Netflix makes K-content go global

Understanding the dynamics of SVOD platforms in Korean content production

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ABSTRACT

With the increasing amount of subscription video-on-demand (SVOD) platforms, strategies of SVOD platforms continue to disrupt traditional television practices. In particular, SVOD platforms have been engaging in original programming to distinguish themselves from other SVOD platforms. As Netflix is the first SVOD platform to go global, studies have been conducted to understand the relationship between Netflix and the specific national markets to gain an understanding of Netflix's strategies in transnational context. This gives insights into how global corporations such as Netflix operate in national television markets and what the articulations of local creatives are about emerging global SVOD platforms.

As the presence of Netflix is increasing in Korean content production and more global SVOD platforms are entering the Korean content production market, the aim of this thesis is to provide a better understanding of SVOD platform practices and discourses in the Korean television industry. This is why the proposed research questions are: what are the discourses on Netflix in Korean content production? What are the production practices of Netflix in Korea? What are the production practices of local SVOD platforms?

In order to answer these research questions, publicly available online news articles, official press releases and trade press coverage discussing Netflix's involvement in Korean content production and production practices of local SVOD platforms are used for analysis. The analysis is a practice and discourse analysis, followed from media industry studies approach. The analysis revealed the following main themes: development of Netflix in Korean content production, working with Netflix, Netflix contributing to the local creative ecosystem, recognition for Korean content, local efforts for Korean content to go global, and concerns and future prospects.

The findings reveal that SVOD platforms form strategic partnerships in order to strengthen production capabilities. Despite having creative freedom while working with Netflix, Netflix controls and manages the whole process of production. As concerns grow among local SVOD platforms about their positioning in the SVOD platform industry, Netflix is showing that they are no threat to the local creative ecosystem but are contributing to the local creative ecosystem instead. Whereas Netflix is making efforts to increase their presence in the local market, local SVOD platforms aim to go global and are utilizing similar strategies as Netflix.

KEYWORDS: *Netflix, subscription video-on-demand, transnationalization, Korea, production practices*

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1. Introduction

Since the post-network era of the television industry, there is an ongoing discussion about the development of subscription video-on-demand (SVOD) platforms and how these SVOD platforms reshape the television industry. Technological innovation and economic changes are what differentiates SVOD platforms from traditional television practices (Lotz, 2017). For instance, economically, SVOD platforms have different business models than television networks to distribute content and digitization allows SVOD platforms to distribute content on-demand and are therefore no longer restricted by distribution windows of television broadcasting networks (Havens and Lotz, 2017). Furthermore, the emergence of SVOD platforms leads to 'cord-cutting' behavior of consumers, meaning that media consumers will cancel traditional television and choose to subscribe to SVOD platforms instead (Burroughs, 2019). Because of these different SVOD platform practices, as opposed to traditional television practices, there is an ongoing discussion amongst media industry scholars about the meaning of these different practices on the traditional television industry. While SVOD platforms could be threatening the traditional television industry (Burroughs, 2019), SVOD platforms also appears as a new phenomenon which co-exist with traditional television practices and therefore do not suggest the end of television (Wayne, 2020, p. 153). To add to this discussion of SVOD platform practices reshaping the television industry, the aim of this thesis is to add knowledge to existing research by analyzing and understanding SVOD platforms with regard to production practices within a transnational context.

In particular, the strategies of SVOD platform Netflix have been a dominant topic as it was the first SVOD platform to disrupt the traditional television industry (Robinson, 2017). Researchers have been examining Netflix's industry practices concerning its different approach in organization, distribution, and branding (Jenner, 2018; Lobato, 2019; Buck, 2019). Furthermore, Netflix engaging in original programming in addition to distributing content leads to different practices as well, compared to television practices. For example, Netflix, as a streaming service is setting itself apart from traditional television through advertising strategies and discourses (Tryon, 2015). Especially after Netflix starts producing original content, Netflix introduces binge viewing as a new practice of television viewing and uses it to brand their content as quality TV. To encourage the practice of binge-watching, Netflix releases their series all at once, in order for consumers to watch all the episodes at once, opposed to traditional television series which are distributed on a weekly basis. This practice of binge-watching encourages participation of the consumers with the media content (Burroughs, 2019). However,

binge-watching can be a passive practice too, as the attentiveness of viewers vary depending on the content (Steiner and Xu, 2020).

As SVOD platforms continue to go global, scholars have been paying attention to the developments of SVOD platforms in global television from a transnational context (Shimpach, 2020; Jin, 2020). Lotz (2021) argues that multinational SVOD platforms are changing the dynamics of transnational video distribution. A strategy Netflix has been utilizing is mass customization (Havens and Lotz, 2017, p. 17), which in Netflix's case is to distribute local contents to appeal to various national markets. In addition to distributing local content, Netflix commissions and produces a significant amount of content outside the United States as well (Lotz, 2021). Netflix has been heavily investing in producing original local content, especially in South Korea (hereafter Korea) (Netflix, 2019a; Netflix, 2019b). Although other global SVOD platforms besides Netflix are also starting to engage in Korean content production such as Disney+, through partnerships with Korean corporations (Na, 2022; Song, 2021). Netflix was the first global SVOD platform to enter the Korean market and remains the prominent global SVOD platform involved in Korean content production. Furthermore, Netflix established a separate content office in Korea, the first country in Asia to have one (B. W. Kim, 2020), and announced the establishment of two production facilities in Korea (Netflix, 2021). This is why this thesis is mainly focused on Netflix's practices and discourse on Korean content production.

In the meantime, as global SVOD platforms are trying to gain a foothold in the Korean television market, local corporations are establishing domestic SVOD platforms, for example TVing, established by media & entertainment conglomerate CJ ENM, Wavve, run by broadcast stations KBS, SBS, MB and telecom operator SK Telecom, and independent SVOD platform Watcha. Domestic SVOD platforms are likewise engaging in original content production to differentiate themselves by providing exclusive content as opposed to other SVOD platforms.

For these reasons, it is relevant to study the dynamics between global SVOD platforms and the local television market; how global corporations such as Netflix operate in national television markets and what the articulations of local creatives are about emerging global SVOD platforms. Thus, in a broader media industry context, this research aims to provide a better understanding of SVOD platform practices and discourses in the television industry within a transnational context, in this case Korea. As the presence of Netflix is increasing in Korean content production and more global SVOD platforms are entering the Korean content production market as well, it brings new challenges and opportunities to the Korean television industry. Therefore, the aim of this thesis is to examine the relationship between global SVOD

platforms, particularly Netflix, and the Korean television market. This is why this research proposes the following research questions:

Main RQ: What are the discourses on Netflix in Korean content production?

Sub RQ1: What are the production practices of Netflix in Korea?

Sub RQ2: What are the production practices of local SVOD platforms?

Above research questions will be answered by analyzing official press releases, online and publicly available news articles, and trade press coverage that discusses Netflix's involvement in Korean content production and production practices of local SVOD platforms. The findings of the analysis will contribute to existing research by giving new insights in the presence of Netflix in the production of Korean content and revealing the dynamics between Netflix and local SVOD platforms in Korea regarding content production.

Following, the second chapter will discuss related research done on the topics: SVOD platforms in the television industry, the television industry in transnational context, global SVOD platforms in national markets and Korean SVOD platforms. The reason for discussing research on these topics is to provide a better understanding on these topics and to argue how this research aims to contributes to existing research. Next, the third chapter serves to explain the methodological approach, process of data collection, and the method of data analysis for this research. Then, the fourth chapter will discuss the results of the analyzed data in five themes: development of Netflix in Korean content production, working with Netflix, Netflix contributing to the local creative ecosystem, recognition for Korean content, local efforts for Korean content to go global and lastly, concerns and future prospects. Finally, the results will be concluded by answering the research questions and remarks on the limitations of this research and possible directions for further research.

2. Theoretical framework

The following chapter will first discuss previous research on SVOD platforms in the television industry and SVOD platforms in transnational context. This serves to explain the development of SVOD platforms and transnationalism within the television industry. Then, existing research on global SVOD platforms, in national markets will be discussed, which are all in relation to Netflix. Then, the Korean television market will be introduced to provide a short introduction will be given to Korean SVOD platforms to understand the industrial and cultural context of Korean SVOD platforms. Because of emerging global SVOD platforms in Korea, research on the presence of global SVOD platforms in Korea is increasing and will be discussed at last. These studies will serve as a basis to discuss the analysis later on in chapter 4.

2.1. SVOD platforms in the television industry

As briefly discussed in the introduction chapter, ever since the development of SVOD platforms, there have been numerous media studies research on this phenomenon and how it reshapes the television industry. This section serves to specifically discuss related research on changes in production practices and discourses of the streaming industry, in order to provide a better understanding of the industry context in relation to this research. Lotz (2014) notes the changes in the production process of television programs regarding creation, financing, and distribution and redefines the television industry in the United States. Key changes that Lotz (2014) identifies are new types of programming and different ways of organizing and branding content. By identifying production practices, it gives insight into the changing television industry and reveals new developments of emerging industry practices. Organizational norms are evolving as well. The organization of SVOD platforms is often characterized by work cultures described as 'creative freedom' (Navar-Gill, 2020). Although in the early stage of streaming platform production culture, Navar-Gill (2020) examined in 2017 whether there is a connection between the 'creative freedom' work culture and 'being data-driven', using interviews to analyze the discourse of writers. This research reveals that 'creative freedom' work culture can also lead to conflicts. Furthermore, the connection between 'creative freedom' work culture and 'being data-driven reveals the power imbalance between decision-making executives and creatives.

