

The Hallyu policies of the Korean government*

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Abstract

The purpose of this study is to analyze the Korean government's Hallyu policies by period to identify how each administration's policies have affected the spread and development of the Korean Wave. To this end, this study analyzed the main contents of the Korean government's Hallyu policies over the thirty-year period from the Kim Young-sam administration to the Yoon Seok-yeol administration, based on the primary and secondary sources. The Kim Young-sam administration first implemented a system for promoting the cultural industry while the Kim Dae-jung administration laid the legal and institutional basis for cultivating the cultural industry and implemented the Hallyu policies through exporting Korean Wave contents. The Roh Moo-hyun administration reorganized the administrative bodies related to the cultural industry and strengthened their functions. The Lee Myung-bak administration implemented development-oriented policies focusing on selective contents products with high potentials for growth. The Park Geun-hye administration established private advisory bodies, such as the Hallyu 3.0 Committee, and the Moon Jae-in administration actively pursued the New Southern Policy and the policies for promoting the New Hallyu to facilitate the sustainable development of the Korean Wave. The Yun Seok-yeol administration plans to expand Korea's global influence by nurturing K-contents and build a solid media and content industry. Over the thirty years, the Korean government has channeled significant nation-level efforts to foster the cultural industry by implementing suitable policies at the right times, spearheaded the sustainable development of the Korean Wave.

Keywords: Korean government, Hallyu policy, Cultural industry, Development of the Korean Wave

1. Introduction

In the recent years, we have witnessed the whole world going in a craze for Korean cultural contents, referred to as K-contents. With Korean pop (K-pop) singers, such as BTS and Black Pink, and K-contents, such as *The Squid Game*, *Hellbound*, and *All of Us Are Dead*, becoming global hits, the Korean Wave or Hallyu has been gaining even greater influence in the global market. Hallyu or Korean Wave refers to the global popularity of Korean culture, such as K-Pop and TV dramas. The term Hallyu was first used in the early 90s after Korean entertainment culture gained great popularity in China. In the beginning, Hallyu is used in relation to numerous Korean cultural practices, mainly including TV dramas, K-Pop, and movie stars. But Hallyu is increasingly expanded to include not only K-Pop and TV dramas but also Korean lifestyle such as food, cosmetics, fashion and so on (Kim, 2007, p.47).

The Korean Wave we see today is called the ‘New Hallyu’ for opening a new chapter of the Korea’s global cultural influence. In this context, this study begins with the question, “Why should we pay attention to the Korean Wave?”

From one of the poorest countries in the world after Japan’s colonial occupation and the Korean War, Korea achieved rapid economic growth and became largest economies in Asia and the world. Korea’s rapid economic growth is dubbed the ‘Miracle on the Han River’ and has long been a role model for economic development for developing countries. Now, the Korean Wave is called the ‘Second Miracle on the Han River’ for making something that was once unimaginable and people on the other side of the world are going head over heels about BTS, studying Korean, and watching Korean dramas. From embracing and admiring the cultures of the United States and Japan, Korea now exports its culture to the world and attracting attention of global citizens.

Korea’s cultural contents industry has become the country’s key engine for economic growth. The economic value and market size of the Korean Wave have increased every year, and the growing recognition of and preference for Korean products in the global market through Hallyu stars and contents have enlarged the sales volume of Korean products. It is for this reason that the Korean Wave has been considered as an important policy agenda for Korea’s national economy.

The Korean Wave has been playing a decisive role in building Korea’s soft power and enhancing the country’s image and brand power in the international community. Since Korea faces limitations in stockpiling hard power, it is not surprising that using Hallyu to maximize the country’s soft power has become a critical policy task for increasing the country’s power and influence in the world. Joseph S. Nye first introduced the concept of Soft Power, which is the opposite concept of Hard Power such as military power and it is the power to attract people through charm to induce

consent and cooperation. The Soft Power is composed of its culture, political value, and foreign policy (Nye, 1990). Korean Wave has played a crucial role in increasing the power of Korean culture, and that is Korea's Soft Power. From a destitute country that had received aid just half a century ago and a country in the peripheries, Korea is now standing at the center of the global cultural market, becoming a role model again for developing countries.

The factors behind the Korean Wave's success can be roughly divided into the competitiveness of individual K-contents, the role played by entertainment companies in the advancing of K-pop into the global market, the development of information technology (IT) and digital social networks, and the Korean government's strategic policies. Some view the Korean Wave is an 'undesigned success,' rather than a success achieved through government-led strategies, as was the case of Korea's economic growth. When the Korean TV series *The Squid Game* was released on Netflix in September 2021 and became Netflix's number one most viewed contents in 94 countries, there were diverse opinions about the factor behind this success. Some attributed it to Netflix's bold investment strategy, while others highlighted *The Squid Game's* storytelling, such as the incorporation of Korea's traditional play culture, the Korean sentimentality, and realistic and relatable storyline, or the good balance between globalization and localization. While the success of the Korean Wave cannot be pinpointed to just one factor, this study pays attention to the role played by government policies, which has received relatively little attention compared to other factors.

The purpose of this study is to analyze the Hallyu policies of the Korean government in terms of how they influenced the development of the Korean Wave over time. There have been many attempts to explain the Korean Wave's success, but many existing studies have argued the changes in the media environment as the main factor or analyzed the success of individual genres, such as K-pop, rather than looking at the Korean Wave as a whole. According to Cho and Sim (2013), Choi and Park (2015), and Jang (2019), prior to the late 2000s, the Korean Wave mainly depended on local distribution networks for delivering K-contents, but the spread of the New Hallyu was based on social network services, such as YouTube, iTunes, Facebook, and Twitter, which enabled the worldwide distribution of K-contents and enabled the Korean Wave to spread further and wider. On the other hand, Jeong (2013) and Noh (2012) argued that the Korean Wave's success in overseas markets was due to the high quality of K-contents, which was supported by entertainment companies that held global auditions to discover new talents and tailored the cultural contents they produced to the global market.

