

The Lagged Development of the Korean *Manhwa* Industry from 1910 to the Present: The Formation of Negative Perceptions

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Abstract

In comparison to Korea's other cultural industries, *manhwa* 만화가 has shown a lagged development. As a result, the Korean government has recently shown interest in this industry and begun to support it. However, the fundamental reasons for the lagged development of *manhwa* should be carefully scrutinized in order to make promotion policies and support more effective and thus to achieve further development and advancement of the *manhwa* industry. This article seeks to address this issue and argues that the core problem is derived from a negative view toward *manhwa* as it has been considered to be harmful to Korean society and, hence, not acknowledged as a part of culture. Therefore, this paper takes a historical approach to track down how this negative view formed and why it has prevailed in Korea. To this end, political and economic changes related to the *manhwa* industry are analyzed with a focus on production and consumption. The paper reveals that it was not only coercive public policies but also a lack of production capacity that induced a distorted view toward *manhwa* and caused the development of the industry to lag. Where business strategies have been adopted in an improved business environment, this has helped to enhance production to achieve better outcomes and change the view of consumers toward *manhwa*, resulting in an increase in consumption.

Keywords

manhwa | cultural industry | cultural policy | production | consumption | *Hallyu*

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INTRODUCTION

Since the late 1990s, popular cultural content from Korea has enjoyed a strong following across East Asia and its attractiveness has expanded further to many other regions including the Americas, Europe, the Middle East, and Africa. This cultural development has come to be known as *Hallyu* 한류 or the Korean Wave. It has diversified from films, dramas, and music to include cuisine, games, and even cosmetics. In recognition of this diversification, the Korean government has shown more interest in promoting other sectors that have shown a lagged development but have some potential (Figure 1). One area of keen interest is the *manhwa* 만화 industry, whose history can be traced back to the early 1910s.¹

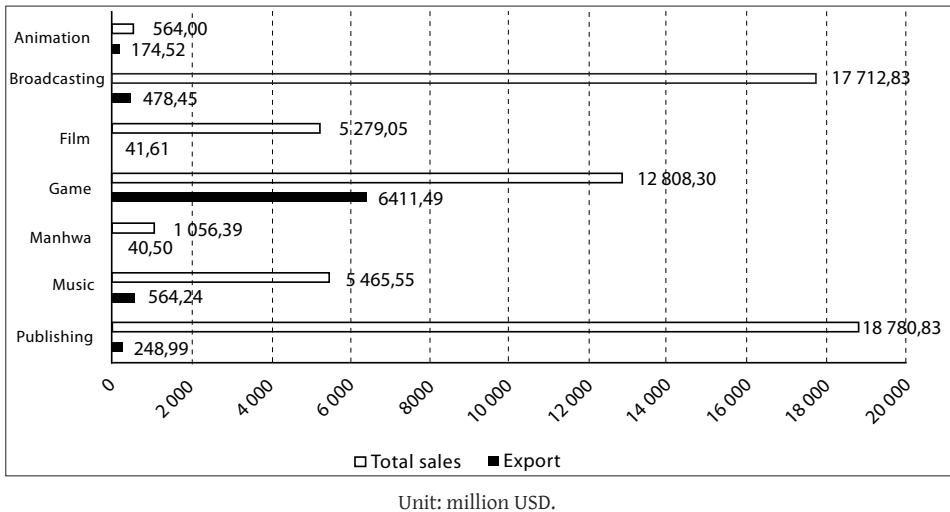


Figure 1. Performance of the main cultural industries in Korea (2018).²

¹ Comics in Chinese characters is “漫畫” or “漫画” (*manhua*). These characters are pronounced differently in each language that has adopted this word. For example, manga まんが in Japanese or *manhwa* 만화 in Korean. Over time, these terms have developed according to the specific nationality of the publication. Manga refers to Japanese publications and *manhwa* to Korean ones while the term “comics” often refers to the output of American publishers like Marvel or DC. In this paper, manga and *manhwa* are used with the aforementioned distinction of nationality. According to the Korean government, this industry is known as the “cartoon industry.” The general usage of the term “cartoon,” though, is very limited. Thus, *manhwa* industry is utilized in this paper.

² Ministry of Culture, Sports and Tourism (MCST), *K'ontench'usanŏpt'onggye* (Sejong: MCST, 2019), 3. Due to the COVID-19 pandemic, data for 2018 is utilized in order to avoid any possible distortion.

It needs to be stressed here that in Korea the term *manhwa* does not distinguish between moving images (e.g., animated films and cartoons) and non-moving images (e.g., comics and webtoons, which is a Korean term that refers to online comic strips). The border between these two has blurred recently due to technological advancement and digitization. Despite this, the Korean government clearly distinguishes between them. This paper follows this approach and focuses on *manhwa* as a kind of cultural production involving non-moving images.

As part of its support for this sector, the Korean government launched a three-phase promotion plan: the first phase was to last from 2002 to 2008, the second from 2009 to 2013, and the third from 2014 to 2018.³ The main policy tool adopted by the government in this regard was the *Manhwa* Promotion Law (Manhwajinhŭng e kwanhan pŏmnyul 만화진흥에 관한 법률) of 2012, which sought to push ahead with more assertive policies by increasing the number of subsidies.⁴ This is the first law of its kind in Korea that has a specific focus on the *manhwa* industry. Previously, the industry was regulated by the Publishing Industry Promotion Act (Ch'ulp'anmunhwasanŏp chinhŭngbŏp 출판문화산업진흥법, 1962–1988), the Act on Promotion of Periodicals (Chŏnggiganhaengmul ũi tŭngrok tŭng e kwanhan pŏmnyul 정기간행물의 등록 등에 관한 법률, 1988–2011), or other *ad hoc* policies.

The situation has not always been favorable for *manhwa*. Comprising of editorial (or sarcastic) and entertainment *manhwa*, the industry has been disregarded as a serious form of culture since its birth in Korea. Then, educational *manhwa* was only first included in the industry in 2006.⁵ This was due to its economic value, as this sector has shown significant growth led by educational

³ The characteristics of each phase are as follows: the first phase is to foster creativity, build infrastructure for production and distribution, improve awareness of *manhwa*, and improve and reform the relevant legal system; the second phase is to enhance creativity, improve distribution and marketing, and revitalize the licensing business; and the third phase is to expand the creative talent pool, establish fair distribution, and promote webtoons. For further information, see Byung Soo Kim and Won Seok Lee, “3ch'a manhwa sanŏp chungjanggi paljŏn kyehoik surip gwa chŏnmunillyŏkyangsŏng chŏngchaek,” *Cartoon & Animation Studies* 32 (2013): 189–200; Ministry of Culture, Sports and Tourism (MCST), “Manhwa sanŏp yuksŏng chungjanggi kyehoik,” [https://www.mcst.go.kr/servlets/eduport/front/upload/UplDownloadFile?pFileName=\[0528\]EB%B3%84%EC%B2%A8-%EBA7%8C%ED%99%94%EC%82%B0%EC%97%85%EC%A4%91%EC%9E%A5%EA%B8%B0%EA%B3%84%ED%9A%8D\(2014~2018\).hwp&pRealName=18B4039D15DA4150A4959D0BFD177B9C.hwp&pPath=0302000000](https://www.mcst.go.kr/servlets/eduport/front/upload/UplDownloadFile?pFileName=[0528]EB%B3%84%EC%B2%A8-%EBA7%8C%ED%99%94%EC%82%B0%EC%97%85%EC%A4%91%EC%9E%A5%EA%B8%B0%EA%B3%84%ED%9A%8D(2014~2018).hwp&pRealName=18B4039D15DA4150A4959D0BFD177B9C.hwp&pPath=0302000000) (accessed April 22, 2020).