To gain an understanding of the discourses within the industry, Havens (2008) coined the concept of 'industry lore', which is defined by the ideas and assumptions among industry professionals about what kind of media culture and content audiences desire and what will be commercially successful. Industry workers follow these common ideas and assumptions within

the industry, in addition to organizational norms (Lotz, 2017). Building upon the concept of industry lore, Burroughs (2019) conceptualizes the theory of 'streaming lore', a reconstruction of industry lore. He explains that with the development and growing dominance of streaming industries in media industries, there is a need to attend to the emergence of streaming logics as a result of streaming technology and distribution. Furthermore, Burroughs notes the importance of further research on discourses and logics of the streaming industry (Burroughs, 2019, p. 15). For example, Smith (2018) compared content produced by Netflix and HBO in order to find common and differences in production practices, and Lotz (2019) examined the production practices on a meso-level, with the focus on shifting financial practices in the United States television industry before and after SVOD platforms, using Netflix as example. Both examples show the differences in production practices that SVOD platforms bring, on individual production and industry level. This is why this thesis will focus on both production practices and discourses of SVOD platforms in Korea. By identifying production practices of Netflix and local SVOD platforms, and examining articulations of local creatives, it will give insight into developments within the streaming industry and the current dynamics among SVOD platforms on individual and organizational level.

2.2. Television industry in transnational context

As media globalization is one of the dynamics of change within the media industries in the twenty-first century (Havens and Lotz, 2017, p. 15), scholars have been examining the television industry in transnational context. Van Keulen et al. (2020) discuss the transnationalization of production practices in TV production conglomerates, examining both practice and discourse, and argue that transnational network structures, strategies and management practices influence industrial practices and stimulate a transnational production culture. In addition to trade press articles and company statements, in-depth interviews were also utilized for analysis. Through the analysis on individual and organization level, this study gives insights into production practices within television production and the perspective of local managers (van Keulen et al., 2020, p. 754). In this competitive environment, the efforts of TV production conglomerates from the perspective of local managers, to stimulate a transnational production are evident. This sparks curiosity to the perspective of local workers and their perspective on the stimulation of a transnational production culture environment. Research on international production from the local perspective has also shown that despite U.S. media conglomerates dominating the television industry, local companies see international production as a positive experience. For example, local companies in Prague

embrace international production and see working with Western productions as a way of learning in order to develop and strengthen their own local production system (Szcezepanik, 2007). Not only beneficial in terms of production practices but engaging in transnational production is also practical when it comes to funding. Mikos (2019) discusses transnational television on three levels. The first level consists of production and distribution of television including TV technology, economy, media policy, and legislation. The second level contains television texts and the third level includes television audiences. He traces the development of transnational television in these three levels and notes that the cultural and legislative context of international co-productions are crucial, especially in the starting phase of the production. SVOD platforms in the United States increased the production value of television series because they have been increasing the budgets (Mikos, 2019, p. 79). Thus, Mikos argues that engaging in international co-productions were a reason to gain a higher budget for television series.

After the global expansion of Netflix's service in 2016, launching its service in 130 more countries, Netflix takes the lead in SVOD platforms going global with Netflix operating its service in 243 countries (Netflix, 2016). However, not every content is available in every market because distributing rights are usually country-specific. From the perspective of Netflix, the rights are simply too costly or right holders do not want to license their content to Netflix (Aguiar and Waldfogel, 2018). With Netflix producing original content, Netflix holds the distribution rights in every market and will therefore be less dependent on others. With other SVOD platforms expanding their markets to overseas as well, SVOD platforms have an increasing presence in the global television industry.

The increasing presence of SVOD platforms across national borders leads to further research on how SVOD platforms are transforming the television industry in transnational context. In order for Netflix to become successful in national markets, Netflix invests heavily in localization strategies such as a country-specific library with more content suitable to local viewer's tastes and offering content in a variety of languages through dubbing and a variety of subtitles. Research on the distribution strategies of Netflix in transnational context shows that the presence of Netflix in local markets differs per national market, due to country-specific television market, regulations and policies and cultural norms (Lobato, 2019). Similarly, when looking at the wider cultural and industry dynamics of SVOD platforms on production practices in transnational context, the complexity and implications of global SVOD platforms entering the national markets becomes apparent. Netflix faces various challenges when competing in national markets, while local television networks are feeling threatened by Netflix (Lobato and

Lotz, 2020). In the same way, Netflix has been competing with local SVOD platforms after entering the Korean market. Therefore, practices and discourses on Netflix will be examined to understand the strategies and involvement of Netflix specifically in the Korean market.

2.3. Global SVOD platforms in national markets

Conducting research on SVOD platforms in national markets often take Netflix as the object of analysis because it utilizes different distribution strategies, uncommon business model and disrupts the traditional strategies within the television industry and video distribution strategies through temporal and spatial windowing (Lobato and Lotz, 2020). In addition, taking Netflix as the object of analysis, is useful "for studying a wider set of cultural, commercial, and political responses to the entry of a foreign service into national media environments" Lobato and Lotz, 2020, p. 134).

The trend of SVOD platforms going global and the efforts of SVOD platforms to become successful in other territories led to further research on SVOD platforms within the media industry studies. Many researchers have examined the relationship between global SVOD platforms in national markets and the dynamics between these SVOD platforms in national markets (Nafees et al., 2019; Wayne, 2020; Tse, 2020) and across national markets (Wayne and Castro, 2021). Netflix believed that India would be a good market to focus on to expand their presence as it has a large population, with a young population who are digital savvy and who aspire to western lifestyles (Nafees et al., 2019). However, Netflix was challenged to grow and keep its number of subscribers because of the competitive SVOD platform market with the already well-established SVOD platform Hotstar. In Israel, the strategy of Netflix was to partner up with local television providers and utilizes this to promote their platform in the local market (Wayne, 2020). Furthermore, in a cross-national comparative research, Wayne and Castro (2021) examined the relationship between Netflix and national pay-television providers in Israel and Spain through formed partnerships to reveal the localization process of global SVOD platforms in these nations. Despite a different market, this study revealed that Netflix conducted a similar approach in both the Israeli and Spanish market. Tse (2020) exemplifies the importance in understanding cultural and industrial structures of a nation by comparing the discourse on the arrival of Netflix in two East Asian markets, Japan and Taiwan. With a lacking SVOD platform industry in Taiwan, the discourse on Netflix entering the local market was positive and was not viewed as threatening to the local SVOD platform industry. Co-productions between Netflix and Taiwanese production companies are even sees as valuable within the local media industry because it leads to the global spread of

Taiwanese content through Netflix's distribution, but do not threaten the further development of the local industry due to local regulations (Tse, 2020). In Japan however, the discourse on Netflix's arrival in Japan mainly implied the threat of Netflix against local SVOD platforms because Japan already had a well-established local SVOD platform industry. Despite Netflix's efforts, it appears that Netflix is not posing a threat to the local market enough due to the availability of content on Netflix in Japan not being suitable to the taste of the Japanese audience (Tse, 2020).

The importance to conduct research on local studies of transnational media with the focus on SVOD platforms is demonstrated by Rios and Scarlata (2018) as they conducted a comparative study on Australian SVOD platform Stan and Mexican SVOD platform Blim. On an organizational-level, this study shows how competing with Netflix impacted local television production by analyzing two local SVOD platforms from different countries. But also within the local market, it is valuable to compare SVOD platforms on an organizational-level. For example, Castro and Cascajosa (2020) examined and compared the production culture of global SVOD platform Netflix with local SVOD platform Movistar+ in the Spanish market, showing how both a global SVOD platform and a local SVOD platform are expanding and transforming the local production culture.

Taking Netflix as main object of analysis, this research aims to understand the dynamics between Netflix in the Korean market. In a wider context, this research gives insights in the local discourses to the presence of Netflix in Korean content production. In addition, by examining practices of local SVOD platform TVing, this research aims to show how competing with Netflix impacts local SVOD platforms and what the presence of a global SVOD platform and a local SVOD platform means for the production culture in Korea.

2.4. The Korean television market

As one of the purposes of this study is to understand SVOD platforms in in the local context of Kora, this section will provide necessary knowledge on the Korean television market to understand the Korean television market when Netflix actively starts producing original content in Korea.

