepts of cultural industry and global production networks has been given. This serves as a basis to enrich and broaden the theoretical level of this article. And the understanding in that part of these two aspects, especially the global production networks, will be integrated into the later analysis. The analysis part mainly uses data from various reports, yearbooks, etc., combined with the theoretical part, so that the data can interpret the current situation of the development of South Korea's cultural industry under the research framework of the global production networks. The data and theory are concretized through case studies. And through these specific cases can explore the development model of South Korea's cultural industry.

3. Literature Analysis

Scott(1999) summarizes: “regions with international cultural leadership have in common that their participation in cultural–economic activities is

based upon dense networks of producers combined with a dependence on complex local labor markets”. There is a large amount of literature indicating (Amin and Thrift, 2007; 2017; Gibson and Kong, 2005; Scott, 2000; 2001) that suggests that culture is best understood as a social phenomenon rather than as an expression of a transcendent individualistic impulse and the output of the modern cultural economy is crucially linked to its social (capitalist) conditions of production. The modern cultural economy almost always takes the form of complex networks of workers within firms, linked by tightly constructed networks of transactions between firms, in which many different “hands” exert an influence on a product during its production period. The characteristics of these networks and the final output are subjected by strong economic pressures, which in the cultural sector often take the form of two mutually exclusive types: One is to save costs through standardized production process. Other one is to resist competition through continuous product differentiation. Yin (Yin and Derudder, 2021) argues that “Cultural industries’ dependence on a large pool of creative labour, extensive local networks of suppliers, access to tacit knowledge, and synergies based on spatial proximity all strengthen their agglomeration in a limited number of major metropolitan areas”.

In this article, a search of 10,811 articles on the topic of cultural industries in Web of Science between 2012 and 2022 is revealed that current research on cultural industries focuses on originality value, identity, time period, location and the cultural industries themselves. Through

further cluster analysis, these keywords can be divided into six clusters, with the clusters “originality value”, which represents value research and the orientation of behavioral research, and “identity”, the sector in which the cultural industry is located, as well as other sub-sectoral research clusters have the most keywords. And the clusters with ‘originality value’, ‘period’ and the ‘cultural industry’ are the three most influential cluster in these research articles. That also means that researchers might pay more attention in these subjects during these 10 years. And the other articles show strong correlation with topics and key words within and outside cluster. “Korean”, “K-pop”, “Korean government”, “Korean wave” are all in originality value and identity two clusters and were averagely released after 2017.

The results also indicates that research on the cultural industries has tended to focus on individual categories or more general studies. There aren't many articles aimed at a specific market segment, and even fewer that focus on GPNs. This suggests that the cultural industry is a topic that needs more attention, but also has significant potential. The theoretical foundation of this literature, coupled with the following data and case studies, provides a clearer picture of the development model of the Korean cultural industry.

4. Data Analysis: Development of the Korean Cultural Industry

Due to Korea's unique development history,

the population of large cities has been significantly larger than that of small and medium-sized cities and rural areas since the 1960s. This pattern of concentration has made the Korean metropolitan area one of the most densely populated areas in Asia and led to a concentration of firms in the area. Figure 1 compares population density data at 1 km resolution ratio with the number of cultural industry firms by region and shows that the number of companies and population density are basically direct proportion (WorldPop, 2020). The number of companies, especially in the metropolitan area, is significantly higher than in the rest of the region. However, when annual sales data are introduced, the

difference between Seoul and the rest of the region is much larger than the number of firms(see Figure 2).

Comparing the data on the number of companies over 5, 10 and 15 years (see Table 1), it can be seen that almost all regions have experienced negative growth, with the exception of Jeju (the data of Sejong City only started from 2017), but most regions are still seeing positive growth in the number of companies compared to 15 years ago. This situation is more related to consolidation within the industry and sluggish economy. The global COVID-19 pandemic that began in late 2019 also had a significant impact on all types of industries, with many smaller