⁴ “Promotion of Cartoons Act,” National Law Information Center, <https://www.law.go.kr/LSW/eng/engLsSc.do?menuId=2§ion=lawNm&query=11311&x=28&y=17#liBgcolor0> (accessed April 3, 2020); Kim and Lee, “3ch'a manhwa sanŏp chungjanggi paljŏn kyehoik surip gwa chŏnmunillyŏkyangsŏng chŏngchaek,” 198–200.

⁵ There are three main types of *manhwa*: editorial (or sarcastic), entertaining, and educational.

manhwa rather than the recognition of its cultural value.⁶ Webtoons were on a similar path. Although they began to emerge in the early 2000s, they were finally included in 2013 thanks to their widespread success.⁷ Looking at Figure 1, which is based on data from 2018, the *manhwa* industry shows very modest performance despite the inclusion of the strongly performing sectors, educational *manhwa* and webtoons. This provides a sense of how poorly the *manhwa* industry has performed.

For these reasons, it is hard to avoid the conclusion that these successful sectors were included under the label of the *manhwa* industry in order to boost its apparent size and to show that Korea's cultural industries are growing. Taken together, these facts raise three important questions. First, why has the Korean *manhwa* industry shown modest performance and lagged development compared to other cultural industries? Second, why has this industry not been acknowledged as a serious part of culture despite its long history? Third, how have educational *manhwa* for children and webtoons achieved their strong growth in contrast to other sectors of the same industry?

Answering these questions is critical if the competitiveness of the *manhwa* industry is to be improved, as the answers are likely to indicate how to develop more effective public policies. This paper thus seeks to address these issues by covering the following content. The first section examines the existing literature to highlight the need for the approach taken in this paper and describes briefly the methodology used in the paper. The second section analyses the disrupted development of the Korean *manhwa* industry. The third section scrutinizes the resurgent development of the industry by focusing on the evolution of production and consumption. The fourth section further discusses approaches to advance the *manhwa* industry. Finally, the last section summarizes the main implications to be drawn from this paper and highlights areas for possible future research.

In terms of its approach, this paper utilizes descriptive and qualitative data found in existing studies or based on reliable secondary sources. This is because a large number of *manhwa* and relevant data have not been well archived as *manhwa* has not been considered to be part of culture in Korea for a long period of time. Regarding the time covered by this paper, there are six distinctive periods: first, the Japanese occupation (1910–1945); second, the post-occupation

⁶ Ministry of Culture, Sports and Tourism (MCST), *K'ontench'usanöpt'onggye* (Seoul: MCST, 2011), 37, 129; Ministry of Culture, Sports and Tourism (MCST), *K'ontench'usanöpt'onggye* (Seoul: MCST, 2012), 154.

⁷ Ministry of Culture, Sports and Tourism (MCST), *K'ontench'usanöpt'onggye* (Seoul: MCST, 2013), 146, 154.

recovery from 1945 to 1950s; third, the 1960s and 1970s, which were characterized by military rule and rapid economic development; fourth, economic stabilization during the 1980s; fifth, the 1990s, characterized by liberalization and informatization; and finally, the period from the 2000s until the present. Instead of juxtaposing all the relevant details in each period, this paper focuses on the critical policy changes that have significantly affected production and consumption, contributing to negative perceptions toward *manhwa*.

THE NEGLECTED FACTOR: THE FORMATION OF NEGATIVE PERCEPTIONS TOWARD MANHWA

Only recently have scholars from various disciplines begun to pay attention to the *manhwa* industry due to its significant transition and growth.⁸ Given that *manhwa* operated under the strict censorship policies of the military government from the 1960s to the 1980s, much of the literature has focused on how much the industry suffered and the extent to which its development was hindered given the limited freedom of expression.⁹ Webtoons, by contrast, have been subject to interest due to this sector's significant growth in recent years. As such, many have focused on how this sector embraces digitization and how well it has been received by consumers around the world.¹⁰ Their contributions are meaningful for the study of *manhwa*, but a broader perspective can provide a better understanding of the delays to the industry's development and the recent growth of particular sectors such as webtoons.

When exploring the *manhwa* industry in more detail, several scholars have raised issues that have hindered its development. They state that: (i) the production of *manhwa* in Korea is weak as the market size is small; (ii) there is

⁸ Sangmin Lee and Hak-Soon Yim, "Urinara manhwa yǒngu kyǒnghyang gwa hyanghu kawje," *The Korean Society of Cartoon and Animation Studies* (Conference proceeding) (2009): 2–21.

⁹ Ki-Heon Yoon and Byoung-Soo Kim, "Hanguk ilbon ūi manhwa p'yohyǒn ūi chayū kyujūe yǒngu," *Cartoon & Animation Studies* 10 (2008): 1–13; Sang-Jung Han, "1960 nyǒndae hanguk manhwa esǒ tǔrǒnan pangongjuūi ūi myǒt kaji yangtae," *Journal of Popular Narrative* 15, no. 2 (2009): 91–113; Ji-Hye Yoon, "Hanguk pangong manhwa yǒnghwa ūi sǒnjǒn chǒnryak gwa kǔ ūimi," *The Journal of Korean Drama and Theatre* 46 (2014): 157–88.

¹⁰ Wonho Jang and Jung Eun Song, "Webtoon as a New Korean Wave in the Process of Glocalization," *Kritika Kultura* 29 (2017): 168–87; Tae-Hoon Lee, "Weptun ūi yǒnghwahwa tǔrendū e daehan yǒnghwasanǒp ūi daejungyesulsǒng punsǒkyǒngu: yǒnghwa 'sin gwa hamkke (2017) rǔl chungsim ūro," *Journal of Digital Convergence* 16, no. 5 (2018): 391–98; Brian Yecies, Jie Jack Yang, and Yiming Lu, "Korean Webtoon and Collective Innovation Expanding Europe's Creative Industries through Competitive Localization," *Innovation: The European Journal of Social Science Research* 33, vol. 4 (2020): 468–69.

no specialization in the production of quality work;¹¹ and (iii) workers receive limited wages due to over-hiring and a distorted labor market.¹² While these evaluations are meaningful, most of their findings are merely related to the production of *manhwa* and these can be considered outcome variables. For example, as the industry has not been well developed and is small, the production of *manhwa* can be weak and therefore lack specialization; hence, wages are limited. In other words, these factors are not the fundamental reasons for the lagged development of the *manhwa* industry. For instance, why is production weak? Why is there no specialization in production? Why is the labor market distorted? And why does the market remain underdeveloped and small?

In this regard, it should be noted that a number of Korean cultural industries, such as pop music, films, and dramas, were also less developed in their early stages; however, these industries have successfully emerged in the domestic and global markets.¹³ By contrast, when compared with these industries, *manhwa* existed under harsher conditions. For example, from the 1960s onwards the Korean government urged the public, especially school students, to burn *manhwa* books, a trend similar to what happened in the United States during the 1940s when comics first appeared (Figure 2).¹⁴



Figure. 2 Public burning of *manhwa* and comic books. The Seoul Metropolitan Police together with students burn *manhwa* and “substandard” books in Changchungdan Park (Changch’ungdan kongwon 장충단 공원), Seoul in 1966 (left); Catholic school students burn thousands of comic books in Binghamton, New York in 1948 (right).¹⁵

¹¹ Woo Song Bang, “Manhwa sanŏp ūi hyŏnhwangbunsŏk mit paljŏn panghyang mosaek,” *The Korea Contents Association Review* 9, no. 3 (2011): 18–22; Tae-Won Kyung, “Manhwa sanŏp ūi hyŏnhwang gwa hwalsŏnghwa pangan,” *The Korea Contents Association Review* 13, no. 2 (2015): 20–23; specialisation is a method of production whereby an entity focuses on the production of a limited scope of goods to gain a greater degree of efficiency. For instance, one creator should focus on story development while the other should focus on character development to meet widespread and sophisticated demand.