Since 1991, the Korean television market has been dominated by the three largest public broadcast television networks Korean Broadcasting System (KBS), Munhwa Broadcasting Corporation (MBC), and Seoul Broadcasting System (SBS) (S. Shim, 2008). After economic factors and measures of the Korean government in using Korean cultural products to promote Korea as a form of soft power, Korean television series, also named K-dramas were the cultural

product to initiate the phenomenon Korean Wave in the late 1990s (Schulze, 2013). The Korean Wave refers to the export of Korean cultural products and the growth of Korea's cultural industries. Although the Korean Wave was initially focused on K-dramas and film, The second wave of the Korean Wave, which started around 2008, shifted towards Korean popular music (K-pop) (Jin, 2016). Furthermore, while the first Korean Wave mainly reached other Asian countries, due to linguistic and cultural commonalities (Straubhaar, 1991), the second Korean Wave also gains a presence in the North American, South American and European market (Jin, 2016).

The export of cultural products could be affected due to political disputes and changing regulations. Over the years, the largest market for the export of K-drama's is China. However, in 2016, the export of K-dramas decreased due to China cutting off the import of Korean content, as a result of China opposing to the Terminal High Altitude Area Defense (THAAD) in Korea (KISDI, 2020). Losing such a large market causes Korea to turn to other export markets. Since 2016, the export to the Unites States increased due to the arrival of Netflix and signifies that Netflix heavily imported K-dramas (KISDI, 2020). This shows how global SVOD platforms could affect the Korean cultural industry.

2.5. Korean SVOD platforms

This following section will discuss the current SVOD platforms in Korea which will be useful to understand the industrial context and previous studies on web dramas in Korea to understand the societal and cultural context of local SVOD platforms in Korea.

Web dramas emerged as a new form of digital content in Korea (J. M. Kang, 2017). Local streaming service Naver TV cast, the most popular streaming service at that time, started the trend of producing web dramas. J. M. Kang (2017) argues that producing web dramas created more opportunities for creators as they did not have to rely on the limited distribution system of broadcasting networks. The web dramas were specifically produced to be easy to watch on smartphones and the target audience is focused on young adults and teens in Korea. This is because of the emergence of "snack culture", a concept which is defined as consuming cultural goods within a short period of time due to a busy lifestyle. This is also why web dramas in Korea had a short duration, consist of easy-to-follow storylines, for people to be able to watch it easily on-the-go on their mobile phone or during a break (G. H. Kang, 2020). Furthermore, the development of web dramas were actively supported by the government through organized festivals and events related to web dramas (J. M. Kang, 2021).

To provide a better understanding of the current streaming industry in Korea, the following paragraph will briefly introduce the most prominent local SVOD platforms. The three main national broadcasting networks Korean Broadcasting System (KBS), Seoul Broadcasting System (SBS) and Munhwa Broadcasting Company (MBC) established the SVOD platform POOQ in cooperation in 2012. In 2016, a joint venture between SK telecom and SK broadband launched the local SVOD platform Oksusu, who also provided exclusive content in attempt to stay ahead of Netflix with their own strategy (K. H. Kim, 2016). In 2019, POOQ and Oksusu joined forces and merged into SVOD platform Wavve. In particular, Wavve became the first Korean SVOD platform to invest in blockbuster drama, showing its strategy to create original content (J. Y. Moon, 2019). Next to Wavve, there is SVOD platform TVing, established under the Korean Entertainment conglomerate CJ ENM. And lastly to be discussed is independent SVOD platform Watcha, an SVOD platform focused on distributing and producing non-mainstream content. When Netflix entered the Korean SVOD market, it was already highly competitive with various local SVOD platforms. Compared to Netflix, local SVOD platforms are low priced, or even free because the local SVOD platforms are established by television broadcasting companies, cable TV systems, and telecom providers and thus offered bundled packages with the SVOD platform included. In Korea, the SVOD platforms serve as an extension of television rather than SVOD platforms taking over the television industry (E. C. Park, 2017).

2.6. Global SVOD platforms in Korea

Lastly, this section will discuss previous research on the arrival of global SVOD platforms, particularly Netflix, in the Korean market and the main topics of discussion amongst researchers on the perspective of global SVOD platforms in Korea.

The main financial resource of K-dramas is through advertisements, but this changed with the arrival of global SVOD platforms, as exemplified by a case study of *Mr. Sunshine* (2018) (H. C. Kim, 2019). Similar to the arrival of Netflix in Japan, Korea had a well-established local SVOD platform market. Despite the efforts of Netflix to attract local subscribers, Netflix was initially limited in its inability to provide attractive content for the Korean audience. This is why Netflix heavily invested in collaborating with local service providers and acquiring local content (KISDI, 2018). As Netflix paid for the broadcasting and copyright of the K-drama to be able to distribute it globally, Netflix covered most of the production costs. Following this strategy, cable networks such as tvN and JTBC are attracting investments to expand their production abilities instead of relying on advertisements as

opposed to terrestrial broadcasting networks (H. C. Kim, 2019). Similarly, Y. Kim (2022) analyzed the impact of global streaming platforms on locally produced media content through a case study on *Mr. Sunshine* (2018), showing the impact of Netflix on the production of *Mr. Sunshine* (2018) in terms of financial support. As a result of increasing amount of Korean content through global SVOD platforms, researchers have been interested in the reach of Korean television to East-Asia and America through global SVOD platforms. Given the impact of SVOD platforms on Korean television, Ju (2022) discusses how Korean television is utilized by SVOD platforms to cater to viewers in America (Ju, 2022, p. 79-94).

As discussed earlier, with U.S. media conglomerates dominating the global media industry, the increasing expansion of global SVOD platforms into local markets leads to the threat of global SVOD platforms dominating the local markets. Building on the theoretical framework of cultural imperialism, which focuses on the power dynamics and structure of global cultural industries, mainly between the United States and other countries, Jin (2016) discusses the rise of platform imperialism. Similar to cultural imperialism, platform imperialism forces other countries to take over American ways and customs. As the presence of digital platforms are becoming more and more relevant, the fear of U.S. platforms dominating local digital platforms are greater than before (Jin, 2016). Despite advancing digital platforms in Korea, digital platforms from the United States remain significant and continues to actualize its global dominance (Jin, 2017, p. 227). However, Netflix was not discussed among the digital platforms as SVOD platforms such as Netflix did not yet gain a prominent presence in Korea. Therefore, it would be interesting to examine global SVOD platforms in Korea to see what the dynamics are between global SVOD platforms and local SVOD platforms, whether these global SVOD platforms from the United States dominate the local market as well.

Conclusion

Building upon existing research on SVOD platforms, the television industry in transnational context, global SVOD platforms in national markets, the Korean television market, local SVOD platforms in Korea and Netflix's presence in Korea, this research aims to add additional knowledge of Netflix's presence in the Korean television market. Moreover, research on Netflix in Korea has been mainly focused on Netflix as a facilitator of Korean content. But as the trend of global SVOD platforms getting involved in producing original content increases, it is important to examine the production culture of global SVOD platforms in these national markets to understand the dynamics between those SVOD platform. Which is why this research

will focus on production practices of Korean content rather than mere licensing of Korean content. Furthermore, this study aims to gain a better understanding of discourses around SVOD platforms in Korea. With the growing presence of SVOD platforms in transnational context, it is necessary to see how these production practices continue to develop over time, providing new insights of global SVOD platforms regarding production practices in national markets like Korea, and how competing with global SVOD platforms impacts the local television market.

3. Method

This chapter serves to explain the method utilized for conducting the research. First, the methodological approach will be justified. Then, the process of collecting the data and the selection of data will be explained. Lastly, the method for analyzing the data will be clarified followed by an introduction to the main themes with their corresponding codes, which are leading to the analysis of the data.

3.1. Media industry studies approach

The main focus of this research will be on Netflix's production practices and discourses in Korean content and production practices and discourses of local SVOD platforms in original programming. Thus, for this research, the object of analysis are the organizations Netflix and Korean SVOD platform TVing, the largest local SVOD platform, and key individuals within these organizations and those who have a significant decision-making role for the production of the content of these organizations.

This thesis follows the methodological framework of a critical media industry studies approach (Havens et al., 2009). This approach seeks to understand how particular media texts develop and reshape industrial practices (Havens et al., 2009). It follows the believe that the way media gets made, influences what kind of media is made (Herbert et al., 2020). It distinguishes from other general methodological frameworks within the media and cultural studies, commonly used for examining industries, particularly political economy. While critical political economy studies also consider the issue of power dynamics, it gives little attention to key individuals and the role of these individuals within the media industries. Havens et al. (2009) argue that these individuals are crucial "in interpreting, focusing and redirecting economic forces that provide for complexity and contradiction within media industries (Havens et al., 2009, p. 236). To understand the production process, it is necessary to know what is being negotiated, what are the established partnerships, what becomes public and the reasoning behind these decisions. This is why this approach examines particular organizations, key individuals and practices within media conglomerates operating at a global level (Havens et al., 2009). Thus, the practices are examined to give meaning to the media and cultural industries by analyzing the discourses on a micro and meso level, between individuals and organizations, compared to the macro level perspective of the critical political economy approach.

To conclude, this research will be done on an organizational-level examining specific companies and key individuals that operate within the Korean television industry in order to gain a better understanding of the production process.

