Why, Not Kollywood? Structural Dynamics and Identity Formation Through State-Led Representation in South Korea

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Abstract

Korea's 2024 Global *Hallyu* Survey found that K-pop ranked as Korea's top image for seven years. While many global cultural industries like Bollywood derive their names from Hollywood and are genre-based, Korean popular culture evolved under a self-defined term, *Hallyu*. Though "K-pop" follows global naming patterns, the broader term *Hallyu* emerged as a state-led construct to symbolize national identity. This label symbolizes the Korean state beyond entertainment. Despite widespread global recognition, this phenomenon raises a key cultural question. Why did Korea promote its culture under a sovereign term like *Hallyu* rather than hybrid labels like Kollywood, and how this naming shaped national identity? Through a qualitative case study, it applies Wendy Griswold's Cultural Diamond framework to examine cultural objects (K-pop, K-drama), producers (entertainment agencies, state institutions), the social world (Korea's policy environment), and receivers (global audiences and diaspora communities). Stuart Hall's Representation Theory further explores how *Hallyu* operates as a strategy for constructing national identity on the global stage. Initiatives like the Ministry of Culture's K-Content strategies, *Hallyu*-focused diplomacy, and UNESCO-backed K-pop campaigns show how Korea shaped its image through cultural exports. *Hallyu* emerges not simply as entertainment but as a strategic convergence of culture and national identity, legitimized through policy and global media. By analyzing *Hallyu* through lenses of cultural structure and representational politics, the study shows how a mid-sized state institutionalizes symbolic authority through cultural branding. This contributes to discussions on how strategically mobilized culture is not only a vehicle for global recognition but central to state identity.

Keywords: Hallyu, Korean culture, soft power, national identity, cultural branding

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Introduction

Over the past three decades, global cultural industries have tended to name themselves in relation to Hollywood, whether by mimicry, adjacency, or playful portmanteau (e.g., Bollywood for Hindi cinema), indexing both genre and geo-linguistic niche (see also Anholt, 2007; Encyclopaedia Britannica, 2025). South Korea's path diverges because instead of adopting a derivative hybrid like Bollywood, Korea consolidated a sovereign umbrella label, *Hallyu* (the "Korean Wave"), and institutionalized it through state policy, public–private consortia, and cultural diplomacy.

In the 2024/2025 wave of the Global Hallyu Survey conducted by the Korean government and Korea Foundation for International Cultural Exchange [KOFICE], global respondents continued to identify K-pop as the single most representative image of Korea for eight consecutive years since 2017, underscoring how a genre inside the wave functions as the front door to the nation-brand (Ministry of Culture, Sports and Tourism [MCST], 2025). In other words, Hallyu names more than an entertainment category, performing national identity (MCST, 2025; Shim, 2006).

It performs national identity and raises a problem statement and puzzle. If most non-US industries borrow Hollywood's name to claim global legibility, why did Korea pursue Hallyu, a sovereign, umbrella signifier, rather than a Hollywood hybrid like Bollywood? What structural conditions and representational politics enabled this naming to travel, gain legitimacy, and crystallize as a vehicle of state identity? Framing Hallyu as symbolic sovereignty invites us to analyze not only export performance but the politics of naming: who names, who circulates the name, and what the name authorizes (Aronczyk, 2013; Jin, 2016).

The literature background and gap section begins by noting that scholars have richly mapped Hallyu's rise across two phases. The first phase, from the 1990s through the early 2000s, was led by TV dramas, exemplified by Winter Sonata and Dae Jang Geum. The second phase, after the mid-2000s, pivoted to idol-driven K-pop, which leveraged platforms such as YouTube, transnational fandoms, and sophisticated IP management (Jin, 2016; Kim, 2013; Shim, 2006). The term Hallyu itself entered circulation via Chinese-language media in the late 1990s. It was subsequently appropriated, reframed, and re-scaled by Korean state and quasi-state organs (Shim, 2006), signaling a crucial move from exonym to endonym and from label to brand. While research addresses export metrics, fandom practices, and creative labor, less attention has been paid to naming politics as statecraft, including how the state and industry co-produce a label that stands in for the nation across sectors and why opting for a sovereign umbrella term can be strategically superior to Hollywood-derived hybrids in a middle-power context (Aronczyk, 2013; Jin, 2016).