Meanwhile, Kim (2007) summarized the success factors of the Korean Wave into three. First, the Korean Wave was the outcome of Korea's economic strength, which enabled the country to achieve economic success and create high-quality cultural products based on its achievement of rapid industrialization in the late 20th century. Second is the quality of Korean

Wave content, particularly the image of a “Dynamic Korea” that was created by the Korean-style development model of realizing economic development under an authoritarian government then transitioning to democracy. According to Kim, the idea of Korea as a country that achieved economic development as well as democratization and has a thriving civil society lying underneath the contents of Korean movies and TV dramas is a source of attraction. At the same time, cultural contents that feature Korea’s unique cultural values, such as *A Jewel in the Palace (Dae Jang Geum)*, was met with popular reception. Lastly, there are also claims that the Korean Wave contents are products based on American culture, added with a Korean touch, and its success was achieved by chance by targeting a niche market.

To summarize, previous studies have found the reasons for the Korean Wave’s success in the rapid changes in the IT environment and the resultant spread of digital technology and Internet and mobile communication, and the high quality of the music, artists, and contents created by innovative entertainment companies, such as SM, YG, and JYP.

This study examines the Korean government’s Hallyu policies, an area that has been relatively neglected in Hallyu research, as a success factor of the Korean Wave and hypothesizes that the government’s active intervention and leadership were indispensable the success of the Korean Wave, just as they had been for Korea’s economic development. The Korean Wave’s success was not accidental – it was founded upon the Korean government’s strategic policies and roles. The spread of the Korean Wave did not only bring positive effects but also caused an opposing ‘anti-Korean Wave’ all over the world. Furthermore, various political, economic, and social interests are intertwined in cultural exchanges between countries. For example, China enforced a government ban on the Korean Wave after the deployment of THAAD on the Korean Peninsula in 2016, and an anti-Korean Wave movement occurred in China. Government policies seek to find the best path to maneuver through such difficult diplomatic situations and propose a solution. In other words, while the quality of Korean Wave contents and the efforts of individual companies were important, the government’s policies were also critical in maintaining and continuing the spread of the Korean Wave.

The analysis of the Korean Wave’s success and the role of government policies was done empirically based on a survey of literature. Primary sources were used to examine the Korean government’s policies by period and were supplemented by secondary sources. The Korean government began to pursue cultural policies since the 1960s, but it was during the Kim Young-sam administration (February 1993-February 1998) that the cultural industry was fostered in earnest. Thus, this study sets over thirty-year period from the early 1990s up to the Moon Jae-in administration as its scope of research and concentrates on the main policies pursued by each administration during period. The Yun Seok-Yeol government did not implement specific Hallyu policies because it was a new government, but this study will deal with the big picture of the Hallyu policies that the Yun Seok-Yeol government intends to lead in the future.

2. Korea's Hallyu Policies

2.1 Kim Young-sam Administration (February 1993-February 1998)

The Kim Young-sam administration that took office in 1993 placed strong emphasis on 'cultural industry' and 'cultural welfare'. In July 1993, the government announced the "Five-Year Plan for the Promotion of New Korean Culture" and suggested five policy pillars and laid out specific policy tasks. The fourth policy task, "Supporting the development of the cultural industry and the revitalization of corporate culture," provides a glimpse into the early stages of the Korean government's Hallyu policies (KOFICE, 2018, pp.106-107). Since it was first necessary was to form a specialized body within the government to establish and implement Hallyu policies, the Cultural Industry Bureau in charge of Hallyu policies was created within the Ministry of Culture and Sports as a part of the government's efforts to foster high value-adding industries, especially in terms of the industrial and economic potential of culture and the arts.

With the establishment of the Culture Industry Bureau, various policies were implemented to support and promote domestic cultural contents, such as publications, movies, games, and music. Also, in the Culture Vision 2000 announced in 1997, the government included "cultivating the cultural industry and culturalizing industries" and "globalizing Korean culture" as a part of the visions for the country's future. However, the evaluations of the Kim Young-sam administration's cultural policies tend to view that, while the policies recognized the necessity and importance of developing the cultural industry, they did not lead to the execution of specific plans (Kim, 2009, pp.77-78).

The Kim Young-sam administration's policies for supporting the promotion of exports related to the Korean Wave were limited to the participation in and support for overseas exhibition markets and expositions. As the Korean cultural industry was not yet equipped with global competitiveness, the most urgent task at the time was to make Korean contents known in the global market. Some examples of the activities done in this area were setting up exhibition booths in events run by overseas broadcasting programs, such as MIP-TV, MIP-CON, and Shanghai International Television Festival, the setting up and operating the Korean Pavilion at the International Book Fair in 1995; and running the very first Korean Pavilion at the MIDEM ASIA97 Music Expo held in Hong Kong in 1997. Also, the Busan International Film Festival was launched in September 1996, which continues to contribute in raising the international status of Korean films. In the field of animation, the Seoul International Cartoon and Animation Festival was held in August 1995, and in the field of games, the first international video games trade show called the Korea International Video Game Hardware and Software Exhibition (Amuse World) was held in 1995. Amuse World changed its name to KAMEX games trade show since the 2000s, and in 2005, the name was changed again to G-Star and ushered in an era of online games.

Efforts to make Korea known abroad through broadcasting began in earnest when the Korea International Broadcasting Foundation was established in 1996, followed up by the launch of Arirang TV in 1999. The Korea International Broadcasting Foundation mainly conducted international exchanges and cooperation in relation to broadcasting, with more focus on publicizing Korea overseas than promoting mutual exchange.