¹² Hyejin Yoon, “Do Higher Skills Result in Better Jobs? The Case of the Korean Animation Industry,” *Geoforum* 99 (2019): 267–77.

Gradually, this practice changed in the United States, which today has one of the largest markets in the world for comics. By contrast, the situation in Korea has remained stagnant, although as mentioned previously educational *manhwa* for children and webtoons have partially offset this trend in recent years.¹⁶ These contrasting situations show that the consumption of *manhwa* can be heavily influenced by the will of the government. They suggest that the stunted development of the Korean *manhwa* industry may be the result of coercive policies pursued by the government. This highlights the need to examine where such public policies originated and why and how the government later decided to become supportive, particularly toward educational *manhwa* and webtoons.

In examining these trends, it becomes clear that both production and consumption should be carefully examined since they interact closely.¹⁷ It is also important to consider the effect of public policies on the interaction between production and consumption. So far, most studies have only dealt with a specific period or historical event that has affected *manhwa* rather than looking at the wider history of the industry. To address this gap, this paper takes a historical approach to identify where such coercive policies originated and how these policies have impacted the production and consumption of *manhwa*.

¹³ Jimmyn Parc and Nobuko Kawashima, "Wrestling with or Embracing Digitization in the Music Industry: The Contrasting Business Strategies of J-Pop and K-Pop," *Kritika Kultura* 30 (2018): 26; Jimmyn Parc, Patrick A. Messerlin, and Hwy-Chang Moon, "The Secret to the Success of K-Pop: The Benefits of Well-Balanced Copyrights," in *Corporate Espionage, Geopolitics, and Diplomacy Issues in International Business*, ed. Bryan Christiansen and Fatmanur Kasarci (Hershey, PA: IGI Global, 2016), 138; Jimmyn Parc and Hwy-Chang Moon "Korean Dramas and Films: Key Factors for Their International Competitiveness," *Asian Journal of Social Science* 41, no. 2 (2013): 126–49; Jimmyn Parc, "Business Integration and its Impact on Film Industry: The Case of Korean Film Policies from the 1960s until the Present," *Business History* 63, no. 5 (2021): 850–67.

¹⁴ John A. Lent, ed. *Pulp Demons: International Dimensions of the Postwar Anti-Comics Campaign* (Madison and Teaneck: Fairleigh Dickinson University Press, 1999); Han, "1960 nyöndae hanguk manhwa esö türönan pangongjuüi üi myöt kaji yangtae," 100.

¹⁵ Left: "Citizens burning manhwa books," digital image, Open Archives, <https://archives.kdemo.or.kr/isad/view/00727306> (accessed January 2, 2022); right: "Just your typical comic book burning in Binghamton, NY.," digital image, KPCC, <https://www.kpcc.org/show/of-framp/2013-10-09/book-burning-anyone-a-look-at-las-comic-book-ban-of-1948> (accessed January 2, 2022).

¹⁶ Jong-Moon Lee, "An Analysis on the Perception of Students & Parents to Comics for Learning in Elementary Schools [haksüpmanhwa e daehan ch'odünghaksæng gwa hakbumo üi insik bunsök yöngu], *Hangukdosögwanhakhhoji* 43, no. 2 (2012): 227–46.

¹⁷ Michael E. Porter, *The Competitive Advantage of Nations* (New York: Free Press, 1990), 440–42.

DISRUPTED DEVELOPMENT OF THE MANHWA INDUSTRY

The Japanese occupation period (1910–1945): The birth of manhwa and the formation of its distorted image

It is important to mention here that knowledge on the *manhwa* produced during this specific period is limited. Still, Lee Doyŏng 이도영 is generally regarded as having become the first Korean cartoonist when his single-panel drawing on current affairs was published in a newspaper on June 2, 1909 (Figure 3). During the late period of the Korean Empire (Taehan Cheguk 대한제국, 1897–1910), *manhwa* and its satirical cartoon techniques were transferred from Western news publications to Korea through Japan.¹⁸ As a new “genre,” *manhwa* soon became popular among consumers who purchased newspapers. Shortly thereafter, the market evolved into two categories: satirical and comic *manhwa*.

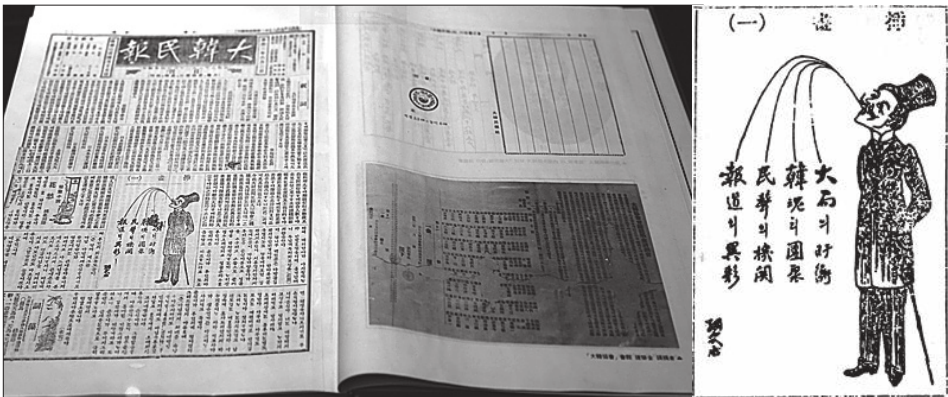


Figure 3. The first cartoon to appear in Korea.¹⁹ The front page of *Taehanminbo* 대한민보 where the first *manhwa* appeared (left); a mandate by the newspaper on the national situation, national solidarity, unanimous opinion, and diversified content (right).

Due to the growing political interference of Japan and Russia in the early twentieth century, *manhwa* satirized these countries and/or sought to arouse patriotism. Shortly thereafter, its development was hindered by the Japanese occupation of the Korean Peninsula (1910–1945) and suppression of Korean me-

¹⁸ Eun-Young Seo, “1910 nyŏndae manhwa ūi chŏngae wa naeyong jŏk tŭkjil: maeilsinbo kejae manhwa rŭl chungsim ūro,” *Cartoon & Animation Studies* 30 (2013): 139–68.