3.2 Data collection

In order to answer the proposed research questions, the data for this research is collected from online and publicly available statements from official press releases, interviews, and trade press articles. There is difficulty in obtaining access to certain corporate records due to organizations being protective and therefore not sharing data or insights into their practices. Therefore, interviews and trade press are valuable data in studies of individual corporations or production companies because these texts also provide discussion and awareness to the public and media professionals (Caldwell, 2008). Furthermore, trade publications contain detailed information about crucial industrial issues, events, and players, and are helpful in gaining background knowledge within the industry (Perren, 2015). However, trade press material should be examined critically. While using trade press material for research, data is limited by the reliability of the source and depended on the availability. Furthermore, the limitation of using trade publications is that these publicly available statements are mainly a form of commercial media (Newcomb and Lotz, 2012). Nevertheless, research using trade press articles are useful in gaining knowledge about shifting practices and adds to understanding of current issues and developments defining contemporary industry practices. Since the industry to be discussed is the Korean television market, most available and suitable data will be from Korean trade press articles from reliable newspapers.

The timeframe for collected data was limited to 2017 until present, starting from the release of *Okja* (2017) as this was the first Korean content co-produced with Netflix, in order to trace the development of the current dynamics between Netflix and local SVOD platforms. In total, fifty-three articles were collected, including news articles of interviews with Netflix representatives, representatives in the local streaming industry, Korean creatives who have collaborated with Netflix and official press releases from Netflix and TVing. These local creatives consist of individuals who collaborated with Netflix such as directors, writers, editors and CEO of local production companies. It is important to also examine local creative individuals such as managers, editors and writers as these individuals are crucial to the production and post-production process (Lotz, 2014). The articles were selected if it includes Netflix's and local SVOD platform production practices in Korean content production, statements by Netflix and local SVOD platforms regarding production practices and/or statements by local creatives within the Korean media industry regarding Netflix's involvement in production. Official press releases are collected from Netflix's newsroom and CJ ENM's newsroom, the media conglomerate who established TVing. The sources of news articles are

from Korean online newspaper websites such as Chosun, Maeil Business, Donga Ilbo, News1, and trade press Cine21.

3.3. Data analysis

In addition to production practices, the data was also analyzed in discursive context. Freeman (2016) defines qualitative approach in discursive context as follows: "…the ways in which media practitioners narrativise the transformation of deep social structures into clear sets of meanings and understandings about the media industries" (Freeman, 2016, p. 132). The transformation to be examined here is the process of the increasing presence of Netflix as a production player in Korea and to understand the discourses about Netflix in the Korean media industry. This research follows Jensen's theoretical framework of discourse analysis as a way of figuring out the transformation of social structures into sets of meanings and understandings about the media industries (Jensen, 2002). This framework consists of two moments in data analysis: heuristic coding and discourse analysis. The process of heuristic coding consists of a preliminary and constant coding process of verbal and other codes to different elements and structures of the dataset, followed by the discourse analysis, which refers to the definitive and detailed categorization of the extracted data during heuristic coding (Jensen, 2002, p. 248).

To analyze the data, the articles were coded by identifying patterns of the statements about production practices and discourses of Netflix and local creatives, using qualitative software ATLAS.ti. In total, twenty-one codes were identified according to the context of the statements. These codes were then categorized and grouped into six main themes:

1. Development of Netflix in Korean content production: production practices and statements that accounts for Netflix's increasing presence in Korean content production.
2. Working with Netflix: discourses of local creatives regarding Netflix's presence in Korean content production.
3. Netflix contributing to the local creative ecosystem: practices and discourses about Netflix contributing to the local creative ecosystem.
4. Recognition for Korean content: discourses on the increasing amount of Korean content production.
5. Local efforts for Korean content to go global: production practices of TVing and discourses on local SVOD platforms.
6. Concerns and future prospects: concerns from local SVOD platforms about the increasing presence of global SVOD platforms in local content production.

Each of the main themes will be discussed in detail in the Results chapter.

MAIN THEME	CODE
Development of Netflix in Korean content production	partnership – investing in Korean content production – collaborating with local creatives
Working with Netflix	opportunity – Netflix production style – creative freedom – whole process – unknown rating
Netflix contributing to the local creative ecosystem	innovation – contribution to local creative ecosystem
Recognition for Korean content	why Korean content - global popularity – recognition for Korean content – global growth – global audience
Local efforts for Korean content to go global	Korean content going global – local partnership / acquisitions – local strategy.
Concerns and future prospects	concerns – dissatisfaction – policies

Table 1: Coding scheme.

4. Results

This chapter will discuss the findings of this research according to the main themes which were mentioned in the previous methods chapter. The order of the themes is arranged in relation to each other to discuss the dynamics between Netflix and local creators in the Korean content production. The analysis will consist of statements offered by Netflix officials and local actors in the Korean content production in addition to production practices of Netflix and local SVOD platforms. To conclude, the following sections will discuss the main themes: development of Netflix in Korean content production, working together with Netflix, Netflix contributing to the local creative ecosystem, recognition for Korean content, local efforts for Korean content to go global, and lastly, concerns and future prospects.

4.1. Development of Netflix in Korean content production

After launching its service in Korea in 2016, Netflix announced its first co-produced Korean content release with the movie *Okja* (2017). Afterwards, *Love Alarm* (2019) was announced in 2017 to become Netflix first Korean original series, in partnership with local production company Hidden Sequence (Netflix, 2017). However, in 2018, Netflix announced that Love Alarm would be produced by Studio Dragon (Netflix, 2018). Following cooperation between Netflix and Studio Dragon in content production, they entered into a long-term partnership of three years starting from 2020 (Netflix, 2019a). This strategic partnership was an agreement between CJ ENM, the parent company of Studio Dragon, its subsidiary production company Studio Dragon and Netflix. According to Netflix, this partnership shows their commitment to Korean entertainment and allow them to bring more top-tier Korean drama to its members in Korea and all over the world (Netflix, 2019a). According to the CEO of Studio Dragon, the partnership shows recognition for Korean storytelling and production capabilities and shows ambition to take it a step further as a global major studio. Likewise, CJ ENM's CEO puts emphasis on Korean content going global: "CJ ENM is leading the market and expanding its huge achievement in Korea to overseas… the partnership with Netflix will introduce Korean content to global audiences" (Netflix, 2019a).

A few days later, Netflix announced another deal with a local company, JTBC, which is a television network and broadcasting company (Netflix, 2019b). This quickly followed partnership, after the partnership with CJ ENM and Studio Dragon, does not come as a surprise, because CJ ENM and JTBC launched their joint platform TVing, a few months before this announcement (J. W. Ko, 2019). This deal is a multi-year content distribution agreement between Netflix and JTBC to co-develop content in addition to the licensing agreement in 2017

to distribute JTBC content. The representative of JTBC says that this agreement signifies "the trust between JTBC and Netflix" and will drive "JTBC's entrance into overseas markets as a global production house with high-quality content" (Netflix, 2019a). Likewise, The CEO of Studio Dragon says that "Studio Dragon will try its best to leap forward as a global major studio" and the CEO of CJ ENM argues that "the partnership with Netflix will introduce Korean content to global audiences" (Netflix, 2019b). The discourse on both announcements shows that JTBC and CJ ENM / Studio Dragon are both aiming to expand the global presence of their content and the aim to enter into overseas markets as a global production house. Furthermore, Netflix declares that they are looking forward to collaborating with local creative communities and partners, implying the willingness of Netflix to collaborate with more local creators.

Netflix announced the decision to acquire more Korean films as well as producing Netflix original films with local creators in addition to Netflix original series in November 2020 (Netflix, 2020). Kim Minyoung, the Vice President of Content at Netflix, argues that the decision for this is because Korean films such as *Parasite* (2019) and Netflix's *Time to Hunt* (2020) have been receiving positive reviews around the world (Netflix, 2020). Meanwhile, local filmmakers gained the opportunity to release their film on Netflix during COVID-19, after films like *The Call* (2020) and *Space Sweepers* (2021) gets picked up by Netflix for distribution (S. Song, 2020b). Films which were actually made for the movie theaters were forced to screen their film on SVOD platforms, this became a common distribution practice in the global film market after the pandemic (Li et al., 2023). Both directors expressing their regrets of not being able to screen their films in theaters due to the situation which restricted their efforts from being shown completely in terms of sound and special effects but were glad to hear different responses across nations. Afterwards, Netflix collaborates with more local filmmakers to work on film production such as Jeong Byeong-gil for *Carter* (2022) and Park Hyun-jin for *Love and Leashes* (2022).

What is interesting, is that amongst the directors who have worked on Korean Netflix original series, there are a great number of directors coming from film production, who are directing a series for the first time instead of a film. *Move to Heaven* (2021) director Kim Seong-ho always thought about creating a series, especially since it has been difficult to gain investors for producing movies and with Netflix investing, there was no reason for him to reject the offer (H. J. Yoon, 2021b). For the director of *Squid Game* (2021), it was also the first time producing a series, arguing that the advantages were that there is enough time for storytelling and the possibility to incorporate various genres for each episode. The downside was the

difficulty to write and film so much work alone (W. J. Jang, 2021). A few other series who also produced by filmmakers who engaged in producing original series for the first time in collaboration with Netflix are *Hellbound* (2021), *Narco-Saints* (2022), *Somebody* (2022), *Glitch* (2022).