2.2 Kim Dae-jung Administration (February 1998-February 2003)

It was during the Kim Dae-jung administration that the term “Korean Wave” began to be used in earnest. Called a “Culture President,” President Kim Dae-jung sought to abolish the censorship of culture and arts and guarantee the freedom of creative expression, separate and expand the Ministry of Culture as an independent government agency and secure 1% of the national budget for the Ministry of Culture, and designate the cultural industry as Korea’s core industry. When the Korean TV drama *What Is Love*, which was broadcasted on China’s CCTV in 1997, became extremely popular in China, the export of broadcasting contents that were realized by individual business efforts was set as an area for government policy support from 1998. In December 1998, the Korea International Broadcasting Foundation’s Video Contents Export Support Center carried out a project to support the post-production separation of music and effect (M&E) in Korean broadcasting contents to facilitate dubbing and captioning by broadcasters in foreign countries. This project handled around 1,500 TV programs in 2002 alone. Support was also provided for producing foreign language versions of Korean animation programs. To facilitate Korean music’s overseas expansion, foreign language versions of Korean songs were produced and distributed, and FM radio programs specializing in Korean music were created and broadcasted in 11 cities in China. These government policies can be seen as projects carried out for the purpose of developing markets and promoting Korean culture rather than to secure economic profits (Kim et al., 2017, pp.28-29).

As the exports of certain Korean contents genres increased, government policies gradually began to focus on reaping economic effects through exports. The Five-Year Plan for Promoting the Cultural Industry containing Hallyu policies was announced in February 2000. To foster the cultural industry as a national basic industry, more than 1% of the government budget was allocated to the cultural sector. In 1999, the Framework Act on the Promotion of Cultural Industries was enacted to increase the budget of the Cultural Industry Bureau by 6 times from 16.8 billion won in 1998 (Kim, 2009, p.99). Furthermore, as part of the government’s support for fostering the cultural industry, the Korea Game Industry Development Institute and the Animation Academy were established in 1999, as well as the Game Academy in 2000, and the Korea Cultural Contents Promotion Agency in 2001. The Korea Cultural Contents Promotion Agency was put in charge of providing comprehensive support for the cultural content industry, such as developing high-quality contents in the fields of animation, music, cartoon characters, comic books, and video games, as well as promoting the development of applied

technology, providing marketing support, developing policies, and training human resources. The budget for fostering the cultural industry was further increased to exceed 1 trillion won in 2001, demonstrating the heightened status and importance of the cultural industry and cultural policies in Korea (Kim, 2021, p.210).

On August 30, 2001, the government announced the “Support Measures for Cultivating the Hallyu Industry,” which included expansion for strengthening the international competitiveness of Korean popular culture; the establishment and operation of the Asian Council for Cultural Contents Exchange for encouraging the development and promotion of high-quality popular culture contents with the participation of related industries; the establishment of Hallyu experience halls in Beijing and Shanghai, etc. and overseas offices of the Korea Cultural Contents Promotion Agency; the creation of a Korean Wave mecca where popular music, games, characters, and fashion can be exhibited and experienced in tourist-dense areas, such as Dongdaemun Stadium, in Seoul; and the hosting of bilateral and multilateral cultural events, such as Korea-China youth music festivals (Ministry of Culture and Tourism, 2001).

In sum, the Hallyu policies from the 1990s to the early 2000s mainly focused on supporting the localization of Korean cultural contents, such as facilitating the participation of Korean companies in overseas exhibition markets and expositions, hosting international cultural exchange events, and partially supporting the post-production work on existing Korean contents. During the Kim Dae-jung administration, policies were prepared to create economic effects through the exports of cultural contents, and government bodies and institutions were established, which were given increasingly larger budgets, to support the cultural contents industry. The establishment of necessary domestic infrastructure for cultural contents during this period laid the foundation for implementing Hallyu policies in the years to come.

2.3 Roh Moo-hyun Administration (February 2003-February 2008)

The wider expansion of Korean cultural contents into overseas markets led the government to view the cultural contents industry as a key driver of the Korean economy, and from 2002, specific measures to support the cultural contents industry were implemented. The cultural industry was chosen as one of the top 10 strategic industries for the future of Korea, and the “Policy Vision for the Cultural Industry to Become a Cultural Powerhouse” was announced in 2003, which set the Korean Wave as a core policy agenda. Major policy tasks included cultivating creative professionals and developing technologies, expanding the foundation for content creation, expanding investment and improving the environment for distributing cultural contents, establishing regional bases for the cultural industry, expanding the entry into overseas markets and international cooperation, and establishing laws and institutional systems to support the cultural industry. In pursuing these policies, the Roh administration emphasized the establishment of a cooperative network among the government, various related organizations, the private sector, and the academia as shown in Figure 1.

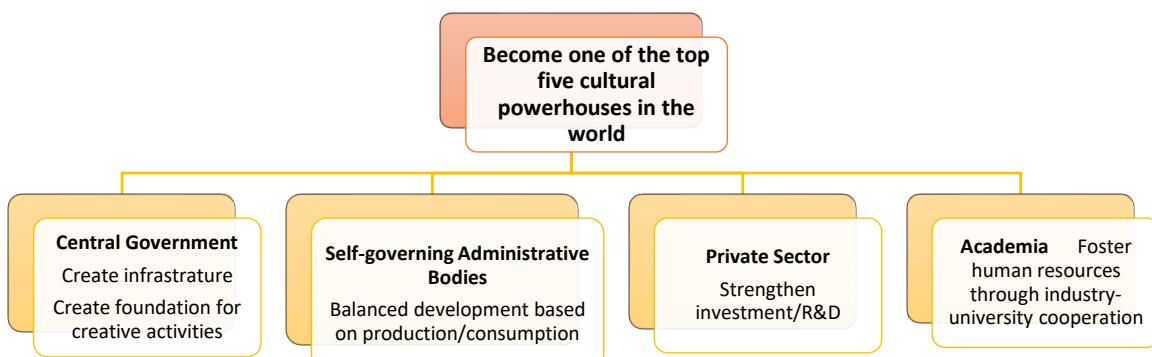


Figure 1 The cooperative network laid out by the “Policy Vision for the Cultural Industry to Become a Cultural Powerhouse”

Source: Ministry of Culture and Tourism (2003), “Policy Vision for the Cultural Industry to Become a Cultural Powerhouse.”