¹⁹ “Taehanminbo,” digital image, Doopedia, https://www.doopedia.co.kr/photobox/comm/community.do?_method=view&GAL_IDX=170731001070524#hedaer (accessed December 27, 2021).

dia. This went further when the Japanese Government-General of Korea announced that Japanese would be the official language in 1911 and later banned the use of the Korean language completely in 1938. Throughout its occupation, Japan devoted a lot of work to the assimilation of Korea and sought to eradicate its national identity. *Manhwa* was not considered an independent industry, but both satirical and comic cartoons appeared in the daily newspapers. The former portrayed societal and political issues in a mocking way while the latter usually featured children as the main characters and light humor.²⁰ In this environment, satirical *manhwa* became subject to control and suppression by the Japanese authorities.²¹ At the same time, those that were not subject to political control, like the comic cartoons, were considered by the general population to be childish, a perception which persists to this day in Korea.²²

During the occupation period, *manhwa* was used as a propaganda tool by the Japanese authorities, either to persuade the Korean public to support their policies or to denounce the development level of Korea and its people while emphasizing Japan's own advanced progress. For instance, Figure 4 implies that a Korean aristocrat does not know about the existence of cars (left image) or does not know how to board a tram (right image).²³ These trends continued throughout the occupation period until the liberation of Korea in 1945. Given this context, it is easy to assume that the majority of Korean consumers, particularly people from the intellectual class and former politicians, would have viewed *manhwa* negatively as a tool of propaganda during this period. This whole process formed the basis of a vicious circle in the domestic market, particularly among producers and consumers, which hindered the development of the *manhwa* industry.

²⁰ Eun-Young Seo, "1920 nyöndaе maeсhae үi taejunghwa wa manhwa: 1920 nyöndaе cho, tongailbo wa tongmyöng үi manhwa rül chungsim үro," *Journal of Popular Narrative* 18, no. 2 (2012): 134–42; Ji-Hoon Park, "Taehanhyöpheo үi taehanminbo (1909–1910) palgan gwa sisanmanhwa yönjae үi sönggyök," *The Journal of Korean Historical-Forklife* 44, no. 3 (2014): 246–48; Seo, "1910 nyöndaе manhwa үi chöngae wa naeyong jök tükjil: maeilsinbo kejae manhwa rül chungsim үro," 162–64.

²¹ Yong-Gyu Park, "Ilje malgi(1937–1945) үi öllont'ongjejöngch'aek gwa öllongujobyöndong," *Korean Journal of Journalism and Communication Studies* 46, no. 1 (2001): 194–228.

²² Jae-Dong Park, "Katün bolgöri rosö үi hoihwa wa manhwa," *The Korean Society of Cartoon and Animation Studies* (Conference proceeding) (1995):173–80; Wan-Kyung Seong, "Manhwa үi ölgul," *The Korean Society of Cartoon and Animation Studies* (Conference proceeding) (2008): 79–86.

²³ Yun-Jeong Choi, "Ilje kangjöngi i ju-hong үi manhwa yöngu," *Story & Image Telling Research Institute* 14 (2017): 446–49; Seo, "1920 nyöndaе maeсhae үi taejunghwa wa manhwa," 145; Seo, "1910 nyöndaе manhwa үi chöngae wa naeyong jök tükjil," 151–52.

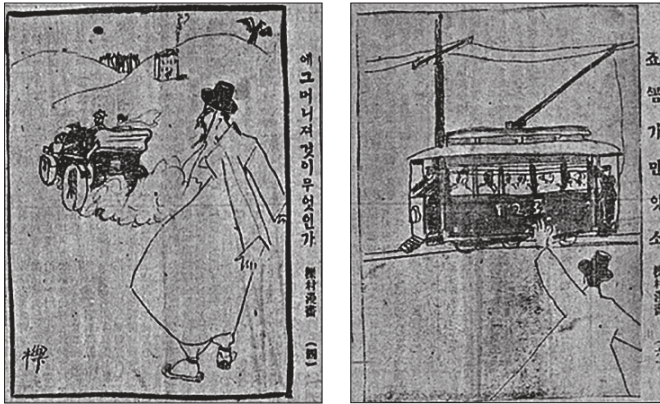


Figure 4. Examples of propaganda *manhwa*.²⁴ (Looking at a car “Gosh, what is that?” (left); (Unaware of tram stops “Hey, stop there! (right).”

Post-liberation period (1945–1950s): *Manhwa*’s growth

After Korea’s liberation from Japan in 1945, the Korean *manhwa* industry began to enjoy a boom as there was little in the way of entertainment at the time and political constraints had been released. A number of people from newspaper and publishing companies began to produce various genres and styles of *manhwa* to meet consumer demand. After 1947, *manhwa* was usually published in a sixteen-page booklet using low-quality paper due to the shortage of raw materials at that time. Known as *Ttegi* [테기], these publications became very popular among the young generation, who emerged as the main consumers, since they were cheap and easy to circulate among friends. Furthermore, between 1945 and 1950, various *manhwa* magazines for adults were also produced and vividly depicted the social situation of the time.²⁵ As both satirical and comic *manhwa* took hold, the market grew significantly until the sudden outbreak of the Korean War on June 25, 1950.

During the Korean War (1950–1953), *manhwa* was again used for propaganda purposes while losing its close association with journalism and satire.²⁶ In spite of this, its entertainment aspect developed further, although it was restricted to the Busan area which had not been captured by North Korea and where most of

²⁴ Maeilsinbo. *Propaganda manhwa*. n.d. In “Development and content,” by Eun-Young, *Cartoon & Animation Studies* 30 (2013): 151.

²⁵ Jung-Sook Baek, “Hanguk chŏnjaeng gwa manhwa,” *The Modern Bibliography Review* 7, no. 6 (2013): 557–60.

²⁶ Baek, “Hanguk chŏnjaeng gwa manhwa,” 563.

the wartime refugees congregated. During the war, *manhwa* rental shops began to appear, where young consumers could read an unlimited amount for a fixed hourly rate. Such rental shops helped to increase the size of the market quickly, and publishers had to keep up with increasing demand.

Despite the growth in the market, the development of the *manhwa* industry was limited as most publications were simply produced as single-edition booklets that did not lead to the formation of a larger and more loyal readership. This signifies that a limited number of Korean *manhwa* producers had to create a vast number of different characters and diverse stories, which naturally became a burden and led to a deterioration in quality. In such a testing environment, these booklets were soon filled with inconsistent storylines, violent content, and orthographic errors. In response, the Korean government began to regulate their content from April 1951 to improve the quality of *manhwa* by ensuring that it contained more coherent storylines, less violence, and correct orthography.²⁷ From the producer's perspective, a common way to circumvent these restrictions on content while meeting the increasing demand from publishers was to imitate and/or produce pirated versions of works from other countries. An example of this was Kim Sang-ok 김상옥 and Seo Bong-jae 서봉재 who copied the Japanese manga series *Kenya Boy* (Shōnen Keniya 少年ケニヤ) and published it in Korean as *The King of the Jungle* (Milim ũi wangja 밀림의 왕자) in 1952 (Figure 5). This is known to be the first case of piracy, and it led to a trend for plagiarizing Japanese manga.²⁸



Figure 5. The Japanese original (left) and the Korean copy (right).²⁹

²⁷ Ibid., 558.

²⁸ Ki-Joon Park, *Pakkichun ũi hanguk manhwayasa 3* (Seoul: Fandom Books, 2015); Sang-Ik Sohn, *Hanguk manhwa tongsa 2* (Seoul: Sigongsa, 1998).

²⁹ (left) “The King of the Jungle,” digital image, Tistory, <https://www.u-story.kr/960> (accessed November 19, 2021); (right) “Kenya Boy,” digital image, Amazon Japan, <https://www.amazon.co.jp> (accessed November 19, 2021).