After original series and films, Netflix began investing in unscripted shows as well. When asked about the success of Korean unscripted shows Yoo Ki-hwan, the manager of non-fiction content at Netflix Korea, defends that "…we still consider it a success if there is a positive response from Korean viewers" (Y. Kwak, 2022). However, Korean director and producer Heo Hang explains the difficulty for global SVOD platforms to produce Korean unscripted shows: they are often "too Korean" - there is too much talking and words on the screen, which makes them hard to translate and digest" (Mackenzie, 2023).

Meanwhile in July 2021, Netflix strengthens their position in the Korean streaming market by partnering with post-production company Dexter Studio and subsidiary company Livetone, which is one of Korea's top post-production companies in addition to collaborating with local production companies and creators (Netflix, 2021a). Through this partnership, Netflix strengthens their network of Korean content companies in order to elevate their Korean content production, specifically in color finishing and sound mixing. In terms of managing the production process, Korea is the first country in Asia where Netflix established a separate content office (B. W. Kim, 2020) and in 2021, Netflix announced that they will establish two production facilities in Korea in order to strengthen their ability to produce more content in Korea (Netflix, 2021b). The efforts to localize the production and post-production process, is a core feature of transnationalization in order to improve efficiency (Esser, 2007).

Starting from Netflix's entering the Korean market until present time, Netflix managed to form strategic partnerships with locally well-known production companies and cooperates with various local creators in order to produce original content in various forms of series, films and unscripted shows. In order to improve efficiency of the production process, Netflix also invests in an own content office, production facilities and partners with local post-production companies. Kang Dong Han, the vice-president of content of the Korea division argues that Netflix is accustoming to the ways of production Korean creators are used to (M. K. Shim, 2022). However, after working together with Netflix, local creators state suggests otherwise.

4.2. Working with Netflix

This section addresses the discourse from Netflix officials and Korean creators who work together with Netflix in relation to Netflix's production methods. The purpose of this is to gain

an understanding of the dynamics between Netflix and Korean creators during the process of content production. The main themes are opportunity, Netflix's production style, creative freedom and unknown rating.

Regarding the production of *Okja* (2017), director Bong Joon-ho claims that "it is because of Netflix that I was able to create this movie" (H. S. Han, 2017). Likewise, Lee Eung-bok, director of *Sweet Home* (2020) says "It would have been impossible if it wasn't for Netflix" (J. Lee, 2020), and *Squid Game* (2021) director Hwang Dong-hyuk state that "there was no other choice than Netflix" (W. J. Jang, 2021). This shows that Korean creators see working together with Netflix as an opportunity. With the amount of money Netflix invests in producing original Korean contents, this finding shows that while Netflix approved and invested in the production of these contents and being able to distribute these contents on their platform, locally, it was difficult for Korean creators to get funding or investments. This could be due to lack of funding and/or budget, or the content was not attractive enough to invest in or too bold to produce it for television broadcasting. To exemplify, the writer of *Kingdom* (2019) was told that because of the genre, it was impossible to air on television and was told to "go to the United States to make it" (J. H. Park, 2019; M. A. Lee, 2019a). Likewise, the director of *Move to Heaven* (2021) thought the genre was not suitable for television but it was possible with Netflix (H. J. Yoon, 2021a), and the producer of *Sweet Home* (2021) praises Netflix for supporting unusual stories and genres (CJ News, 2021a).

As Korea has a homogenous culture, working together with American company Netflix was intimidating at first (M. A. Lee, 2019b). There were questions of concern such as "would we be able to communicate in English" and "wouldn't it be difficult for foreigners who lack an understanding of the Korean content production system? (M. A. Lee, 2019b). Indeed, Writer Kim Eun-hee sensed during the pre-production stage with Netflix that it was difficult to communicate due to the language barrier. Back then, they met physically in the Singapore office. Kim Eun-hee could not exactly understand what they were saying as they all spoke in English (J. H. Park, 2019). Lee Sung-kyu started working for Netflix and took on a position he never heard of before: the physical production manager. A physical production manager manages everything that happens at the production location and it also oversees areas related to the filming site. Lee says that he thinks Netflix added the word physical to emphasize that it is a team that communicates closely with the site and participates in production (M. A. Lee, 2019b). The producer of *Sweet Home* (2020) also emphasized on communication, which was necessary due to having three directors and three writers in one team. Furthermore, while working on writing the script for *Kingdom* (2019), Kim Eun-hee writer kept contact with

Netflix to discuss details of the script (J. H. Park, 2019). This shows the importance of the ability to communicate and coordinate within a transnational production environment, not only within a team, but also with other departments, and for example with lawyers and consultants to oversee contracts (Mikos, 2019).

Some reorganizational/managerial practices are new to Korean creators as well. CEO of production company A-Story notices the quick process of discussing production and the amount of paperwork that came with it. He described the contracts as longer than the contracts with Korean broadcasters, being subdivided by guidelines and rules about subjects such as copyright and technology (M. A. Lee, 2019a). According to the Netflix Post-production Director of the Korea division Ha Jungsu, there is a global production guideline (M. A. Lee, 2019b). Netflix utilizes a Quality Control procedure, performed by Netflix employees. This might make directors feel uncomfortable because they get the feeling that their work needs to be verified. However, the post-production manager argues that he thinks it is a good addition as a way to go over technical matters. (M. A. Lee, 2019b). Netflix claims to be involved during the whole process of production: "We are working together on everything from planning to filming, post-production and distribution, to create a backward linkage effect" (J. H. Lee, 2021). These structures, strategies and management practices are needed to stimulate a transnational work environment and to work efficiently (van Keulen et al., 2020).

Another unusual process is the pre-production method of filming. The pre-production method is when all the content is filmed before release. For Netflix, this is necessary because Netflix also has to add subtitles and dubbing in post-production for its global audience, which takes some time before they can release it on the platform. In Korea, they are accustomed to the live production method, meaning they shoot simultaneously when the series is already airing on television, within about a two-week timeframe (Oh, 2015). This method is used because the producers can adjust the series when necessary, depending on the response of the audience. But with the pre-production method, Korean creators do not get any response from the audience at all, which makes them anxious (J. Y. Moon, 2022). However, the live production method receives a lot of criticism as the staff is often overworked as they urgently need to film to meet the schedule. Having experience with this production method in the field, the physical production manager wants to establish the pre-production method in the Korean production culture (M. A. Lee, 2019b). Another difference mentioned is the structure of a series as mentioned by director Lee Kyung-mi: "Because it's a Netflix series, I had to pay attention to the structure of the season as there are guidelines" (N. Y. Kim, 2020). Traditional Korean series usually consists of approximately 16 episodes with a duration of 70-80 minutes per

episodes and Korean web series have a short duration of around 15 minutes. Netflix Korean original content, particularly series, are formatted according to Netflix's convention as this format is optimized for binge-watching, with Netflix originals usually consists of 6-8 episodes with a duration of approximately 50 minutes per episode (J. H. Park, 2019). As explained by Havens & Lotz (2017), these established guidelines and structures of Netflix influence the production culture of the creators, and they stick to these guidelines and structures, because Netflix is convinced that it works (Havens and Lotz, 2017, p. 11).

In addition to the guidelines and structures of producing Netflix content, Netflix controls in detail about the kind of content they produce and particularly in the manner the content is being displayed on their platform. For example, in *Kingdom* (2019), Netflix seemed reluctant to include a scene where a dog had to be killed and in *Extracurricular* (2020), Netflix consulted with the Ministry of Gender Equality and Family and included a Korean helpline of the Youth Cyber Counseling Center at the end of each episode as a countermeasure because the series contains socially controversial topics (J. H. Park, 2019; J. S. Hong, 2020). As the show is distributed around the world, the subtitles encourage in case of needing help to call a local helpline instead. As the content is exclusively produced to be distributed on Netflix, the title of the content cannot have the same title as other content in the Netflix library. This is explained by the director of *My Name* (2021) who initially intended to name the series Undercover (J. S. Park, 2021).

Despite all of this, *Squid Game* (2021) director Hwang Dong-hyuk said in an interview that there were no limitations at all regarding the length, format, time or depicting nudity and violence (W. J. Jang, 2021). Creative freedom is surely a topic that has been discussed often during interviews with Korean creators. Lee Kyung-mi, director of *The School Nurse Files* (2020) reveals that she wanted to work with Netflix because she was curious about the freely creative process during content production (N. Y. Kim, 2020). For *Okja* (2017) Bong Joon Ho expressed that he had 100% control in terms of scenario, music etc. (H. S. Han, 2017). He told Yang, the editing director of *Okja* (2017) that he "could do whatever he wants because we have full editing rights" (J. H. Lee, 2017). Furthermore, producer of *Sweet Home* (2020) discusses the open environment of discussing ideas and opinions during the production process (CJ News, 2021a) and A-Story's CEO thinks that this way we do not have to limit the imagination of the writer (M. A. Lee, 2019b).