Based on the Asian Council for Cultural Contents Exchange established during the Kim Dae-jung administration, the Korea Foundation For Asian Culture Exchange (now the Korean Foundation for International Cultural Exchange, KOFICE)’ was established on June 4, 2003. The Korea Foundation For Asian Culture Exchange carried out tasks such as publicizing information related to the Korean Wave and supporting for the entry into overseas markets by companies in the cultural industry. In the mid-2000s, however, the sluggish growth of cultural contents exports, especially TV programs and movies that were the major Korean Wave contents at the time, caused concerns about the strengthen of the Korean Wave. In response, the Roh administration established an advisory committee on Hallyu policies centered on the Korea Foundation For Asian Culture Exchange to identify the status and problems of the Korean Wave and to establish appropriate countermeasures at the national level. The committee was composed of 25 members who were key figures or experts in not only the various areas of the cultural industry, such as television, film, broadcasting, and music, but also in the academic, economic, legal, and media circles. The heads of six agencies and organizations related to cultural contents, such as the Korea Cultural Content Promotion Agency, were also included as members.

In the latter half of the Roh administration’s term, the existing policies to support the export of Korean Wave contents, which were centered on exports to Japan and China, were supplemented by dividing the overseas expansion of the Korean Wave into three stages and pursuing differentiated and customized policies by stage and region. <Table 1> summarizes the supplementation of the policies on the export of Korean Wave contents in the “2006 Main Policy Tasks.”

Table 1 Strategies to promote the overseas expansion of the Korean Wave by stage

Stage	Region	Strategy	Specific tasks
Vertical expansion (deeper influence within the market)	Japan, China, Vietnam, Hong Kong, etc.	Support the continuous supply of follow-up contents, reduce anti-Korean wave sentiments, and maximize economic effect → Induce favorable sentiments about Korea	Expand two-way exchanges, Protect copyright, conduct investigations on illegal piracy, etc.
Horizontal expansion (wider spread within the market)	Taiwan, Thailand, Malaysia, Indonesia, etc.	Expand the Korean Wave boom by actively supporting the entry into market by the private sector, promote proper understanding of Korean culture → Induce purchase of Korean products	Hold Hallyu star events, Provide support for news coverage on the Korean Wave, etc.
Potential for entry	Latin America, Middle East, Central Asia, Russia, etc.	Actively create a foundation for creating a Korean Wave boom by distributing Korean cultural contents to markets that private companies are hesitant to enter due to low marketability, etc. → Induce a boom of Korean popular culture	Support the entry of Korean contents into the market, focusing on movies and TV dramas that have higher popular receptivity

Source: Seon (2006)

Since 2003, the KOCCA has been operating the Culture Content Export Information System (CEIS) system to support the overseas expansion of Korean cultural contents and has opened overseas offices in Japan, China, Europe, and the U.S. The Korea Game Industry Promotion Agency also strengthened its research activities and local support by opening offices in Beijing and Shanghai, China. These overseas offices regularly provided reports on overseas content market and export trends. Also, the offices provided local support for publicizing Korean cultural contents and consultations for Korean companies that wish to advance into the local market and facilitated business meetings with local buyers. This kind of overseas infrastructure for contents exports, in addition to the infrastructure available in Korea, led to the qualitative development of the policies related to exporting cultural contents.

The Cultural Powerhouse (C-Korea) 2010 strategies for fostering cultural contents announced in July 2005 included plans for the intensive cultivation of not only video games,

movies, and music, which were the core cultural contents, but also the broadcasting industry. In 2006, laws on the promotion of specific genres of contents (such as music, broadcasting programs, video games, and movies) were enacted, and governmental efforts to deal with copyright infringements were put in motion in response to the concerns raised about damages caused by illegal copying to the profitability of cultural contents and the rising need for cooperation between countries for copyright protection. For example, a copyright center was established in China, and a separate budget was set aside for “overseas copyright protection” for the first time by the Ministry of Culture, Sports and Tourism in 2006. The government budget for overseas marketing and export revitalization was also created and implemented in earnest. In 2005, the government supported Korean TV drama showcases held overseas and purchased overseas distribution rights for Korean TV dramas from broadcasters to distribute the contents for free to the Middle East and Africa, where the Korean Wave was less popular.

The Roh administration’s term can be summarized as a period of wider global spread of Korean Wave and stronger governmental responses to the crises emerging in the process of the Korean Wave’s overseas expansion. It was also the period when government policies took clear export-oriented directions. The policies that were pursued built the framework for supporting all areas of cultural contents exports from strengthening research activities for building necessary infrastructure overseas, supporting overseas marketing, and protecting copyrights to gain higher profits through the Korean Wave. When the anti-Korean wave arose in certain countries, the government established the Korea Foundation For Asian Culture Exchange to promote two-way cultural exchanges with other countries as well as an advisory committee on Hallyu policies to prepare the governmental response against the anti-Korean wave phenomenon. In November 2004, the Korea Foundation For Asian Culture Exchange started full-scale exchange and cooperation activities by holding the first Asian Song Festival inviting top singers from Asian countries to perform together. In addition to cultural exchange activities, the Foundation also expanded its scope of activities to academic exchanges and research, such as holding Korean Wave forums and publishing a series of papers on the Korean Wave, and started a project for promoting two-way exchange of cultural contents by purchasing TV programs from various countries and broadcasting them on domestic cable TV. Also, overseas cultural centers were transformed into larger ‘Korea Centers’ that provide one-stop services for the cultural industry and tourism.