The practice of piracy and plagiarism was able to persist in Korea due to three key drivers. First, as mentioned before, these *manhwa* producers had to satisfy demand from a growing market where Korean consumers wanted to read whole series of *manhwa* rather than single-edition comics. Second, the Japanese manga industry, by contrast, was advanced and commonly produced many long-running series. In this regard, producing many pirated versions of popular Japanese manga in Korean was the easiest way for *manhwa* publishers to generate profits. Third, Korea did not have any official diplomatic relations with Japan at the time, while Japanese cultural products were officially banned in Korea due to the negative legacy of the occupation period, thus many Korean cartoonists copied Japanese manga without any legal restrictions.³⁰

In 1954, the government launched campaigns to abolish illiteracy. The Korean *manhwa* market increased further in line with this effort and *manhwa* magazines for adults reappeared in 1956, having been discontinued during the Korean War. With the expansion of the market size coupled with the growth in *manhwa* rental shops, the business-minded distributor *Seoul Chongpan* 서울총판 was formed in 1957. It was the only distributor that covered the whole domestic market and was unique in its formation of a vertical chain across production-distribution. With improved distribution channels, more *manhwa* had to be published, which increased the number of Japanese manga that were pirated and copied in Korea. Another effect of this was that many publishers began to hire non-professional cartoonists and translators.³¹ However, as the many pirated versions of Japanese manga often contained explicit sexual content, which was secretly consumed by the young generation, negative perceptions of *manhwa* among the Korean public and the government increased.

During the 1960s and the 1970s: The dark age of manhwa and the emergence of animated films

Despite the increasingly negative public perception of *manhwa* among the older generation and the government, this industry grew considerably as the baby boomers became its main consumers and there was still little in the way of alternative entertainment. Naturally, the *manhwa* industry became a lucrative business. However, a monopoly in the *manhwa* industry emerged under the company *Hapdong Publishing* 합동출판사 (hereafter *Hapdong*), which controlled every aspect from production and distribution to sales. Since *Hapdong*

³⁰ Kukhee Choo, "Hyperbolic Nationalism: South Korea's Shadow Animation Industry," *Mechademia* 9 (2014): 144–62. In these early years, the notion of copyrights in Korea and Japan was not highly developed.

³¹ Baek, "Hanguk chŏnjaeng gwa manhwa," 561.

initially offered a large volume of diverse *manhwa* with cheaper prices to rental shops, this company was welcomed. With this strategy, it was able to absorb other competitors that struggled financially. Once *Hapdong* had obtained monopolistic power, it offered little remuneration to cartoonists and became more involved in production as it had always sought to do. Later, this company even made efforts to control the distribution of *manhwa* to rental shops by deciding upon titles and quantities. Of course, this practice adversely affected the quality of *manhwa* content, preventing it from satisfying consumers.

This monopolistic situation seemed to be challenged when *Hankookilbo* 한국일보, one of the Korean daily newspaper companies began publishing and distributing *manhwa* by using its subsidiary for children *Sonyŏnhankookilbo* 소년한국일보. In contrast to *Hapdong*, this company sought to publish and distribute *manhwa* with content considered suitable for teenagers, and it also attempted to break the monopoly, protect the rights of cartoonists, and normalize *manhwa* publishing and distribution.³² These efforts were encouraging enough to revive the *manhwa* industry, as this company had funding power and well-developed distribution channels. Unfortunately, *Sonyŏnhankookilbo* was in favor of copying and/or plagiarizing Japanese manga as well. Furthermore, instead of breaking up the monopoly in the *manhwa* market, it soon reached a share equal to that of *Hapdong* and thus became part of an oligopoly.

With growing political turmoil in Korea during the late 1950s, satirical *manhwa* began to criticize social and political compliance among the newspapers. Several cartoonists, such as Kim Seong-hwan 김성환, were fined for publishing *manhwa* that satirized the abuse of political power. Along with entertainment *manhwa*, the industry was considered a threat to public order and eventually became the subject of government control, particularly after Major-General Park Chung-hee 박정희 seized power in 1961. Under this military regime, the Korean government led campaigns against the *manhwa* cartoonists by denouncing them as morally and socially dangerous while their publishers were required to obtain official authorization to conduct their business.³³ As part

³² Se-Hyeong Park, “Hanguk ch’ulp’anmanhwa yut’ong ūi munjejŏm gwa kaesŏnbangan yŏngu,” *Cartoon & Animation Studies* 3 (1999): 358–97; Ki Heon Yoon, “60-70 nyŏndae hapdongch’ulpansa ūi manhwa chejack kwa yut’ong tokjŏmch’eje ūi munjejŏm,” *Cartoon & Animation Studies* 57 (2019): 291–309.

³³ There were various items that were censored. For example, animals were not permitted to be the main characters in *manhwa* and could not be featured with their own dialogue. Intimate or sexual scenes were also not allowed since they went against the Confucian principals that prevailed in Korean society. Furthermore, violent scenes had to be edited; swords or knives were not allowed to be depicted—instead brooms and clubs were shown. For fight scenes, fists and/or hands should not be portrayed touching the opponent’s face and any featured violent scene should not take up more than three pages. Ironically, this eliminated most of

of this endeavor, the government even urged, on occasion, the public, teaching staff, and students to burn *manhwa* books at symbolic places and schools (Figure 2).³⁴ Meanwhile, within society *manhwa* was considered to be outdated when compared with animated films.

In the 1970s, President Park wanted to further strengthen Korea's economy by emphasizing the heavy and chemical industries. In this vein, animated science fiction films began to feature more on television and in movie theatres. Around this period, the government pushed Korea toward stronger forms of anti-communism. This movement induced animated film producers to depict stories on the struggle between good and evil that reflected the broader confrontation between North and South Korea.³⁵ A few examples in this regard include *Robot Taekwön V* 로봇태권V and *Let's Run Mazinga-X* 달려라 마징가 X. These animated films achieved surprising success in the country as televisions became more available to the average family. But even these were not free from suspicions of plagiarism when compared with Japanese content such as *Mazinger Z* 마징가 Z, and *UFO Robo Grendizer* UFO 로봇그렌다이어 respectively (Figure 6).

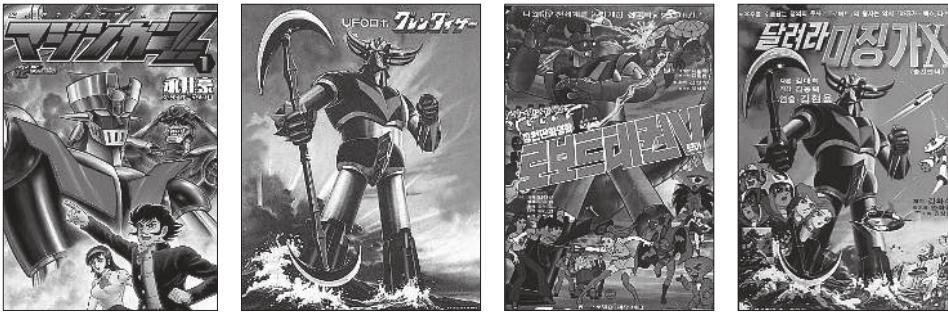


Figure 6. Comparison: Posters of Japanese animated films (the two on the left) and their Korean counterparts (the two on the right).³⁶

the *manhwa* that dealt with sports themes such as boxing and wrestling. Lastly, the government controlled the print size as well as the length; see Yoon and Kim, “A Study on Freedom Constraints,” 1; Yoon-Ki Hong, “Pakjonghong ch’ölhak yöngu: ch’ölhak gwa kwöllyök üi t’oihaengjok kyölhap,” *Critical Studies on Modern Korean History* 55 (2001): 161–213.

³⁴ Hong argues that Park Chung-hee also tried to change the mentality among the Korean people as he believed that most were not modernized, *ibid.* In many East Asian countries, burning books often symbolizes radical social, cultural, and political change. A good example is the Cultural Revolution (1966–1976) in China.