Methodology

This study adopts a qualitative case study design to examine Hallyu. It applies Wendy Griswold's Cultural Diamond framework and Stuart Hall's Representation Theory to analyze cultural objects, producers, the social world, and receivers, exploring how Hallyu functions as a strategy for constructing national identity. The study also considers initiatives such as the Ministry of Culture's K-Content strategies, Hallyu-focused diplomacy, and UNESCO-backed K-pop campaigns to illustrate how Korea has shaped its international cultural image.
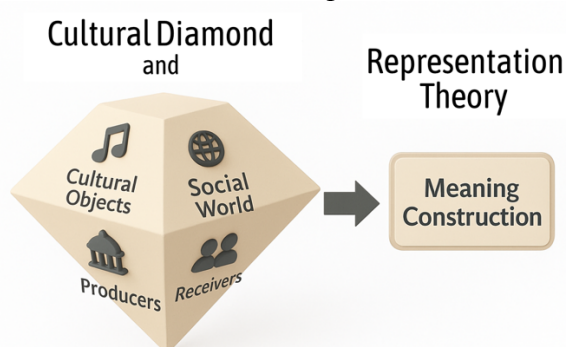
Guided by this puzzle, the study asks the following three central questions: (1) Why did Korea institutionalize a sovereign term, Hallyu, rather than adopt a Hollywood-hybrid label, such as Bollywood? (2) How did this naming shape the production, circulation, and reception of Korean popular culture as a form of national identity and soft power? (3) What structural interactions among cultural objects, producers, social worlds, and receivers stabilized Hallyu as national representation?

This paper's theoretical framework uses two complementary approaches to investigate the research questions. First, Wendy Griswold's Cultural Diamond (2013) maps relational dynamics among four vertices: cultural objects (e.g., K-pop songs, K-dramas), producers (entertainment agencies, Ministry of Culture, Sports and Tourism [MCST]/ Korea Creative Content Agency [KOCCA]/ Korea Foundation for International Cultural Exchange [KOFICE]), the social world (policy regimes; platform capitalism; trade and IP rules), and receivers (global audiences and diasporas). The diamond framework allows observation of how a label, Hallyu, stabilizes when reciprocal feedback loops among objects, producers, worlds, and receivers align. For example, agencies design globally legible idols, platforms algorithmically amplify them, policy scaffolds export and brand narratives, and fans translate that into transnational sociality.

Second, Stuart Hall's representation theory (1997) grounds how signs do political work by showing that representation is not a mirror of reality but a productive practice that constructs meaning and positions subjects. Using Hall's framework, Hallyu functions as a signifying strategy through which the Korean state and cultural industries choreograph visibility, including idols, aesthetics, and narratives, to represent the nation in global circuits. This also clarifies why Hallyu's scope exceeds any single genre because the label sutures heterogeneous cultural products into a totalizing brand of "dynamic Korea" and thereby articulates a middle-power identity that is modern, creative, and cosmopolitan (Griswold, 2013; Hall, 1997).

Figure 1
Cultural Diamond and Representation in Hallyu's National Identity

The empirical significance of this study is evident in the way the Hallyu label has been materially underwritten by policy and platform dynamics. On the policy side, the Ministry of Culture, Sports and Tourism (MCST) coordinates K-culture promotion. Agencies such as KOCCA (Korea Creative Content Agency) and KOFICE (Korean Foundation for International Cultural Exchange) produce industry statistics, support exports, organize global showcases, and run the annual Global Hallyu Survey. These activities effectively codify Hallyu as a cross-sector brand architecture (KOCCA, 2023; KOFICE/MCST, 2025). On the platform side, K-pop's globalization has been amplified by YouTube and social media logics (Jin, 2018).

Diplomatic spectaculars, such as BTS's 2021 address at the UN's SDG Moment, have positioned K-pop idols as quasi-envoys. These events conjoin pop visibility with national representation (Washington Post/Reuters, 2021). These dynamics suggest that Hallyu is not merely an entertainment trend but a state-legible cultural infrastructure that travels with metrics, institutions, and rituals of public diplomacy.