2.4 Lee Myung-bak Administration (February 2008-February 2013)

Several Korean cultural contents gained enormous global popularity during the Lee Myung-bak administration’s term, such as Wonder Girls in 2009, Psy’s “Gangnam Style” by in 2012, and TV dramas *My Love from the Star* and *Descendants of the Sun*. Accordingly, Hallyu

policies became recognized as the main policies that drive the development of the cultural industry, rather than just being a part of cultural policies.

The Lee administration's Hallyu policies were geared at the nation-led cultivation of the cultural contents industry from the view that the contents industry is the industry that will raise Korea's per capita gross national income (GNI) to \$30,000. Under the goal of "becoming a content powerhouse leading the creative economy," the Ministry of Culture, Sports and Tourism established a Cultural Contents Industry Promotion Committee under the Prime Minister's office, which brought together eleven ministries, including the Ministry of Economy and Finance, and announced the "First Basic Plan for Promoting the Cultural Contents Industry (2011- 2013)." The main goals set out in this plan were to "increase investments by the government and the private sector, including large corporations and financial institutions, to expand the funds for the cultural contents industry, and create new markets through government-wide support for uncovering and commercializing next-generation convergence contents, and identifying competitive contents through the Global Contents Fund and support for joint productions," thereby realizing nation-led cultivation of the cultural contents industry.

The Lee administration increased the financial support for globalizing the cultural industry by implementing policies aimed at strengthening the role of fund of funds, providing funds and building infrastructure to support joint productions with other countries and promote investment, and investing in specialized investment cooperatives from 2009. In 2011, the Global Contents Fund was created, and the first round of the fund raised a total of 123.6 billion won (40 billion won from the government, 83.6 billion won for the private sector and foreign investors), and in 2015, the second round raised 100 billion won (40 billion won from the government, and 60 billion won from private investors).

In 2009, five organizations related to the cultural contents industry (Korea Cultural Contents Promotion Agency, the Korea Broadcasting and Video Industry Promotion Agency, the Korea Game Industry Promotion Agency, the Cultural Contents Center, and Korea Software Promotion Agency) were integrated as the Korea Creative Content Agency (KOCCA). Large-scale events and large short-term projects are hosted, organized, and sponsored by affiliated organizations of the Ministry of Culture, Sports and Tourism, including the Korea Tourism Organization, Visit Korea Committee, Presidential Council on National Branding, Korea Foundation for Cultural Industry and Exchange, KOCCA, Korean Culture and Information Service, and Korea Communications Commission. The Visit Korea Committee not only planned and hosted the SM Town Paris Concert, but also events such as the Gyeongju Hallyu Dream Festival, Hallyu Dream Concerts, and the K-Pop Cover Dance Festival. What should be noted here is that these events were not simply held by local governments; the administrative bodies of

the central government strategically intervened and sponsored these events as national projects (Choi, 2014, p.150).

The Korea Foundation for Cultural Industry and Exchange (KOFICE, formerly the Korea Foundation For Asian Culture Exchange) has gradually expanded the scope of cultural exchanges beyond East Asia. Starting with the 2009 Pattaya International Music Festival, the Foundation held the Korea-Mongolia Culture Festival Hanmadang Big Concert, Korea-Thailand Friendship Concert, and Korea-Vietnam Friendship Concert. The Hallyu forums held by the Foundation were attended by people from the cultural industries of Korea, Mexico, and Taiwan, and in 2010, the Foundation supported the journalists in the Middle East region and South Africa to write up reports on the cultural industry. In this way, the Foundation expanded its reach beyond Asia to emerging markets. Meanwhile, projects to increase the visibility of Korea by providing high-quality Korean broadcasting contents to the Central and South Americas, the Middle East, and Africa, where the private sector was still hesitant to enter due to low marketability, continued to be carried out.

Since the Kim Young-sam administration, the Korean government continued to bolster the cultural industry by implementing relevant laws, institutions, and policies. The Lee administration did the same, but the Lee administration's policies were excessively concentrated on fostering the cultural contents industry, especially on contents related to the Korean Wave, resulting in the exclusion of non-mainstream culture and arts (Choi, 2013, p.257). In sum, it can be said that the Lee administration strategically nurtured specific industries through a growth-oriented policy model concentrating on expanding investments made by the government, large businesses, and financial institutions.

2.5 Park Geun-hye Administration (February 2013-February 2017)

The Park Geun-hye administration launched the Hallyu 3.0 Committee, a private advisory body for ushering in the era of Hallyu 3.0, in March 2014 and the Hallyu Content Planning Taskforce on June 19, 2015 with the goal to establish a cooperative system with other agencies and the private sector and strengthen the link between the Korean Wave and other industries for the diversification of Korean contents (beyond TV dramas and K-pop) in the global spread of the Korean Wave and of the recipient countries of the Korean Wave. The organizational structure of the Hallyu Content Planning Taskforce is shown in Figure 2.