³⁵ Yoon, “Hanguk pangong manhwa yönghwa üi sönjön chönrhak gwa kü üimi,” 157–62.

³⁶ “Mazinger Z,” digital image, Pinterest, <https://www.pinterest.com> (accessed November 21, 2021); “UFO Robo Grendizer,” *idem*, “Robot Taekwön V,” *idem*, “Let’s Run Mazinga-X,” *idem*.

Like the relationship between the Japanese manga and anime industries, *manhwa* and animated films in Korea could have mutually reinforced each other and brought about synergies. Yet despite this promise, the Korean government considered *manhwa* substandard and a disruptive influence on public order. Thus, *manhwa* was discriminated against whereas animated films were positively embraced by the state as they were considered to be in line with the government's goals: strong political power and economic development. Despite the significant growth in the Korean animated film market, its industry suffered in terms of production and creativity. This induced the industry to copy Japanese products as the *manhwa* industry had done before. Furthermore, the oligopolistic situation in the *manhwa* industry made this situation worse as it brought about a number of negative side effects while the government was able to easily control the *manhwa* industry due to the small number of industrial participants. These conditions hindered the industry's development tremendously, and the consumers of *manhwa* subsequently shifted toward animated films.

RESURGENT DEVELOPMENT OF THE MANHWA INDUSTRY

During the 1980s: Renaissance of manhwa and tough times for animated films

In 1979, Park Chung-hee was assassinated, but hopes for political change were dashed after another army general, Chun Doo-hwan 전두환, seized power in a coup. His government began a process of suppressing political dissent around the country, which created strong negative feelings toward his rule and questions about his legitimacy. In order to placate such opposition, the Chun regime increased state support for museums and academies for traditional arts and funded the reconstruction of ancient palaces, tombs, temples, and other architectural sites while maintaining censorship and *ad hoc* policies.³⁷

Since the Chun administration began to believe that there had been too much investment in the heavy and chemical industries, it sought to reverse the earlier policies. In such an environment, the government began to criticize animated films for portraying “absurd” science fiction stories which were thought to provide little or no educational value.³⁸ In following these new guidelines, TV

³⁷ Michael Robinson, “Contemporary Cultural Production in South Korea: Vanishing Meta-Narratives of Nation,” in *New Korean Cinema*, ed. Chi-Yun Shin and Julian Stringer (Edinburgh: Edinburgh University Press, 2005), 23.

³⁸ In-Wook Heo, *Hangukaenimeisyönyöngghwasa* (Seoul: Shinhan Media, 2002), 77; Yoon, “Hanguk pangong manhwa yöngghwa üi sönjön chönrhak gwa kü üimi,” 181.

channels began to cancel such series of animated films.³⁹ Furthermore, due to the stagnant Korean film market, they did not have enough investment to produce animated films that could be screened at movie theatres. This approach eventually hindered the broader development of the animation industry to some extent.

While the animation industry was in decline during the 1980s, there was an opportunity for the *manhwa* industry to emerge. Given that the government did not approve of science fiction during this time, most *manhwa* had to deal with other popular topics such as romance, sports, and current affairs. This allowed a broader range of genres to be produced and helped *manhwa* in Korea to enjoy a renaissance throughout the 1980s. In contrast to the *manhwa* from the 1960s and the 1970s, animals began to appear as lead characters with their own dialogue, a development which had been prohibited before.⁴⁰ A good example in this regard is *Dooly the Little Dinosaur* (Agigongnyong Tuli 아기공룡 둘리). Crucially, these new *manhwa* publications expanded their target market by appealing not only to children but also to older generations and young women.

As *manhwa* regained its popularity, the number of rental shops began to grow again. This suggests that demand increased, as had happened in the 1950s. Furthermore, some publishers and cartoonists were able to meet such a demand condition. For example, *A Man Called God* or *Sinira Buliun Sanai* 신이라 불리운 사나이 consisted of around 140 volumes and is still in print today. Such mass production was possible due to the specialization of work. Those who were not able to achieve mass production consequently disappeared.

Throughout the 1980s, Korean consumers became more accustomed to *manhwa* that were produced in long series rather than single-edition booklets. In this environment, Korean consumers' perceptions of *manhwa* began to become more favorable. However, domestic producers were soon unable to provide an adequate supply to satisfy the growing demand. This naturally created a greater incentive to import manga from Japan that was suited to the new trends in Korea at the time. Several well-known Japanese manga series were once again imported unofficially due to the ban on Japanese cultural products (as described before), and this practice contributed toward Korean consumers becoming familiar with Japanese content. It also led the *manhwa* industry to pursue entertainment by increasing the amount of sexual and violent content.

³⁹ Ibid.

⁴⁰ Sohn, *Hanguk manhwa tongsa*.

During the 1990s: Wavering hope for manhwa

As Korea entered the 1990s, it underwent several big changes including democratization. This helped Korean society to become more liberalized in expressing various ideas and views which had been censored by previous governments.⁴¹ In this environment, the Korean *manhwa* industry was able to expand further based on its strong performance in the 1980s, in particular in *manhwa* for younger generations. Several private companies entered the market by benchmarking Japanese manga magazines such as *Shūkan Shōnen Champion* 週刊少年チャンピオン. Due to the lack of supply from Korean *manhwa*, these private companies officially imported and published popular Japanese manga such as *City Hunter* シティハンター, *Dragon Ball* ドラゴンボール, and *Slam Dunk* スラムダンク in the early 1990s. For these Korean companies, it was easier to enhance their success rate by importing and publishing well-known manga than by producing and publishing new content. As a result, the Korean *manhwa* industry became too dependent upon manga.

While the domestic market for *manhwa* expanded further with the import of Japanese manga, a vicious circle began to appear again. More Japanese manga was imported, which regardless of the quality of the work often contained popular themes of violence and sexual content, as had been the case before. Korean media outlets and older generations began to view manga and *manhwa* as educationally harmful for young people. For instance, *City Hunter* often portrays female nudity while *Dragon Ball* features a plot where a boy seeks to gain enough dragon balls to grant him his wish to obtain the underwear of girls. In response to this public outcry coupled with its efforts to prevent juvenile delinquency, the Korean government introduced the Juvenile Protection Act (Ch'ōngsōnyōn pohobōp 청소년 보호법) in 1997.⁴² The goal of this law was to preserve public peace and social order; however, due to the ambiguity in defining which *manhwa* would incur violence and lewd behavior among young people, this legislation was considered to be a form of official censorship.⁴³

To make the situation worse, at the end of 1997, Korea faced serious economic difficulties with the Asian financial crisis. The Korean *manhwa* companies had become too dependent on Japanese manga since the early 1990s, and

⁴¹ Robinson, "Contemporary Cultural Production," 27–28.

⁴² More specifically, chapter II of the 1997 act covers regulations to control content that may be harmful to juveniles; Juvenile Protection Act (1997), Chapter II Regulation of Circulation of Harmful Media Materials to Juveniles. March 9, Act No 5297, <https://www.law.go.kr/LSW//lsInfoP.do?lsiSeq=34699&chrClsCd=010203&urlMode=engLsInfoR&viewCls=engLsInfoR#0000> (accessed December 14, 2022).