The following section provides a conceptual clarification by comparing Bollywood and Hallyu. This paper uses Bollywood heuristically as shorthand for Hollywood-hybrid naming in order to highlight contrast. In media vernacular, Bollywood ordinarily denotes the Hindi-language film industry in and around Mumbai (Encyclopaedia Britannica, 2025). In comparison, Hallyu is not confined to a language-bounded cinema but operates as a sovereign umbrella spanning music, television, film, games, fashion and beauty, and even language learning. This distinction matters theoretically because whereas Hollywood-hybrids typically label industries, Hallyu labels a nation-brand in motion that is supported by policy, public diplomacy, and multisector coordination (MCST, 2025).

Figure 2
*Empirical Trajectory: Genre to State*

The empirical point of departure for this study arises from three observed regularities. First, there is genre-to-nation slippage. External audiences routinely slide from K-pop to "Korea," signaling metonymic uptake in which a genre acts as a national sign (MCST, 2025). Second, state-led brand consolidation occurs through MCST-led strategies, with KOCCA (Korea Creative Content Agency) and KOFICE (Korean Foundation for International Cultural Exchange) as implementing arms. These strategies render Hallyu legible in policy, trade promotion, and cultural diplomacy, embedding the label into statistical and programmatic routines (KOCCA, 2023; MCST, 2025). Third, circulation through digital platforms has expanded Hallyu's reach. The post-2005 "new Hallyu" leveraged YouTube and social media to scale K-pop beyond East Asia. Formal recognitions such as Billboard's K-Pop Hot 100 (2011) have served as symbolic gateways into Western industry imaginaries (Billboard Staff, 2011; Jin, 2016, 2018; Shim, 2006).

Figure 3
Empirical Trajectory: Genre to State
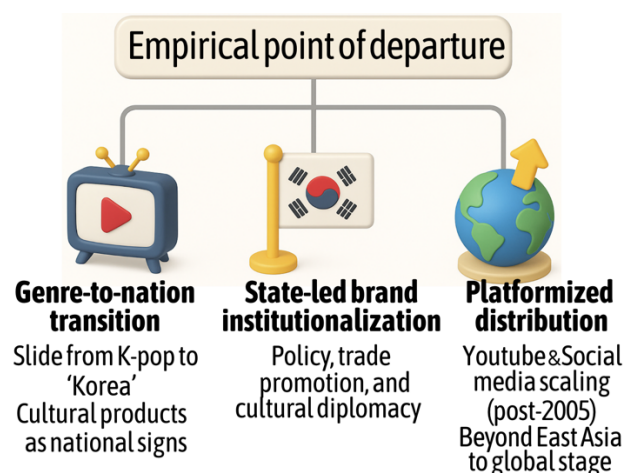
Data Collection & Key Findings

The methodological approach of this study is based on a qualitative case study that integrates three sources of evidence. The first source consists of policy and institutional texts, including press releases and strategy briefs from the Ministry of Culture, Sports and Tourism, as well as program documents and survey reports from the Korea Creative Content Agency and the Korea Foundation for International Cultural Exchange (KOCCA, 2023; MCST, 2025). Industry and platform indicators: historical milestones (e.g., Billboard's 2011 K-Pop Hot 100), trade and export analyses tied to content industries (UNCTAD, 2024). Discourse analysis: diplomatic events (e.g., UN SDG Moment address by BTS), news coverage, and global audience talk (Washington Post/Reuters, 2021). These data allow for an integrated analysis of label construction (how Hallyu is invoked and stabilized), structural dynamics (how policy and platforms align), and representational work (how objects stand in for the nation). The focus of analysis is not a single artist or show but the label Hallyu as it traverses the Cultural Diamond's vertices. The focus of analysis is not a single artist or show but the label Hallyu as it traverses the Cultural Diamond's vertices.