Thus, although it appears that Korean creators have significant freedom during the production process, within Netflix, the procedure prior to the production process appears to be complex. The work that the creative team wants to pursue has to go through a lot of departments

before it gets approved. Decision can easily be made if it is your own department but higher ups and co-workers from other departments can always question your decision and all information within the company is shared transparently (M. A. Lee, 2019a). In this way, Netflix always remains in control. This exemplifies the concept of Havens & Lotz (2017) of circumscribed agency, where agents have "some degree of individual autonomy, even though their autonomy is delimited by a range of forces including the cultures from which they come, the conventions of the media in which they work, and the priorities of their organizations and superiors" (Havens and Lotz, 2017, p.11).

Another notable theme that was often mentioned by local creators is the response of the content for the creators after release. Whereas drama directors and writers were used to having a television rating and movie directors had the box office to measure how many people have seen their work, Netflix does not reveal the rating for their content, not even to the creators of the content. This resonates with Burroughs (2019) concept of streaming lore as because the content is on a streaming service, there is ambiguity about the quality of television and the algorithmic audience. Kim Seung-yoon and Kim Hong-seon mentioned that they do not receive the rating and are therefore unaware of how well their content is doing in terms of reception but they do find out through the ranking on the Netflix platform (J. Y. Moon, 2022; S. Y. Kim, 2022b). CEO of A-story says that instead of the rating, nowadays the response on the internet is what determines the success of a content (M. A. Lee, 2019a). Thus, the success of the content is measured by discourses about the content.

To conclude, Netflix provides local creators with the opportunity to be able to produce content, opposed to local creators who are reluctant to produce certain content due to funding or narrative reasons. While working with Netflix, local creators encountered organizational and management differences between Netflix and local media companies. First of all, there is a language barrier between local creators and Netflix, followed by the need to follow Netflix's guidelines. Despite the need to follow Netflix's guidelines, local creators argue about the benefits of 'creative freedom' while working with Netflix, but also note the differences in content formatting and production method compared to what local creators are used to. Furthermore, due to anti-transparent policies of Netflix, local creators only know how their content is received by audiences through discourses about the produced content on the internet. While within the transnational production environment, it is necessary to have structure and management practices, it is clear that Netflix is taking the role of management in this position and control in terms of decision-making.

4.3. Netflix contributing to the local creative ecosystem

Besides Netflix giving opportunities to produce content, Netflix also introduces new resources and technologies and brand themselves as a contributor to the local creative ecosystem. The next section will discuss Netflix's practices and discourse relating to Netflix's contribution to the creative ecosystem of Korea. This serves to understand the position of Netflix within the local production industry and discuss the discourses on the impact of Netflix on the Korean market.

To work more efficiently, Netflix alters the workflow by designing supervisors to create a more responsible production environment (Netflix, 2022a; Netflix, 2022b). Other than a different way of producing content in terms of structure and management, Netflix also claims to have introduced new technologies and techniques to Korean creators such as spectral motion and special effects (J. Lee, 2020; CJ News, 2021a). In addition, Netflix Originals are shoot in 4K opposed to the usual 2K in Korea and after applying technologies such as Dolby Vision, and Atmos to the Korean production environment, Dolby Vision is claimed to be applied for almost all works created with Dolby Atmos used for almost half of Netflix's works (M. A. Lee, 2019b). Physical production manager Ha Jeongsu emphasized on the resources Netflix's brings: "I told them to make use of Netflix's resources" (M. A. Lee, 2019b). This shows that Korean creators were unfamiliar with certain technologies and techniques and that they were reluctant with utilizing Netflix's resources. For *Sweet Home* (2020), Director Lee Eung-bok disclosed that there was no team in Korea who could do special effects make-up for the appearance of the monsters and they had to look for specialists elsewhere (J. Lee, 2020). Also, through *Sweet Home* (2020) N-cam technology was introduced for the first time in Korea. This is a technology to make 3D design of the monsters look realistic on screen. Collaborating with American specialists who gained experience through works in Hollywood and using innovative technology was made possible because of Netflix's connections as it was a Netflix original production.

Through their partnership with Netflix, post-production studio Dexter Studio has added new technologies (Netflix, 2021b; Netflix, 2021c). What is interesting is the statement released by Netflix on the announcement of its partnership with Dexter Studio and Livetone. The statement was released in both English and Korean, but the tone is clearly different for each language. While recognizing quality Korean content, the English statement (Netflix, 2021b) uses words such as "thank all our ... for their support" and "collaborate with the post-production industry" to express the relationship between Netflix and local creators. In addition, the statement mentions the various efforts of Netflix collaborating with the local post-production

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industry. As opposed to this, the first sentence of the statement in Korean (Netflix, 2021c) starts off right away with the aim of Netflix to grow with the local creative ecosystem and its plans to put together a specialized post-production team in order to reach the full potential of the creativity of local creators, followed by mentioning the various efforts that have been made by Netflix to contribute to the local creative ecosystem. By doing this, it is evident that Netflix is positioning themselves to the Korean readers as providing support for local creators. Furthermore, Netflix once again mentions its wish to further expand their collaboration with local creators and says that by doing this, it will increase the status of the local creative ecosystem and contribute to global success of Korean content. The difference in tone shows that the statements are adjusted according to the targeted audience, with Netflix using their image of a contributor to the local creative ecosystem because it emphasizes on Netflix's contributions to the local creative ecosystem and how it will contribute to global success of Korean content in the Korean version, Netflix is branding themselves as contributor to the local creative ecosystem towards the Korean audience.

Notably, Netflix emphasizes their contribution to the local creative ecosystem in a report, released in September 2021. This report estimates the socio-economic impact of Netflix on the Korean creative ecosystem ever since Netflix entered the local market in 2016 (Netflix, 2021d). Netflix claims that their impact in Korea is not only apparent in the creative industry, but also spills over to the original IP content industry, consumer goods and tourism and consequently, presents that Netflix contributes to the globalization of the Korean Wave. Thus, with this report, Netflix is not only branding themselves with the image of contributor of Korean content, but also contributor to the other industries of Korea. The most prominent contribution is the number of jobs that came with Netflix, specifically in the content production industry (M. K. Shim, 2022). For example, CEO of Westworld, a special effects company, acknowledges the growth of his company since collaborating with Netflix, which grew from three employees to almost hundred (J. H. Lee, 2021).

Besides introducing new technologies in the post-production process and proving work opportunities, Netflix appears to be contributing to foster future talented creatives. Eyeline Studios, a subsidiary of Netflix, invests hundred million dollars to establish a new video production studio in Seoul. (D. Ko, 2022). This signifies strengthening the relationship between Netflix and the Seoul Metropolitan Government to further improve the local digital media industry. Moreover, the new production studio aims to educate future video producers on developing various skills such as filmmaking software and machine-learning algorithms (D. Ko, 2022). Netflix has also been holding events and webinars for educational purposes and will

assist in nourishing VFX creators in collaboration with the Korea Radio Promotion Association (R. S. Kim, 2022). This shows that local media professionals believe that there is much to gain by working together with Netflix and it serves as learning opportunities for local creators to improve their own local production system. Netflix (2022b) gives the reason for sharing their technologies with local creators to not only to improve future Netflix contents, but also contribute to the overall Korean production industry. However, this could also be seen as a manner of promoting their image of contributor to the local creative ecosystem.

In conclusion, the announcement of Netflix's partnership with Dexter Studio, exemplifies how Netflix positions themselves within the local media industry as a contributor to the local creative ecosystem, specifically only to the Korean audience. As official press releases are intended for industry individuals, Netflix is emphasizing on their image of contributor to the local creative system. Netflix takes this a step further by releasing a report arguing the socio-economic impact of Netflix on the Korean creative ecosystem. In addition, Netflix is aiming to improve the skills of local individuals by introducing resources such as new technologies and techniques and organizing various educational programs and workshops, which also adds to strengthening their image as contributor but also for the future.

4.4. Recognition for Korean content

The question then arises why Netflix would invest so much in producing original content, specifically Korean content. When announcing new partnerships, Netflix always acknowledges how loved Korean content on Netflix has been, as a way of reasoning why Netflix would invest further in Korean content production: "Korean content is impressing the world through Netflix" (Netflix, 2021c) emphasizing that "Korean storytelling and production abilities are beloved by global audiences" (Netflix, 2019a) and praises Korean content for its "incredible talent, bold stories and state of the art post-production facilities" (Netflix, 2021c), describing the Korean creative industry as "content creation prowess" and "world-class" (Netflix, 2019a; Netflix, 2022a). The then Netflix's Korean content vice-president Kim Min Young notes that the local creative ecosystem is very strong and well equipped and that the reason why Korean content is successful is because it focuses on emotional and human aspects compared to other foreign series (Nam, 2021). Moreover, the decision to invest in Korean content was in the past focused on creating content for the whole world but now Netflix focuses on making content enjoyable for Koreans, for it to be enjoyable across Asia, and the rest of the world (Nam, 2021). This shows the change in strategy. First, they wanted to make universal enjoyed content but now Netflix argues that the appeal lies in content with local elements. Later, the now Korean content

vice-president Kang said that from the beginning, Korean's content capabilities were of world-class standard (M. K. Shim, 2022). Similarly, Yoo Ki-hwan, the manager of non-fiction content at Netflix Korea, argues that content is considered successful when it is well received locally, rather than looking at the global audience (Kwak, 2022). Thus, this shows that when producing content, Netflix focuses on whether it will be attractive for its Korean audience rather than its global audience.