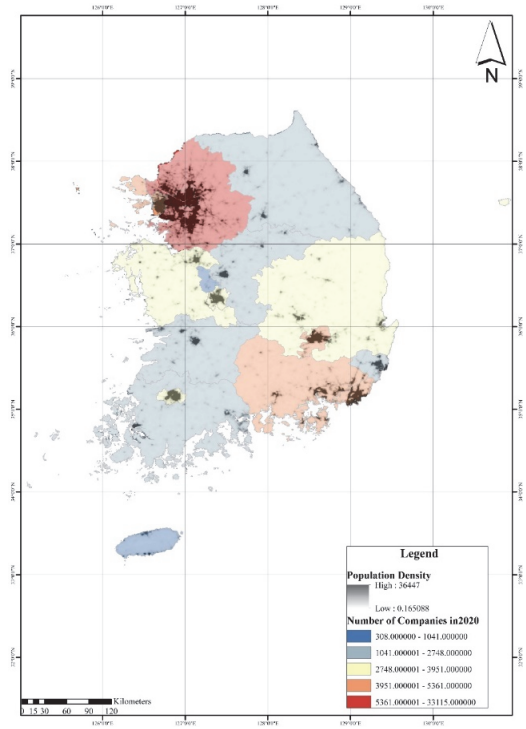


Figure 1. Number of Companies in the Cultural Industry with Population Density
Source: KOSISb, 2021, WorldPop, 2020

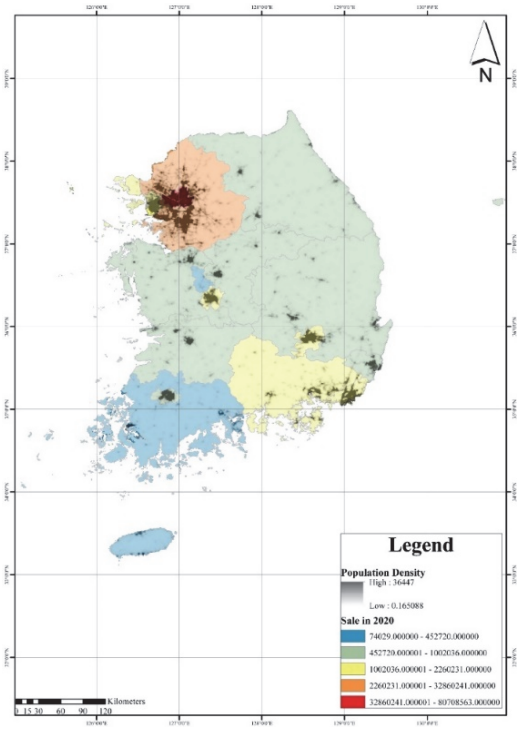


Figure 2. Sales of Cultural Industry with Population Density
Source: KOSISc, 2021, WorldPop, 2020

Table 1. Change rate within 5, 10 and 15 Years of the amount of companies(Based on the situation of 2020)

Region	5Y	10Y	15Y
Seoul	-5.24%	-3.50%	19.73%
Busan	-16.81%	-31.36%	-23.93%
Daegu	-13.31%	-25.67%	-13.59%
Incheon	-7.74%	-22.83%	3.75%
Gwangju	-13.43%	-26.53%	-9.58%
Daejeon	-4.87%	-10.46%	6.20%
Ulsan	-14.57%	-20.18%	-1.14%
Sejong-si	9.22%	-	-
Gyeonggi-do	0.68%	-1.73%	43.76%
Gangwon-do	-5.12%	-20.96%	13.73%
Chungcheongbuk-do	-2.35%	11.28%	40.12%
Chungcheongnam-do	-6.77%	-0.25%	41.36%
Jeollabuk-do	-6.08%	-0.54%	18.91%
Jeollanam-do	-9.55%	-20.32%	-6.43%
Gyeongsangbuk-do	-9.21%	-11.11%	11.14%
Gyeongsangnam-do	-9.88%	-18.53%	-2.45%
Jeju-do	1.46%	15.54%	34.50%

Source: KOSISb, 2021

businesses getting closed in 2020, which also contributed to the decline in the number of businesses.

The analysis of the spatial autocorrelation of the number of companies and sales with their locations in ArcGIS revealed that both the number of firms and sales have a high positive spatial autocorrelation with geographical location, although there are some differences in variation. Figures 3 shows the spatial autocorrelation values for the number and sales of firms with geographical location in the Korean cultural industry. Combining Figure 1 and Table 1, it can be found that the aggregation phenomenon of the number of enterprises is basically consistent

Table 2. Change rate within 5,10 and 15 years of the sales of companies(Based on the situation in 2020)

Region	5Y	10Y	15Y
Seoul	16.54%	73.28%	374.45%
Busan	-11.23%	46.50%	142.25%
Daegu	-5.83%	49.23%	209.96%
Incheon	10.56%	62.72%	335.83%
Gwangju	2.68%	47.72%	199.85%
Daejeon	10.49%	45.27%	297.75%
Ulsan	-1.83%	50.74%	219.12%
Sejong-si	5.11%	-	-
Gyeonggi-do	57.17%	139.35%	666.03%
Gangwon-do	-2.10%	46.76%	254.73%
Chungcheongbuk-do	-0.29%	78.67%	288.48%
Chungcheongnam-do	2.90%	72.77%	462.21%
Jeollabuk-do	2.55%	49.92%	241.67%
Jeollanam-do	25.68%	57.42%	309.37%
Gyeongsangbuk-do	1.49%	44.54%	172.76%
Gyeongsangnam-do	5.41%	90.13%	275.20%
Jeju-do	-67.77%	-3.16%	100.43%
Sum	21.78%	83.73%	398.41%