Figure 4
Methodological Framework: Sources and Analytical Approaches
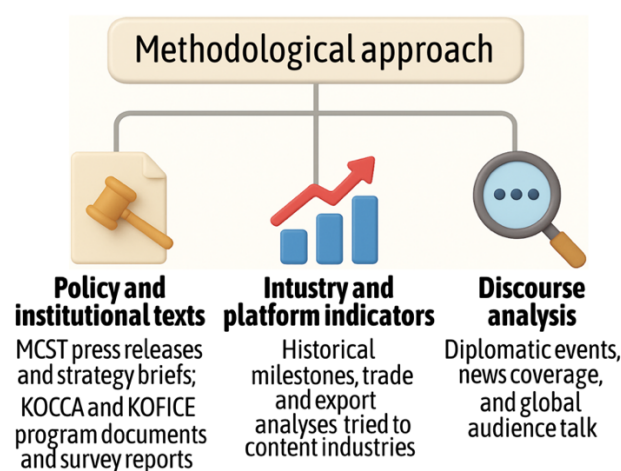
This paper makes contributions to four key scholarly conversations. First, the paper contributes to cultural policy by showing how a label that is officially supported by the government can spread into many areas. This label helps decide budgets, supports exports, and guides cultural diplomacy. This process is distinct from bottom-up genre naming. Second, it contributes to research on representation and identity by demonstrating how Hallyu performs symbolic sovereignty. This allows a middle power to claim authorship over its global cultural image rather than borrowing Hollywood's lexicon (Hall, 1997). Third, this paper contributes to media industry studies. It shows how platform affordances such as YouTube and Western recognition rituals such as Billboard charts intersect with policy to create durable global visibility (Billboard Staff, 2011; Jin, 2018). Fourth, this paper contributes to nation branding studies. It argues that branding is a relational cultural process and not only a communications campaign. In this way, the analysis aligns Griswold's structural model with Hall's theory of signification. In this way, the analysis aligns Griswold's structural model with Hall's theory of signification (Griswold, 2013; Hall, 1997; Jin, 2018).

First, this study explores the historical emergence of Hallyu. Analysis of historical sources traces the genealogy of Hallyu from its early 1990s inception through successive phases of global expansion. Research evidence reveals the naming politics surrounding the term itself, showing that "Hallyu," first coined by Chinese journalists, was later reframed by Korean state actors as a tool of cultural diplomacy. The analysis indicates a distinction between the drama-led wave of the late 1990s and early 2000s, which was anchored in titles such as Winter Sonata and Dae Jang Geum, and the post-2005 transition to a K-pop-centered "new Hallyu." Examination of these phases demonstrates that this sequence is not merely chronological but also conceptual, as it shows how the label "Hallyu" became a contested yet institutionalized signifier. Data further reveal that media industries, governments, and audiences negotiated its scope and meaning. Finally, the study reconstructs the infrastructure of circulation, showing how terrestrial broadcasting syndication, the rise of cable networks and satellite distribution, and eventually digital platforms enabled Korean cultural products to cross linguistic and regional boundaries.

In addition, this study examines K-pop as the strategic vanguard of Hallyu. Building on soft power theory, analysis investigates how K-pop functions as a bridgehead for broader cultural and economic spillovers. Empirical evidence reveals tourism flows, including fan-driven pilgrimages to filming sites and concert venues, as well as cross-industry effects, notably cosmetics, fashion, and food exports. Data further show the structural role of entertainment agencies in establishing globalized training and production systems. Updated Korean-language policy and industry sources indicate that institutions such as the Ministry of Culture, Sports and Tourism (MCST), the Korea Creative Content Agency (KOCCA), and the Korea Foundation for International Cultural Exchange (KOFICE) have leveraged K-pop as both a symbolic and material resource. In this context, analysis demonstrates that K-pop operates not only as a cultural commodity but also as an infrastructural node positioned to attract investment, negotiate with global platforms, and extend Korea's visibility within international trade regimes.

Results and Findings

This study operationalizes Stuart Hall's theory of representation to analyze how Hallyu condenses and circulates national identity. Analysis shows that Korean cultural products simultaneously project a curated image of modernity, cosmopolitanism, and tradition. Historical dramas, for example, mediate Confucian heritage, while K-pop's aesthetics signal

hyper-modernity and global belonging. Applying Hall's framework demonstrates that meaning is not fixed but continually produced through encounters between texts and audiences. The representational dynamics of Hallyu oscillate between strategic essentialism, projecting a coherent image of "Korea," and polysemic openness, allowing international audiences to inscribe their own desires onto Korean cultural forms. Findings indicate that the "Korea" signified by Hallyu is not a stable national identity but a flexible discursive construct mobilized differently across diplomatic, commercial, and fan contexts.