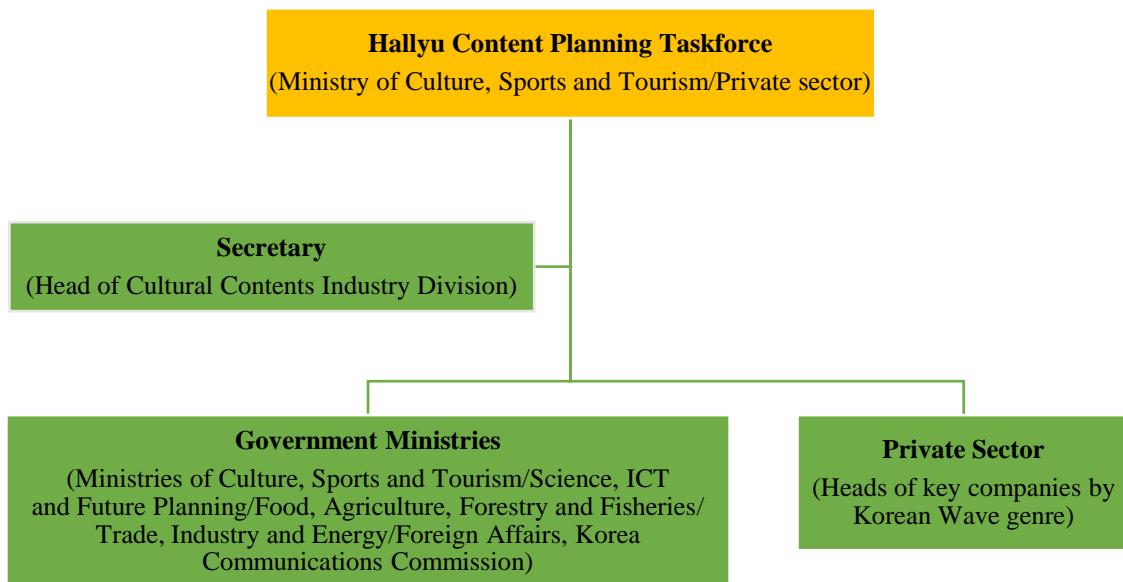


Figure 2 The organization structure of the Hallyu Content Planning Taskforce

Source: Ministry of Culture, Sports and Tourism (2015)

The KOFICE's function of responding to anti-Korean Wave sentiments and expanding exchanges with overseas cultural industries were strengthened, making it the central institution in charge of analyzing ways to realize the 'sustainable development of the Korean Wave' as well as the latest issues, trends, and flow of the Korean Wave, functions have been further. The Foundation's major tasks included conducting research, building networks with overseas cultural industries, and running projects to facilitate cultural exchange and support overseas correspondents. The main projects run by the KOFICE are summarized in Table 2.

Table 2 Main projects of the Korea Foundation for Cultural Exchange (KOFICE)

Research projects	Network-building projects	Cultural exchange projects
Market research on cultural industry trends	Hallyu forums and seminars	International cultural exchange events
Reports on trends in the Korean Wave, publication of research papers		Building a basis for cultural contents development domestically and abroad
Development of Korea's first Hallyu index	Asia Drama Conference	Providing chances to experience Korean culture to foreign students in Korea and teens of multicultural families
Foreign correspondent recruitment and		Inviting journalists from media outlets specializing in culture

Research projects	Network-building projects	Cultural exchange projects
management		around the world
Hallyu culture information system	Hallyu Content Planning Taskforce	Support for Korean Wave communities overseas
		Exchange of broadcasting programs with other countries

Source: Korean Foundation for International Cultural Exchange (KOFICE) website

However, the policies of the Park administration were still criticized for the commercialization and one-way advancement of the Korean Wave, and at the end of 2016, the crisis faced by the Korean Wave intensified as Korea's diplomatic relations with China made a downward turn.

2.6 Moon Jae-in Administration (May 2017-May 2022)

The most noteworthy aspect of the Moon Jae-in administration's five-year plan for the administration of the state is the two-way cultural exchange and the promotion of "good action" through the Korean Wave, which aimed to increase the number of Korean Wave fans from 60 million at the time to 100 million in 2022 by expanding the cultural contents export market and related industries together.

China was the biggest market for the Korean Wave, and since the establishment of diplomatic ties with China in 1992, the two countries have engaged actively in economic, cultural, and private exchanges. The growing exports of Korean Wave contents and the increase in inbound tourists from China made China the largest consumer market for Korean culture. However, when Korea-China relations deteriorated due to the deployment of THAAD on the Korean Peninsula in 2016, China enforced a government ban on Hallyu, prohibiting Chinese people from displaying or broadcasting cultural contents produced by Korea or advertisements featuring Korean celebrities. The government ban on Hallyu was a discriminative law against Koreans, the Korean economy, and Korean culture that forced Korean entertainers from participating in commercials, movies, and Korea-China joint productions and banned the import of Korean contents. In 2017, this government ban was strengthened to censor Korean contents uploaded to internet platforms, restrict tourism to Korea, and increased customs inspections of imported Korean cosmetics and food (Kim, 2019).

This situation was major crisis for the Korean Wave-related industries due to the excessive dependence on the Chinese market. The stock prices of CJ, SM, YG, and JYP fell by more than 30% after the THAAD deployment. Korean cosmetics and duty-free shops, which were the biggest beneficiaries of Hallyu, were also affected severely; Amorepacific's operating profit decreased by 10% year-on-year in the first quarter of 2017, and the sales revenues of Lotte and Shilla duty-free shops fell by 40% year-on-year. According to the report issued by the Korea Economic Research Institute

(KERI) in 2017, the economic damage caused by China's diplomatic retaliation amounted to 8.5 trillion won, or about 0.5% of Korea's gross domestic product (GDP) (KOFICE, 2017).

To overcome this crisis, the Moon administration pursued the New Southern Policy, which turned to the New Southern region comprising a promising market of 2 billion people. The goals and tasks of the New Southern Policy announced by the government placed special emphasis on "people," and set out plans to revitalize domestic tourism by increasing the exchange of tourists, expand two-way cultural exchanges, set up scholarships for international students, expand the government invitation of industrial trainees, expand the exchange of public officials and private sector experts, provide additional support for foreign workers, and provide assistance in poverty eradication, rural development, and development cooperation in medical services. Also, under the New Southern Policy, projects were put into motion to strengthen the institutional basis for promoting trade and investment with the ASEAN countries, support the expansion of Korean SMEs into the New Southern region with the aim to expand Hallyu marketing, and promote the export of Korean consumer goods into the market through overseas home shopping channels.

The Moon government tried to improve the obstacles that hinder the global spread of the Korean Wave while simultaneously inducing a positive ripple effect. In the Policy Plan for Promoting the New Hallyu announced in 2020, the periodic characteristics of the Korean Wave were divided into four stages, where the present Korean Wave was defined as the "New Hallyu (K-Culture)."