Source: KOSIS, 2010, KOSISc, 2021

with the population density distribution. Although trends are inconsistency, the concentration of population in a region inevitably leads to advantages in terms of capital, labour and logistics, so forming clusters is easier than in areas with low

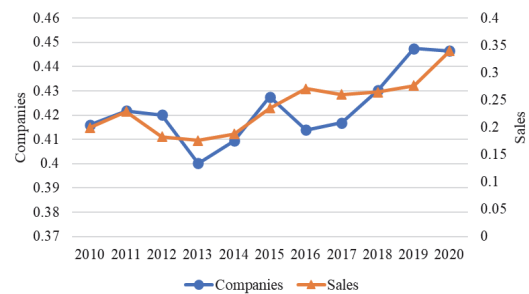


Figure 3. Spatial Autocorrelation of the Sales and the Number of Companies

Source: KOSISb, 2021

population density. In the past five years, the number of Korean cultural industry firms has gradually declined, but sales have gradually increased. This shows that the industry has not lost its vitality in the process of continuous integration. While expanding the market scale, it has exerted itself by gathering in densely populated areas. The advantage is to enrich the scale of the domestic market to support better exports of the industry. That is also consistent with the export policy of cultural industry that the Korean government has adhered to for more than 20 years.

As shown in Figure 4, Southeast Asia, Greater China and Japan are always the mainly export destinations of the Korean cultural industry, while North America and Europe are the regions where the Korean cultural industry is trying to expand. From 2009 to 2014, Japan was the traditionally first export destination for the Korean cultural industry, but with the rapid economic development of Greater China (especially China mainland) and the increasing demand for various products, Greater China has replaced Japan as the main export destination since 2016.

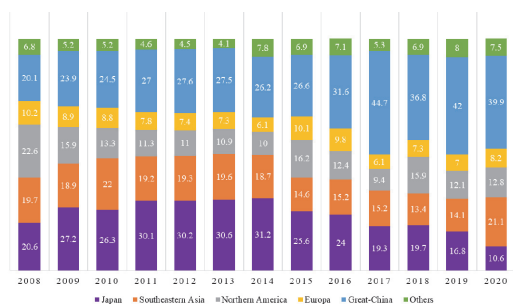


Figure 4. Share of Korean Cultural Industries in Exports by Destination Country
Source: KOSISA, 2021 and KOSISd, 2021

In addition, after the "THAAD" incident between China and South Korea, companies in the Korean cultural industry realized the possible consequences of over-reliance on the Chinese market, and actively expanded the potential Southeast Asian market. Using social media and other means to attract a large number of young people to follow and participate in the consumption of Korean cultural products, as shown in Figure 4. In recent years, especially after the COVID-19, the Korean cultural industry as a whole has received unprecedented attention in North America and Europe, and the Korean cultural industry as a whole is confident of increasing its exports to North America and Europe in the future.

Moreover, the growing popularity of Korean cultural exports and the attention generated by the Internet will also have a positive impact on other cultural industry sectors and even other industries. For example, when viewer shows interest in Hallyu contents through watching of drama series or music videos, it may lead to the desire of visiting Korea(see Figure 5). During tourism it could contribute positively to the sectors of transportation, food and beverage,

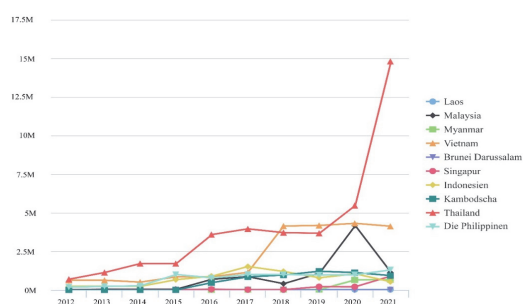


Figure 5. Growth in the Number of Fans of the Korean Wave in Southeast Asia
Source: Korea Foundation, 2022

retail, etc. (Oh, 2018; Lee and Kim, 2014). Such diverse experiences and improvements play an important role in collaboration between different sectors and attracting customers.