This study applies Wendy Griswold's Cultural Diamond as a heuristic tool to explain how the label "Hallyu" is stabilized across multiple actors. Analysis maps four key nodes. First, objects include cultural products such as K-pop, dramas, films, games, cosmetics, and language-learning content. Second, producers consist of entertainment conglomerates, governmental agencies such as MCST (Ministry of Culture, Sports and Tourism), KOCCA (Korea Creative Content Agency), and KOFICE (Korean Foundation for International Cultural Exchange), and transnational platforms. Third, receivers encompass global audiences and fandoms who actively participate in translation, subtitling, streaming, and online activism. Fourth, the social world comprises the broader political-economic environment, including trade regimes, platform logics, and cultural diplomacy. Situating Hallyu at the intersection of these four nodes demonstrates that durability emerges from recursive processes of production, consumption, circulation, and regulation.

Figure 5
The Cultural Diamond and Hallyu's National Signification
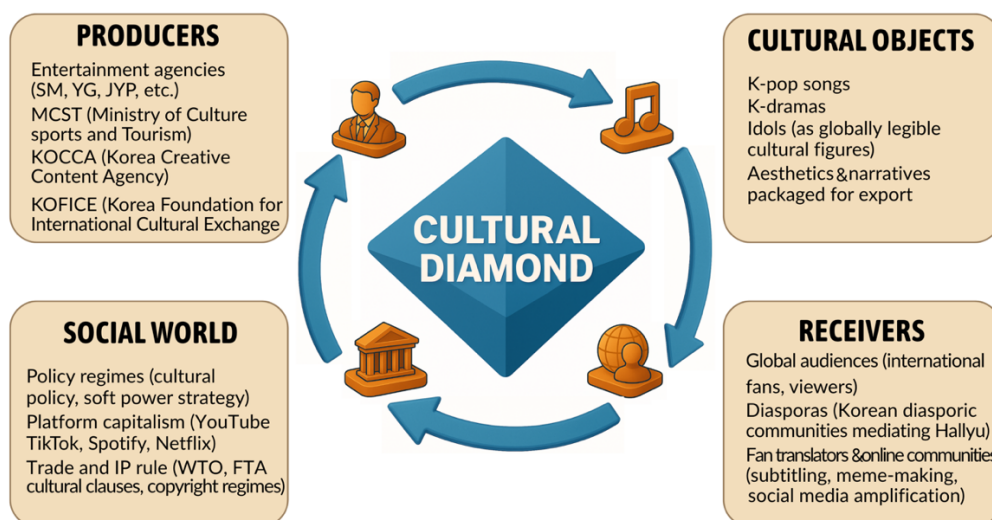
The framework by itself cannot adequately account for how Hallyu represents Korea. In this context, Stuart Hall's Representation Theory offers a complementary perspective. Representation emphasizes that meaning is not inherent in cultural products but is created through patterns of communication and interpretation. Hallyu becomes recognizable internationally not only because its products circulate but also because they signify Korea in specific ways. Korean television dramas illustrate both heritage and modernity, K-pop conveys cosmopolitan aesthetics, and campaigns supported by international organizations such as UNESCO present Korean culture as a shared global resource. These cultural products therefore function as sites where national identity is continually negotiated between producers and audiences.

By integrating the two perspectives, the analysis shows that the Cultural Diamond explains how Hallyu circulates through institutions while Representation Theory explains how it conveys Korea's national image. These frameworks indicate that Hallyu functions not as a neutral label but as a performative construction of Korea's image, sustained through coordinated structural practices and through continuous negotiation of meaning.

Implications & Conclusion

This study demonstrates how Korea's strategic use of Hallyu illustrates the interplay between cultural policy, industry practices, and global audiences in shaping national identity. The analysis shows that institutionalizing a sovereign term rather than adopting a Hollywood-derived hybrid enables coordinated management of cultural production and circulation while projecting a coherent national image abroad. In particular, examining the interactions among cultural products, producers, social environments, and audiences highlights how Hallyu becomes stabilized as a form of national representation, revealing the structural and symbolic mechanisms that sustain Korea's soft power.