Policy Plan for Promoting the New Hallyu set forth three strategies and nine tasks for supporting the Korean Wave, which are presented in Table 3.

Table 3 The strategies and tasks laid out by the Policy Plan for Promoting the New Hallyu

<p>Diversification of Korean cultural contents for the Korean Wave</p>	<p>Provide more intensive support for developing cultural contents that will be competitive on the world stage and support projects to uncover new Korean Wave contents from Korea's rich cultural assets</p> <ul style="list-style-type: none"> - Viewing overseas Korean restaurants as places that promote Korean culture as well, the Ministry of Culture, Sports and Tourism and the Ministry of Food, Agriculture, Forestry and Fisheries set out plans to develop Korean-style interior designs for Korean restaurants abroad - Thai and Vietnamese were designated as strategic languages in addition to major languages (i.e., English) to develop contents for promoting Korean literature and increase accessibility to Korean culture in many languages - Support the production of webtoons that converge new
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	<p>technologies, such as face recognition and virtual reality, and online video services (enhanced support for production of video contents suitable for the over-the-top (OTT) platforms)</p> <ul style="list-style-type: none"> - Establish a studio specializing in the production of realistic virtual performances so that Korean Wave fans around the world can enjoy K-pop performances non-face-to-face
<p>Hand-in-hand growth of Korean Wave-related industries</p>	<p>Establish K-beauty experience centers at major commercial areas, such as Myeong-dong and Gangnam</p> <p>Engage Hallyu stars for the overseas promotion of Korean agriculture and seafood products</p>
<p>Build a foundation for the sustainable expansion of the Korean Wave</p>	<p>Manage Korean Wave-related policies and information</p> <p>Build a favorable perception of the Korean Wave by expanding of the Korean Wave consumer base and cultural exchanges</p> <p>Establish a Korean Wave database using big data centering on the K-Culture Cooperation Committee and encourage the use of the database by joint ministries and public agencies</p>

Source: Summarized by the author based on Ministry of Culture, Sports and Tourism (2020)

First, the strategy to diversify of Korean cultural contents for the Korean Wave aimed to find new cultural contents from Korea's cultural assets outside of popular culture to further the spread of the Korean Wave. The second strategy to realize the hand-in-hand growth of Korean Wave-related industries targeted the strengthening of cooperation among related government bodies through the sharing of information on policies and joint activities to increase the economic ripple effect of the Korean Wave and realize the growth of related industries. Lastly, the government sought to build a foundation for the sustainable expansion of the Korean Wave by establishing official bodies (i.e., the K-Culture Cooperation Committee and working committees) for overseeing Hallyu policies implemented (Ministry of Culture, Sports and Tourism, 2020). To assist the implementation of these active support policies, a department in charge of supporting the Korean Wave (the Hallyu Content Cooperation Division) was launched within the Ministry of Culture, Sports and Tourism for the first time.

Regulations on the composition and operation of the K-Culture Cooperation Committee

(Ministry of Culture, Sports and Tourism Ordinance No. 407, March 3, 2020)

- ① The Committee shall be composed of no more than 25 members including one chairperson.
- ② The chairperson shall be the Minister of Culture, Sports and Tourism.
- ③ The members of the Committee shall be those who fall under any of the following

subparagraphs:

1. Vice Minister of Strategy and Finance, Vice Minister of Education, Vice Minister of Science and ICT, Vice Minister of Foreign Affairs, Vice Minister of Food, Agriculture, Forestry and Fisheries, Vice Minister of Trade, Industry and Energy, Vice Minister of Health and Welfare, Vice Minister of Oceans and Fisheries, Vice Minister of SMEs and Startups, Vice Chairperson of the Korea Communications Commission, Vice Minister of Food and Drug Safety, Director of the Cultural Heritage Administration

2. President of the Korea Creative Content Agency, President of the Korean Foundation for International Cultural Exchange, President of Korea Tourism Organization, President of the Korea Culture and Tourism Institute, Chairman of the King Sejong Institute Foundation, Chairman of the Korea Cultural Heritage Foundation, President of the Korea Trade Promotion Corporation, Chairman of the Korea SMEs and Startups Agency, Secretary General of the Korea Foundation for Cooperation of Large&Small Business, Rural Affairs, President of the Korea Health Industry Development Institute, President of the Korea Agro-Fisheries & Food Trade Corporation, President of the Korean Food Promotion Institute

④ For the efficient operation and support of the committee, one secretary shall be appointed, and the secretary shall be the head of the Content Policy Bureau of the Ministry of Culture, Sports and Tourism.

The K-Culture Cooperation Committee is responsible for setting the basic direction and strategies for Hallyu policies, overseeing and assessing policy implementation, identifying and promoting collaborative projects among related ministries and organizations, establishing a cooperation system for the spread of the Korean Wave linking with overseas offices and networks of each ministry, collecting and reflecting opinions on Hallyu policies, and discussing matters that require inter-agency cooperation for the sustainable expansion of the Korean Wave.

2.7 Yoon Seok-yeol Administration (May 2022-)

Immediately after taking office, the Yoon Seok-yeol administration announced its 120 national tasks and announced its ambition to rise beyond the advanced countries to become a world-leading nation by strengthening the influence of the Korean wave. K-content, which is receiving attention from all over the world, is nurtured as a super-gap industry. To this end, the Ministry of Culture, Sports and Tourism, the Korea Communications Commission, and the Ministry of Science and ICT will promote the establishment of a control tower for the media and content industry. By supporting policy finance, the Yoon administration will foster global content IP (intellectual property rights) companies and create a creator-centered fair environment. Also, they plan to strengthen systematic support such as nurturing talents by genre such as K-pop, games, and dramas, and help support overseas expansion of K-contents by establishing overseas advance bases (Won, 2022).