⁴³ Yoon and Kim, "Hanguk ilbon ūi manhwa p'yohyōn ūi chayū kyūje yōngu," 2–4.

with a weak Korean won following the financial crisis, they had to pay more than double their expenditure to import manga. This resulted in a reduction in manga imports to Korea.⁴⁴ The crisis also increased production costs by doubling the import prices for raw materials such as pulp, ink, and other printing materials. This challenging situation induced these Korean companies to work with local *manhwa* producers who had been struggling to survive amidst the flood of Japanese manga over the preceding years.⁴⁵ Unfortunately, such *manhwa* was not popular among young people, who were more accustomed to Japanese manga. Hence, the profits of these magazines declined significantly.

Toward the end of the 1990s, President Kim Dae-jung (김대중, 1998–2003) opened up Korea's market to Japan by lifting the ban on its cultural products and recognizing their copyrights. This was significant given that Japan was the second largest entertainment market in the world after the United States. Although this placed a greater burden on the Korean *manhwa* industry to differentiate itself from Japanese manga, this turned out to be positive because the industry had to look for new talent and creativity to remain competitive. Another important policy move was Kim Dae-jung's plan known as "Cyber Korea 21" (사이버 코리아 21), an effort to enhance Korea's economic development in the near future by boosting its internet and wireless infrastructure. Due to this effort, many local *manhwa* creators began to release their work online.⁴⁶

This process of informatization, driven by the internet, changed the consumption behavior among young consumers dramatically. As consumption of *manhwa* was through computers, these consumers were less self-conscious, which helped to significantly increase the size of the market during the 2000s. In addition, not only did it mean a transition from paper to screen but also created the notion that *manhwa* can be free content. This development led to a new "type" of *manhwa*, specifically webtoons. Although, the brief heyday of the Korean *manhwa* industry nearly came to an end, these events helped to foster a new environment that has had an additional positive impact upon the *manhwa* industry.

⁴⁴ Se-Hyung Park, "Hanguk ch'ulp'anmanhwa yut'ong ūi munjejŏm gwa kaesŏnbangan yŏngu," 372.

⁴⁵ Ibid., 370–71.

⁴⁶ Inha Park, "Hanguk Tijitŏl manhwa ūi yŏksa wa paljŏnbanghyangsŏng yŏngu," *Korean Journal of Animation* 7, no. 2 (2011): 64–82.

From the 2000s until the present: The Resurgence of manhwa in a new market environment

As described before, *manhwa* has long been perceived among consumers in Korea as content suited mainly for young generations such as children and teenagers, which has hindered the expansion of the market in Korea. In recent years though, Korean companies have converted this disadvantage into an advantage. In other words, while Korean companies have continued to specialize in producing content for children, they have been able to successfully expand the market to the global level. Having acquired an enhanced creative capacity during the 1980s and 1990s, this changed environment for *manhwa* coupled with digitization helped the industry take off.

Although there have been *manhwa* that teach moral lessons for society or provide general knowledge on foreign countries and their history, the more recent educational *manhwa* for children tend to teach very specific subjects. For example, as English is the most important foreign language in Korea, *The Gramgram English Grammar Expedition* (Kraemgraem yŏngmunbŏp wŏnjŏngdae 그램그램영문법 원정대) and *Gramgram English Vocabulary Expedition* (Kraemgraem yŏngdanŏ wŏnjŏngdae 그램그램영단어 원정대) are particularly useful for children who are trying to learn and memorize English grammar and vocabulary. *The Fantasy: War of Mathematics* (P'ant'aji suhakdaejŏn 판타지 수학대전) aims to introduce and teach many mathematical concepts and formulas. *The Magic Thousand-Character Classic* (Mabŏpch'ŏnjamun 마법천자문) helps children to easily master one thousand Chinese characters, which is essential for understanding Korean literature more thoroughly (Figure 7).



Figure 7. Representative educational *manhwa*.⁴⁷

⁴⁷ “Gramgram English Grammar Expedition,” digital image, Sapyoung Publishing, <https://www.sapyoung.com/> (accessed October 31, 2021); “The Fantasy: War of Mathematics 1,” digital image, RH Korea Co., Ltd., rhk.co.kr (accessed July 12, 2019); “Magic Thousand-Character Classic,” digital image, Book21, <https://www.book21.com/> (accessed July 8, 2019).

This growth of educational *manhwa* has three important implications regarding policies, production, and the market. First, as this type of *manhwa* is for education, the government is less concerned about its content. Second, the distorted view toward *manhwa* has changed as this type of *manhwa* has proven itself to be beneficial to children. Hence, parents are willing to purchase such publications. Third, this type of *manhwa* reduces business risk because it can more easily guarantee a certain level of success for publishers. Furthermore, from the corporate perspective, the expansion of this content in terms of characters and storylines is easier than traditional *manhwa* as they must focus on the education aspect while the plot can be more open. For instance, the series *The Fantasy: War of Mathematics* is based on the myth of Atlantis while *Magic Thousand-Character Classic* takes the plot of *Journey to the West* (Xi Yóu Jì 西遊記), a well-known Chinese fantasy novel. Given these advantageous aspects, educational *manhwa* has led to a growth in exports since 2011.⁴⁸

Meanwhile since the 2000s, Korean cartoonists have actively embraced the internet, which has led to the birth of webtoons—a compound of web and cartoon. Webtoons have emerged as a trend with the prevalence of smart devices. As a result, the *manhwa* industry has separated into two distinct parts: webtoons as online content and traditional forms as printed material. With the prevalence of smart devices, accessing webtoons does not require much time or space, while there are fewer economic restrictions. Given this freedom, webtoons have become popular among young generations who frequently use the internet through mobile devices. Furthermore, several mainstream Korean web portals such as Daum 다음 and Naver 네이버 helped to facilitate easier access for consumers by creating web pages dedicated to such content.⁴⁹ This form of *manhwa* has been able to reach foreign consumers more easily than physically printed copies. In fact, webtoons have been popular across a range of other countries including China, France, Japan, and Spain.⁵⁰ All of these aspects make it easier to expand the market for webtoons.

Webtoon creators have actively embraced digital technology. Initially, webtoons were a scanned copy of printed *manhwa*, but as the technology evolved, they added animation effects that repeat simple movements on the screen. Later, they embedded sound, flash, and other effects that consumers could enjoy. Along with this, a great deal of new talent has joined this sector. *The Bongcheon-Dong Ghost* (Pongch'ōndong kwisin 봉천동 귀신) and *Ok-su Station Ghost* (Oksuyōk kwisin 옥수역 귀신), both created in 2011, are good examples in this

⁴⁸ Ministry of Culture, Sports and Tourism (MCST), “Content Industry Statistics,” 146, 154.

⁴⁹ Yoon, “Do Higher Skills Result,” 271.

⁵⁰ Yecies, et al. “Korean Webtoon,” 468–69.

regard that attracted many Korean internet users to webtoons (Figure 8).⁵¹ As they have begun to feature more creative stories, many of them have increasingly become source material for dramas and films in Korea.⁵²



Figure 8. Examples of webtoons.⁵³

THE KEYS TO FURTHER ADVANCEMENT: A BUSINESS-FRIENDLY ENVIRONMENT AND GLOBALIZATION

Facing a larger market for educational *manhwa* and webtoons, the amount of “traditional” printed *manhwa* has significantly reduced over time, particularly with the emergence of the internet. This has created concerns within the *manhwa* industry and has led to criticism of this imbalance and calls for government help. In this regard, it is meaningful to examine how Japan has synergistically developed a number of manga such as the *Gundam* *ガンダム* series in the 1980s. They were popular across multiple generations including both children and adult consumers. In particular, many other manga and animation series have been exported and gained significant international popularity. This achievement has emerged thanks to an effective market environment that emphasizes business activities with little in the way of subsidies or government intervention.⁵⁴

⁵¹ *The Bongcheon-Dong Ghost* and *The Ok-su Station Ghost* are short horror stories. These webtoons include scenes such as a ghost’s bleeding face running into viewers and a ghost’s hand jumping out of the screen, both with sound effects.