5. Case studies of the Korean Cultural Industry

1) Film and Television Industry

“Squid Game” is one of the successful joint projects launched by Netflix and Korean cultural industry firms in 2021. Compared with the previous model of Korean TV series dominated by broadcasters, Netflix-invested projects have higher budgets and fewer creative restrictions. It has an overwhelming advantage in shooting high-cost explosion shots that are easy to excite the audience, which is one of the reasons why Squid Game can attract global audiences. Since Netflix entered the Korean market late, it has to fully rely on the established and systematic film network in South Korea. Therefore, Netflix often uses commissions or co-productions with existing film and television production companies. Netflix plays the role in such models, which take charge in financing, marketing and international distribution, while local production companies are responsible for script selection, staff recruitment, actor recruitment, and coordination of filming locations.

Once the project is in place, the shooting phase begins, in which other actors (suppliers) are involved: the actors agency coordinates the

actors, the film company creates the shooting schedule. The costume, props and make-up companies provide more detailed work, and some special effects –companies are also involved in this stage. After the filming is completed, it enters the post-production stage. A professional film and television editing company, a sound effects company, and a special effects company will further improve the post-production work. At the same time, a professional music production company will be responsible for the soundtrack of the work. Afterwards, before the finished work is released to the public, Netflix will be responsible for the marketing road show, and entrust local companies to translate and production according to different languages. After completing the content distribution, if the response of the

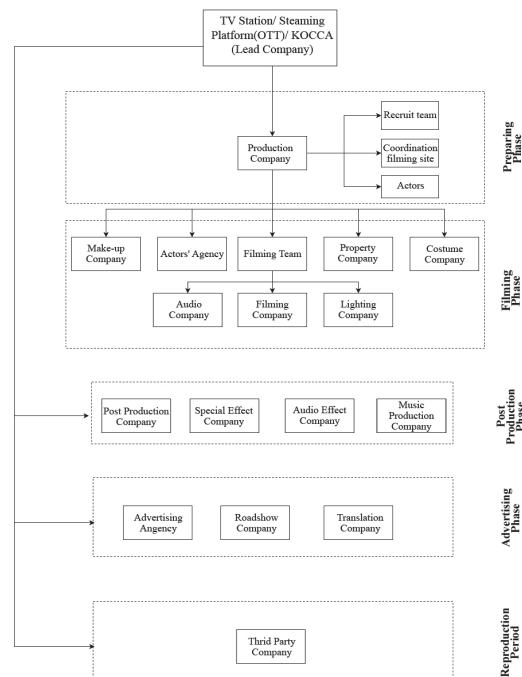


Figure 6. Developing Model of Film and Television Industry

work is good, there will also be IP authorization for third-party companies (see Figure 6).

The general production model is to replace Netflix's role with that of a broadcaster or other streaming platform as the lead company. If the lead company is not large enough or does not have sufficient funding to fully support the project, the Korea Creative Content Agency will provide financing and technical support for the project. Although there might be other actors in this process, the general production model is as shown below.

2) Music Industry

There are more individuals working as actors in the music industry than in the film industry. Just as a music agency acts as the lead company for an album project, it is responsible for financing the project and recruiting the production team. The artist is one of the key actors, and since Korean artists are signed to the agency, this actor can be considered part of the lead company. However, because artists have been able to have a non-mandatory relationship with the agency in recent years, they are considered here as an independent actor (see Kim and Lee, 2002). Another important actor is the music production team, which consists of a composer, a songwriter and a producer, which, depending on the situation, can be one and the same person (or a team) or three or two different people (or teams), and Some artists may also be involved in composing, writing, and arranging songs. At the end of the production phase, a recording company, a choreographing team and a post-production

company (often the music agency takes on this role) are available to refine the details of the work. After completing the entire post-production phase, the music agency integrates the streaming platforms, the printing company, the distribution company, the DM production companies and other actors into its network. After that, as with the film and television productions in chapter 5.1, the music agency is also responsible for marketing, and here most companies turn to advertising agencies that do some of the work on their behalf, especially since K-Pop is in the last five has gained global attention over the years and some of the new groups are receiving more and more views and audiovisual contributions on streaming platforms (particularly YouTube), which are also directly related with the weekly competition of music television programs. To ensure their success, the agencies will sign an advertising agreement with the streaming media platform to obtain a certain amount of viewers (see Figure 7). At the same time, if the international