As shown in section 4.2., whereas drama directors were used to having a television rating and movie directors had the box office to measure how many people have seen their work, Netflix does not reveal the rating for their content, not even to the creators. The recognition for their content comes from discourses online, for example the director of *Money Heist: Korea – Joint Economic Area* (2022) could not believe the global popularity of the series (S. Y. Kim, 2022a) and the director of *The Sound of Magic* (2022) felt the global popularity when *The Sound of Magic* (2022) ranked fourth globally on Netflix (J. Y. Moon, 2022). Writer Kim Eun-hee spoke about the marketing for *Kingdom* (2019) and argues that it indicates recognition and trust in Korean content: "there must be a reason for spending so much on promoting Kingdom" (J. H. Park, 2019). Meanwhile, Korean directors and writers claim that Netflix invests in producing Korean content because of Korean storytelling, for example the director of *Sweet Home* (2020): "they welcome new attempts such as stories, materials, and genres that have not been released before, and support them accordingly" (CJ News, 2021a).

After the global success of Korean Netflix original *Squid Game* (2021), Creators of *Squid Game* (2021) have been recognized for their talents as there have been numerous nominations at global award ceremonies. This leads to more potential collaborations, including Hollywood (Jang, 2021). On the other hand, the global success of *Squid Game* (2021) also causes feelings of pressure for local creators but were overall happy that Korean content is finally gaining attention and looking forward to being rewarded for good results (J. S. Park, 2021). Director Yeon Sang-ho of *Hellbound* (2021) argues that the recognition is merely overflowing now, but that the recognition for Korean content was already there with great content building up over the years and are well-received globally because of incorporating universal themes in content (H. J. Han, 2021). On the other hand, Kim Yo-han, the CEO of Watcha believes that the reason is because Korea is cost effective when it comes to creating great content (Jeong, 2022). Likewise, Kang Ji-eun, the director of broadcasting and video advertising at the Ministry of Culture, Sports and Tourism also names overall high production competitiveness and cost-efficiency as the reason why may platforms are investing in Korea with the goal of entering the Asian market (Jeong, 2022). For example, Paramount+ is also

entering in the Korean market first, before spreading to other countries in Asia (T. H. Lee, 2022; CJ ENM, 2022).

The focus of Korean content reaching the world because of Netflix is also something Korean creators keep in mind while creating content. During the production process, they admit to analyzing the taste of global viewers finding ways to create content to appeal to the global audience (J. Lee, 2020, Jang, 2021; S. Y. Kim, 2022a; S. Y. Kim 2022b), or to focus on certain recognizable elements considering the reactions of previous similar works of the global audience. (CJ News, 2021a). While writing the scenario for *Love and Leases* (2022) relatable to people around the world, which is why Netflix was the best platform to work with. (Chosun Media, 2021). Director Lee Kyung-mi decided to collaborate with Netflix because she wanted to her work to be available to watch anytime and thought about appealing to audience but also adding local elements, to making it interesting for foreign viewers. (N. Y. Kim, 2020). Although unscripted show creator Na Yeong-suk worries about Korean unscripted shows being "too Korean" for global viewers, he expresses his desire for foreign audiences to love the show and believes that in order for shows to become successful globally, you need to cast globally well-known celebrities. (Mackenzie, 2023). After collaborating with Netflix on *Kingdom* (2019), CEO of production company A-Story is proud of the "amazing experience to see foreigners watch Korean dramas and pouring out reviews in English," (M. A. Lee, 2019a). After global recognition he says ambitiously that working together with Netflix, the biggest advantage was to gain experience in making global content, we have stepped foot in the global market. He is open to working with other global streaming platforms as "the goal is to enter Hollywood, no matter which company we partner with" (M. A. Lee, 2019a). This implies that Netflix provided the opportunity and is being used as a steppingstone for the production company to enter the global market.

Impressed with Korean storytelling and production capabilities, Netflix continues to invest in Korean content and believes that there is no difference in great content between local and global, what works in Korea, works globally too. Korean creators who have worked with Netflix argue that because of producing content with Netflix, it has opened doors for them to produce content globally (CJ News, 2021b; Jang, 2021). Which is why local creators are finding ways to make their content attractive for global viewers (CJ News, 2021a).

4.5. Local efforts for Korean content to go global

The general goal of media industries is to maximize profits by selling content products to the largest possible audience at the highest possible price, because a larger market means more

profit to be gained. (Havens and Lotz, 2017). This is why local SVOD platforms aim to go global. The CEO of A-Story has set his goal for the company to enter the Hollywood market: "if we succeed in the Hollywood market, we can gain an incredible amount of profit… not necessarily decided to make these works only as a Netflix original. "Whatever company we collaborate with, the goal is to enter Hollywood." (M. A. Lee, 2019a). Local content companies and local creators want to meet the global market. Likewise, local SVOD platforms have the same goal of bringing their platform to a global level. JTBC and CJ ENM created a joint OTT platform in 2019, TVing. JTBC explains that through cooperating with CJ ENM, it will raise the overall competitiveness of local media to a global level (J. W. Ko, 2019). In addition, CJ ENM and JTBC both note the importance of a system where the strategy is to not only constantly produce differentiated content but also to distribute content on various platforms and reinvest the profits in content. (J. W. Ko, 2019). Similar to Netflix, TVing's main focus is original programming (CJ News, 2021b). Afterwards, company Naver Corporations, owning various IP rights from webtoons and web novels, invests 40 billion won in TVing to strengthen cooperation and to produce content based on the IP of webtoons and web novels (K. B. Lee, 2021). The trend of producing content based of webtoons and web novels is also used by Netflix, for example, *Love Alarm* (2017), *Sweet Home* (2020), *Hellbound* (2021), *The Sound of Magic* (2022) and so on. Yoon Shin-ae, the CEO of local production company studio329 also wishes to continue experimenting with IP expansion and shows the desire of Korean creators to be able to lead the production of overseas (Yoo, 2022).

Becoming the leading local SVOD platform, TVing forming strategic partnerships with other SVOD platforms from the United States in order to take a step closer to become a global K-content platform. In December 2021, CJ ENM announced a partnership with ViacomCBS which does not only includes distribution of content but also content licensing and co-productions for original series and films (CJ Newsroom, 2021). This partnership served as the basis for the collaboration between TVing and Paramount+, the respective SVOD platforms of both companies. In June 2022, TVing joined hands with Paramount+ and announced a "brand hall" launch for Paramount+ in Korea (T. H. Lee, 2022). This means that Paramount+ content will be available in Korea through TVing with its own Paramount+ tab. This marks the first step of Paramount+ content into the Asian market. Both companies will in addition to licensing and distributing content, also co-produce original series and movies. They also established plans to produce Korean remakes of global franchise content and reality shows, which is possible by the owned IP rights. A month after TVing announced the merging with Seezn, a local SVOD platform which was established by telecom company KT Telecom to strengthen

their technology and service. (CJ ENM, 2022). Another strategy of TVing is to use external platforms to display CJ ENM's content by distributing their content on various SVOD platforms in the United States such as Amazon Prime Video, Apple TV and The Roku Channel (CJ Newsroom, 2022c; CJ Newsroom, 2022d; CJ Newsroom, 2022e).

In April 2022, CJ Newsroom (2022a) announced the launch of CJ ENM STUDIOS, which will focus on original content production specifically for suitable for streaming and for a global audience. The strategy was to recruit talented creators and acquire top production companies in order to strengthen the global competitiveness of CJ ENM. In addition to their multi-studio system, CJ ENM rebranded production subsidiary Fifth Season to further strengthens the global content production capabilities. (CJ Newsroom, 2022b). The CEO of CJ ENM Kang Ho-sung explained that with the multi-studio structure, it will provide CJ ENM with more opportunities to expand globally and expand production capabilities.

Furthermore, Kang invested in DreamWorks because he wanted to learn about the Hollywood system and the global standard for content (Seo, 2022). K-content is well received globally but because of intermediate operators and procedures in distribution process, CJ ENM wants to implement long-term projects, leading to a global strategy (Yoon, 2021c). Because of these efforts, TVing goal to go global has intensified is a short amount a time which is visible in their statements which started off as "strengthen the influence of TVing originals by producing… not only in Korea but also in the global market" in 2021 to "grow into a global number one K-content platform" in 2022 (Lee, 2021; Seo, 2022). Following the streaming lore of Burroughs (2019), TVing utilizes the same strategy to create OTT-optimized and different contents from its competitors. Specifically, TVing explained how the use of data affected determining the cast and the time of release for Tving's variety show *Girls High School Mystery Class* (2021) (CJ News, 2021b).