3. Conclusion

From the Kim Young-sam administration to the newly launched Yoon Seok-yeol administration, the Korean government has channeled significant nation-level efforts to foster the cultural industry and realize the globalization of Korean culture. From the early stage of the Korean Wave to the current New Hallyu stage, the government has assisted the spread of the Korean Wave through specific policies to increase exports of Korean Wave-related products and expanding cultural influence of the Korean Wave as well as responsive policies to crises such as anti-Korean wave. Hallyu policies were initially spearheaded by the Ministry of Culture (and its varied names in consecutive governments), but gradually engaged the participation of other government ministries, private sector experts, specialized institutions, private companies, and academia. The areas dealt by Hallyu policies expanded from initially concentrating on popular culture (such as broadcasting programs, music, and movies) to all aspects of Korean culture, including the cultural arts and traditional culture. The consumer markets for the Korean Wave also expanded from being centered on China and Japan to various other regions of the world, including Southeast Asia, North America, the Central, and South Americas, and Europe.

Although the Hallyu policies pursued by each administration differed in terms of their contents and goals, what they shared in common was the recognition of the cultural industry as a driver of economic growth. Based on this recognition, diverse policies reflecting the needs of the times were implemented to expand and develop the Korean Wave. As hypothesized in the introduction, the success of Korean Wave and the role of the government are closely intertwined. It can be seen that the role of the government is similar to the way Korea achieved economic growth in the 1970s. Korea's economic development plans well understood the problems of the Korean economy and suggested effective solutions. In addition, the policy contents were drafted, revised, and implemented in line with the rapidly changing global economic trend and global crisis such as oil crisis. The Economic Planning Board (EPB) of Korea, the core institution of economic development plan, was positioned above other economic ministries and had the power to reconcile conflicting interests and implement the plan well. Besides, the strong will and support of the government made each institution to cooperate and operate efficiently. Korean economic bureaucrats who participated in economic development maximized the efficiency of economic development by demonstrating their leadership in their respective fields. In the latter period, not only government officials but also private experts were involved to formulate economic policies (Butsaban, 2019). Likewise, from the beginning of the Korean Wave to a global phenomenon, the government's Hallyu policy has changed and developed in a timely manner. In the case of Korean dramas, which was the starting point of the Korean Wave, the government implemented a policy

of exporting dramas to demanding countries. During the period of the K-POP craze, the K-POP promotion policy was strongly promoted. The government increased the Hallyu budget and established base institutions to form governance in which government agencies, private organizations and experts participate. The Korean government's role and policies were especially critical in times of crisis, such as Chinese government's ban on everything Korean.

The Korean government's timely implementation of policies and intervention in each stage of the Korean Wave helped the Korean Wave to develop to what it is today and positioned Korea as a world-leading country in the field of culture, while also supporting mutual growth through two-way cultural exchanges with other countries that look beyond national interests.

Notes

¹ Five policy pillars: ① from regulation to autonomy, ② from central to regional, ③ from creation to nostalgia, ④ from division to unification, ⑤ to a wider world

Five policy tasks: ① Establishing the national spirit, ② Vitalizing local culture and providing equal cultural welfare, ③ Enhancing cultural creativity and improving the environment for cultural development, ④ Supporting the development of the cultural industry and the revitalization of corporate culture, ⑤ Creating the *hankyoreh* (one people) culture and realizing the globalization of Korean culture

² Ministry of the Interior and Security, Presidential Archives' Records Collection, Policy Records, Cultural and Civilian Government: The period under 14th President Kim Young-sam (February 1990-February 1998) <https://www.pa.go.kr/research/contents/policy/index0606.jsp>

³ Oh Chun-ho (1997), "The first Korean Pavilion for related industries at the world's largest MIDEM ASIA97 Music Expo in Hong Kong", The Korea Economic Daily (May 15, 1997) <https://www.hankyung.com/life/article/1997051501511>

⁴ Kim Ji-young (2017), "[Back to the Dong-A/September 13] The Busan International Film Festival launches in 1996", Dong-A Ilbo (September 13, 2017) <https://www.donga.com/news/Culture/article/all/20170913/86309961/1>)

⁵ Song In-hwa (2021), "From a 'Korean games trade show' to the top games exhibition in Korea", Viewers (November 15, 2021) <http://theviewers.co.kr/View.aspx?No=2113915>

⁶ Ministry of Culture and Tourism (2000), "Vision 21 for Cultural Industries: The Five-Year Plan for Promoting the Cultural Industry."

⁷ Ministry of Culture and Tourism (2001), "Support Measures for Cultivating the Hallyu Industry."

⁸ Ministry of Culture and Tourism (2003), "Policy Vision for the Cultural Industry to Become

a Cultural Powerhouse.”

⁹ Ministry of Culture and Tourism (2005), “C-Korea 2010.”

¹⁰ Chosun Ilbo (2004), “The first Asia Song Festival to be held on the 26th” (November 24, 2004) https://www.chosun.com/site/data/html_dir/2004/11/24/2004112470323.html

¹¹ Cultural Contents Industry Promotion Committee (2011), First Basic Plan for Promoting the Cultural Contents Industry (2011- 2013).

¹² Ministry of Culture, Sports and Tourism (2011), “Ministry of Culture creates a Global Contents Fund sized 123.6 billion won.” https://www.mcst.go.kr/kor/s_notice/press/pressView.jsp?pSeq=11745

¹³ SBS News (2009), “Aiming to become a ‘Reputable Country of Culture’...Plans to intensively support core contents” (December 16, 2009), https://news.sbs.co.kr/news/endPage.do?news_id=N1000685141

¹⁴ National Planning Committee (2017), Five-Year Plan for State Administration of the Moon Jae-in Government.

¹⁵ Ministry of Culture, Sports and Tourism (2021), The state briefing on the New Southern Policy, <https://www.korea.kr/special/policyCurationView.do?newsId=148853887>

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