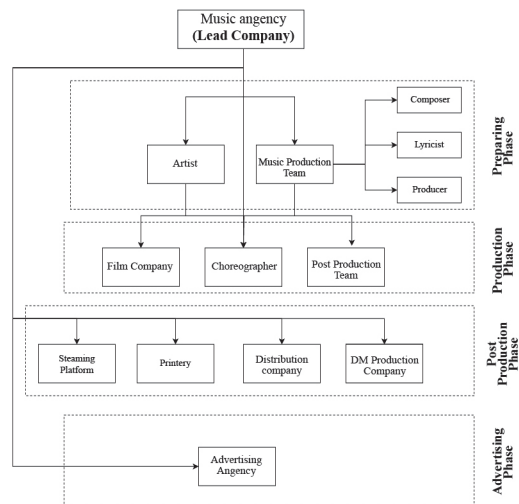


Figure 7. Developing Model of Music Industry

response is good, the probability of attracting overseas investment (mainly public listed companies) will increase accordingly. In addition, the increase in international popularity will attract more international cooperation with famous producers, composers, artists, etc. It also means that, those fame will also further expand the production network overseas.

Based on the examples and analyzing the development of the Korean cultural industry in the domestic and international markets, the development scheme of the Korean cultural industry in the global production network can be summarized in Figure 8. This scheme is divided into four phases: the domestic development phase, the export phase, the outsourcing phase and expansion phase.

Currently, most firms in various sectors of the Korean cultural industry are in the outsourcing and expansion phases. Since the characteristics and development status of each sector of cultural industry are different, all sectors may not be at the same phase of this development model. However, according to South Korea's "FRAMEWORK ACT ON THE PROMOTION OF CULTURAL INDUSTRIES" and "CONTENT INDUSTRY PROMOTION

ACT(CIPA,2022)", the common goal of the development direction of the cultural industry setting out in the act is to promote the development of the cultural industry and enable the cultural industry to enter overseas markets through international exchanges and international cooperation. Therefore, this model is common to all sectors, but the development phase and domestic market status determine which phase it is at now.

6. Conclusion

It is difficult for the cultural industry to gradually expand its existing production networks and include actors outside its own country, not only because of its own characteristics, but also because the production of the entire industry relies mostly on the output of human thinking. Changes in the cultural environment are bound to deviate from the original planning intentions, which naturally leads to narrowing the audience for the products. Based on the examples, it is clear that at the present time Korean cultural

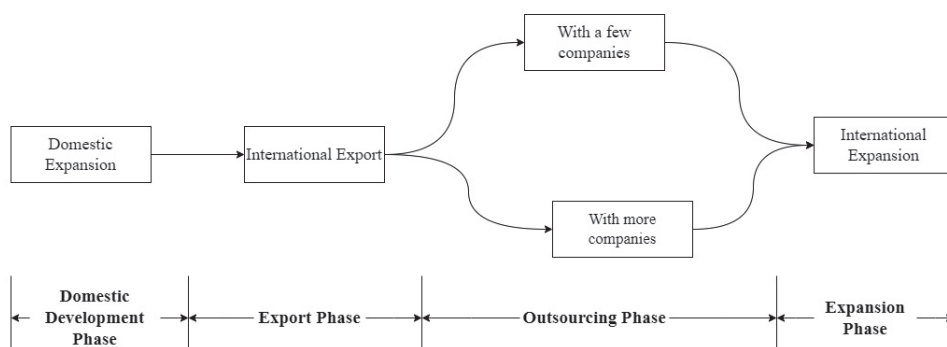


Figure 8. Developing Phase of Korean Cultural Industry

industry companies are still seeking to outsource parts of their production network to actors overseas, but the main purpose of such transfer is currently not to reduce costs, but to increase the added value of the products through the attention and synergy that the transfer brings. Such a development direction is also consistent with Coe and Yeung's expression of the territoriality of global production networks, that "Value activities in global production networks can also be highly localized, with key inputs and/or expertise rooted in specific locations(Coe & Yeung, 2015). This localization of global production networks is particularly noticeable in the early stages of the production of goods and/or services".

At the same time, it should be noted that the characteristics of original country of cultural industry products are stronger than those of light and heavy industrial products, because their initial audience is only consumers in their own country rather than consumers around the world. The cultural differences in the products may become their important obstacles to sales network expansion(Yoon & Malecki, 2010). However, the current trend is that the Korean cultural industry, especially the music industry, has become very attractive to young people through its marketing strategy via the Internet, with Western audiences' curiosity about Eastern culture also playing an important role. This rapid increase is certainly a shock to the cultural industry, which is largely dominated by Western countries. If the cultural industry as such developing trend, it could become one of the world's most popular cultural styles, which would increase the overall competitiveness of the

national brand(Jang & Song, 2017). Since it is also not possible to produce on an OEM model, as is the case in many highly globalized industries, ODM and OBM models are preferable and some companies have already begun such attempts to gradually expand the local market by using the development model from Korea through localization operations(NiziU, 2022; & Team, 2022).

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