Local SVOD platform Wavve is also gathering capabilities to grow as a global K-content platform. Wavve believes that the strategy to gain global competitiveness is to join forces. After all, Wavve is established as a SVOD platform by the three main terrestrial broadcasting stations in Korea. Starting by acquiring the number one K-content platform KOCOWA, Lee Tae-hyun, CEO of Wavve reveals Wavve's strategy to gradually expand globally: "While establishing a synergy system with KOCOWA, we are also pushing for cooperation with various global media partners… our goal is to establish ourselves as the best K-content platform in the global market in a short time." (Content Wavve, 2022). Wavve does acknowledge the contribution of Netflix to the local market but argues that it is only one of the many SVOD platforms instead of being a sole K-content provider.

4.6. Concerns and future prospects

The last section of the results chapter aims to address the concerns and future prospects of local individuals within the SVOD platform industry, to understand the current concerns and discourses for the SVOD platform industry in local context. For this section, the sub-themes consist of concerns, dissatisfaction and policies.

Hwang Dong-hyuk, director of *Squid Game* (2021) questions whether it would be necessary to enter the global market if locally there would be the possibility to get enough budget and creative freedom (Jang, 2021). However, this is a statement from a standpoint of a director. If we compare this to the statement of production company CEO Lee Sang-baek, is the purpose of content creation: for creative purposes or to make profit? Because if *Kingdom* (2019) was produced with own funding and then distributed, it would have brought more profit to A-story. But Lee Sang-baek reveals that he has a long-term plan to gain more profit (M. A. Lee, 2029a). Mikos (2019) argues that creators work together with media conglomerates from the United States because they increase the budget. The budget of local creators is not comparable with global SVOD platforms from the United States. Even when the produced content becomes very successful, local creators do not benefit from it because Netflix owns the intellectual property rights of the produced content (Jeong, 2022). Kim Yo-han calls upon the role of the Korea Creative Content Agency (KOCCA) or the Ministry of Culture, Sports and Tourism in attempt to change the structure where producers must give all the copyrights to the platform to obtain production costs. However, it is especially difficult to regulate because there are different OTT contracts with each content having a different contract.

In respond, the director of broadcasting and video advertising at the Ministry of Culture, Sports and Tourism claims that they are reviewing support policies for funding based on IP sharing with production companies (Jeong, 2022). Egg is Coming, a subsidiary production company under CJ ENM Studios, is looking for ways of expanding intellectual property rights for series. Although Ko Chang-nam, Director of TVing doubts whether funding from the government will result in great content, he calls for support for related promotion policies and funding (Yoon, 2021c). He aims to be able to bring content to the viewers without intermediate operators and argues that various SVOD platform should exists to prevent Netflix from dominating the video streaming industry. Director of Wavve argues that the focus should be on creating a foundation for growth to be able to create content. (Jo, 2020)

The last section shows the current discourses of industry individuals on the development and concerns for the local SVOD platform industry. After the global success of *Squid Game* (2021), the local creators are not gaining profit from its success because Netflix

owns the intellectual property rights. Local creators are in constant discussion with KOCCA or the Ministry of Culture, Sports and Tourism in order to provide regulations to prevent unfair competition in the local market. Although authorities agree that there should be policies in support of local SVOD platforms, implementing policies is complex. Rather than depending on authorities, local industry individuals argue that policies and funding do not necessary mean that great content will be produced. Thus, the strategy of local SVOD platforms is to join forces in order to prevent what Jin (2017) termed as platform imperialism, namely that Netflix will dominate the local market.

5. Conclusion

In addition to existing research on SVOD platforms in transnational context, this thesis aimed to examine the dynamics between global SVOD platform Netflix and local creators. Especially as Netflix has been gaining a prominent presence in the local SVOD platform market and continues to invest in Korean content production, this study was specifically focused on the production practices and discourses on content production of Netflix and individuals, active in the local SVOD platform industry. Which is why this thesis aims to provide an answer for the following research questions: What are the discourses on Netflix in Korean content production? What are the production practices of Netflix in Korea? What are the production practices of local SVOD platforms? In order to answer the proposed research questions, this study analyzed official press releases, online and publicly available news articles, and trade press coverage that discusses Netflix's involvement in Korean content production and production practices of local SVOD platforms. This is done by analyzing production practices and discourses from a media industry studies approach. Additionally, this study discussed de dynamics between Netflix and local creators, local production companies and SVOD platforms, and the Korean media industry. Hence, on an individual, organizational and industry level.

The findings of this research show that Netflix's formed strategic partnerships with local production companies and collaborate with local creators which shows their efforts in Korean content production and continues to invest in Korean content production. In addition, by analyzing the discourse of key individuals who collaborate with Netflix, the perspective of local creatives shows that Netflix takes on a controlling and management role in the process of production despite the articulation of 'creative freedom' when working with Netflix. This reveals the power imbalance between Netflix, who is in charge of management and decision-making, whereas local creatives follow the guidelines and structures of Netflix. Although Netflix definitely brings beneficial resources to local content productions, it appears that Netflix is emphasizing on their image as contributor to the local creative ecosystem, which is apparent in discourse targeted towards the Korean audience and local industry professionals.

After working with Netflix, it appears that the experience of local creatives is overall positive. They see working with Netflix as a way of learning and gain knowledge on techniques and structures, which could be beneficial to use in other productions as well outside of Netflix. While Netflix initially invested heavily in Korean content to attract the local audience, local production companies see the opportunity to go global. Besides the television market, there has been significant changes especially in the film market as well after the COVID-19 pandemic, regarding film production, distribution and consumption (Li et al., 2023). Many movie theatres

were forced to close which resulted in delay of film releases. This causes films to be released through SVOD platforms (Li et al., 2023). This change has also been apparent in Korea as we see film releases which were actually meant for theatrical release. The distribution of Korean content through global SVOD platforms and increase in co-productions shows the global recognition for Korean content and contributes to the third Korean Wave (S. Song, 2020a).

Likewise, local SVOD platforms who are already well-established locally, have similar strategies to go global. Local SVOD platforms are following the same strategy as global SVOD platforms by focusing on producing original content to distinguish themselves from other SVOD platforms. However, with Netflix having a prominent presence in the local SVOD platform market, local SVOD platforms are concerned for their own position in the SVOD platform industry. To prevent Netflix from dominating the local SVOD market, local SVOD platforms are in strengthening their own production capabilities. In order to strengthen their own production and distribution capabilities, local SVOD platforms such as TVing, are forming strategic partnerships, merging and acquiring with not only other local companies, but also American companies. The local SVOD platform owns a wide range of intellectual property rights through merger and acquisitions of production studios and agreements with companies such as Naver. By distributing content through their own SVOD platform, intellectual property rights stay within the company and thus create a sustainable creative ecosystem where the profits will be used for funding content production.

However, With Netflix and other SVOD platforms such as Disney+ and Paramount starting to produce original Korean content, it raises concerns for local SVOD platforms, which result in requests of various policies to protect the local creative ecosystem and prevent others from dominating the market. The findings further shows that local production companies and SVOD platforms are trying to catch up with Netflix by adapting certain techniques, resources and production practices to prevent platform imperialism by Netflix in the local Korean market. Furthermore, although because of Netflix investing heavily and funding production costs, local creatives are able to produce certain Korean content, after the success of *Squid Game* (2021), local creators were not able to get compensation for its success due to Netflix holding the intellectual property rights. Protecting intellectual property rights is crucial in order to enhance the national economy and protect the content (Jin, 2016). Being aware of the importance of intellectual property rights, local production companies aim to find ways to extend the owned intellectual property rights in order to generate the most profit.

This study is limited in a way that among many trade press interviews available online, only fifty-three articles were selected and analyzed in-depth. Regarding the collected data, it is

limited in the way that only news articles were collected that were online publicly available at the time of collecting data, and therefore cannot account for news articles that might not exist anymore. Furthermore, trade press interviews of media industry professionals are mostly used for commercial media. Indeed, most of the interviews, Korean creatives tried to only talk about the content. Despite this, the interviews were insightful as it contained discourses on Netflix's production practices in Korean content production and gave valuable meanings about Netflix's presence in Korea and the local Korea production industry. As the main object of this analysis was Netflix, the strategies and discourse on local SVOD platforms were looked into briefly but it is encouraged to be explore it further by examining other local SVOD platforms in-depth.

Since the SVOD platform industry continues to grow, further research is needed to compare different SVOD strategies, especially production practices between other SVOD platforms in national and transnational context. Especially with the increasing presence of global SVOD platforms in the Korean media landscape, further research on the arrival of other global SVOD platforms besides Netflix should be examined as well. In addition, research on local SVOD platforms is necessary to gain more knowledge on the developments of local SVOD platforms and the possibility of these local SVOD platforms to go global. As demonstrated in this research, examining the discourse on different levels is crucial in understanding the dynamics between a global SVOD platform like Netflix and Korea, a local market with ambitious local SVOD platforms who strive to go global.

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