⁵² Jae-Woong Kwon and Seung Hyun Park, “Manhwa sanöp ūi paljŏn gwa chinhŭng sarye yŏngu: hanguk manhwayŏngsangjinhŭngwon ūi rimeikŭ chŏngch’aek rŭl chungsim ūro,” *Cartoon & Animation Studies* 19 (2010): 208–10.

⁵³ (left) “The Bongcheon-Dong Ghost,” digital image, Naver Webtoon, https://www.webtoons.com/en/thriller/chiller/bongcheon-dong-ghost-horang/viewer?title_no=536&episode_no=22 (accessed November 19, 2021); (right) “The Ok-su Station Ghost,” digital image, Naver Webtoon, https://www.webtoons.com/en/horang/episode/page?titleNo=2185&episodeNo=9&refererPlatform=WEB_PC (accessed November 19, 2021).

⁵⁴ Michal Dalot-Bul and Nissim Otmazgin, *The Anime Boom in the United States: Lessons for Global Creative Industries* (Cambridge and London, Harvard University Asia Center, 2017), 83.

It is often said in Korea that only children enjoy *manhwa* and animated films and that they lose interest as they get older. Yet, this assertion can be countered through several examples. For example, several animated films from Hollywood, such as *Frozen* (2013), were universally popular and enjoyed great box office success in Korea, suggesting the same could apply to *manhwa* or animated films. It is also important to recognize that the growing popularity of these animated films is due to effective business activities that seek to appeal to a wide range of consumers and to meet their varied demands and expectations. The overall lesson here is that if the Korean government wishes to boost its *manhwa* industry, then one of the tasks at the top of the list is to foster a business-friendly environment where these companies can regain their dynamism and the consumer view toward *manhwa* can become more favorable.

It is additionally important to understand that globalization and digitization play an important role too. For instance, the recent success of Korean animation series clearly demonstrates their impact despite the fact that they are only for children. They began to target young kids by providing them with educational stories in several different languages instead of only in Korean. The other key aspect is that many series were made available on YouTube, which has helped with the global diffusion of these animation series as well as the promotion of other derivative products that can be sold around the world. A few good examples are *Pororo the Little Penguin* (Pporongpporong ppororo 뽀롱뽀롱 뽀로로), *Tayo the Little Bus* (Kkomabösu t'ayo 꼬마버스 타요), and *Robocar Poli* (Roboka p'oli 로보카 폴리), as well as Pinkfong's *Baby Shark* (Agisangö 아기상어) (Figure 9). These successful examples hint at what can be achieved with the *manhwa* industry in the future.



Figure 9. Representative Korean animated TV series.⁵⁵

⁵⁵ “Pororo the Little Penguin,” digital image, ICONIX Co. Ltd., <http://www.iconix.co.kr/> (accessed July 8, 2019); “Tayo the Little Bus,” idem, “Baby Shark,” digital image, The Pinkfong Co. Ltd., <https://www.pinkfong.com/ko/> (accessed June 9, 2023), “Robocar Poli,” digital image, Roi Visual, www.roivisual.com (accessed July 9, 2019).

Under less interventionist policies, the whole industry can develop better and advance further as production interacts directly with consumption and publishers are able to offer what the market demands. However, the future transformation of the industry should not be judged by current standards. This interaction can open up unexpected opportunities, which may also change how the Korean public views *manhwa*. Eventually this will be helpful in transforming the perception of the industry.

CONCLUSION

With the expansion of *Hallyu* around the world, the Korean government has taken an interest in promoting the *manhwa* industry. Supportive policies have been introduced by successive governments. Despite such endeavors, the *manhwa* industry has shown only modest performance and lagged in development when compared with other cultural sectors. In this regard, it is important to analyze the core problem using an historical approach to introduce more effective policies that can fundamentally help boost the industry. This paper argues that the main reason for such results derives from negative perceptions formed throughout the history of the *manhwa* industry.

Due to *manhwa*'s satirical characteristics, this industry has often been subject to regulations passed by the government. Under such circumstances, the *manhwa* industry has not been able to fully develop in Korea. However, the government should understand that *manhwa* is an industry where business functions with both creativity and freedom of expression. Thus, the government should take on an advisory role, not seek to become an active participant. When governments intervene too much, the market's autoregulation mechanism of supply and demand cannot function. This was clearly demonstrated by the early stage of *manhwa*'s development in Korea. By contrast, when government intervention was relaxed during the 1980s, the industry performed better than in previous years.

It is important not to overlook the critical role of business in industry. Fundamentally, business is the core agent that takes the role of production or sup-

⁵⁶ Patrick A. Messerlin and Jimmyn Parc, "The Real Impact of Subsidies on the Film Industry (1970s–Present): Lessons from France and Korea," *Pacific Affairs* 90, no. 1 (2017): 51–75; Patrick A. Messerlin and Jimmyn Parc, "The Effect of Screen Quotas and Subsidy Regime on Cultural Industry: A Case Study of French and Korean Film Industry," *Journal of International Business and Economy* 15, no. 2 (2014): 69–70; Patrick A. Messerlin and Jimmyn Parc, "The Myth of Subsidies in the Film Industry: A Comparative Analysis of European and US Approaches," *Innovation: The European Journal of Social Science Research* 33, no. 4 (2020): 474–89.

ply. When demand grows significantly, business seeks to take advantage of this opportunity under the principle “minimum input and maximum output.” Nevertheless, minimum input does not mean that business violates fair play. When the *manhwa* market grew in the late 1950s and 1990s, inappropriate business practices were conducted such as illegal imitation and piracy, and socially and ethically inappropriate content was produced to generate easy revenues. However, these practices not only created negative perceptions of *manhwa* among consumers, but also induced severe state intervention. This became part of a vicious circle which hindered the development of the *manhwa* industry. Thus, business should avoid a myopic attitude which could continue to hinder the long-term development of the industry.

It is crucial to point out a new aspect that has made the *manhwa* industry grow through differentiation and globalization. Previously, the market’s limited focus on teenagers and children was an obstacle for the development of the industry. This is no longer the case. Business has made this market more lucrative by enhancing the educational value of *manhwa*, incorporating topics such as the English language, mathematics, and Chinese characters, as described before. Furthermore, many of these *manhwa* publications have been distributed in different languages to reach a broader audience. In other words, globalization has significantly increased the size of the market. Webtoons have expanded by following the same path.

Without analyzing the fundamental reasons behind the lagged development of the Korean *manhwa* industry, many people in the industry have argued that it is small and will require government subsidies. When the global market share of Korean *manhwa* is compared with that of the United States and Japan, subsidies might seem attractive as a way to catch up. Yet, more often than not, they have unexpected negative effects on cultural industries.⁵⁶ The full long-term effects of any potential subsidy regime for the *manhwa* industry should thus be carefully considered. In this regard, it would be more effective if efforts were undertaken to enhance the competitiveness of the industry by developing production capacity for *manhwa* in terms of quantity and quality while the government focuses on fostering a market-friendly environment with less state intervention. Ultimately, this could help further change negative perceptions of *manhwa* within society. It is very important to bear in mind that culture is not inherited but is in fact created.

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