Figure 6
Summary of Hallyu's Institutionalization and Impacts
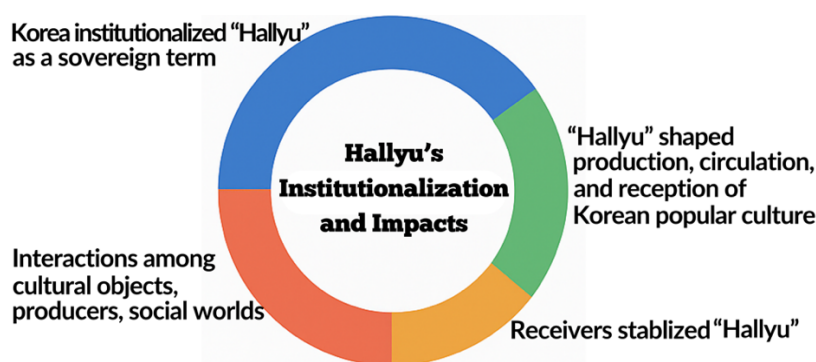
First, Korea adopted Hallyu because the label could function as symbolic sovereignty as a brand that spans multiple sectors and is legible to the state, allowing the nation to assert authorship and circulate beyond a single industrial niche. In contrast to Hollywood-hybrids, which typically designate a specific industry or cinema defined by a particular language, such as Bollywood for Hindi films, Hallyu was appropriated from an exonym to an endonym. It was then institutionalized by the state and organizations associated with government agencies as a nation-level cultural architecture (Aronczyk, 2013; Shim, 2006). This process enabled Korea to transform an emerging media trend into both a policy instrument and a nation-branding asset capable of mobilization across music, television, film, gaming, fashion, and cultural education (KOCCA, 2023; MCST, 2025).

Second, the selection of a sovereign umbrella label materially influenced production, circulation, and reception in ways that enhanced Korea's soft power. In terms of production, entertainment firms and public agencies coordinated investments and narratives so that cultural objects, including K-pop songs, K-dramas, and fashion, were designed for transnational comprehensibility. In terms of circulation, platform affordances such as YouTube and social media, along with recognition rituals like Billboard milestones, enabled these objects to reach global audiences. In terms of reception, diasporic communities and international fandoms actively translated, remixed, and performed Korean cultural signifiers within their local contexts (Griswold, 2013; Jin, 2016). Applying Stuart Hall's representation theory clarifies the

significance of these processes, showing that Hallyu serves not only to export content but also to construct meaning. It frames attributes such as modernity, creativity, and aesthetic norms as metonyms for Korea, positioning K-pop stars as de facto cultural envoys (Hall, 1997; Washington Post/Reuters, 2021).

Third, Hallyu's stabilization as a national sign emerges from ongoing interactions among the Cultural Diamond's vertices. Institutional routines and policy programs managed by the Ministry of Culture, Sports and Tourism, the Korea Creative Content Agency, and the Korea Foundation for International Cultural Exchange establish production incentives and standard measurement practices. Cultural producers create texts that are legible to global audiences. Digital platforms promote certain patterns of consumption through algorithmic amplification. Audiences, including fans, diasporas, and cultural intermediaries, actively reinterpret and circulate these meanings through translation, tourism, and commercial engagement. These processes form a continuous cycle in which institutionalization shapes platform visibility, audience engagement feeds back into cultural interpretation, and policy programs are adjusted in response. This cycle produces a durable brand architecture that generates both material effects, such as economic spillovers, tourism growth, and export linkages, and symbolic effects, including enhanced national image and international affinity (Griswold, 2013; KOCCA, 2023; UNCTAD, 2024).

This study makes three main theoretical contributions. First, it demonstrates how cultural infrastructure and representation are interconnected. By combining Griswold's Cultural Diamond with Hall's theory of representation, the study shows that structural arrangements, including institutions, markets, and platforms, interact with processes of meaning-making to shape the circulation of Hallyu. The Cultural Diamond explains how Hallyu is produced and reproduced across these structures, while Hall's framework clarifies why some circulations generate coherent national meanings (Griswold, 2013; Hall, 1997).

Second, the study introduces the concept of symbolic sovereignty. Nation-branding is reframed not merely as a rhetorical or marketing practice but as a deliberate collaboration between state and industry to claim authorship over a transnational image of the nation. This concept helps explain why a middle power like Korea invests both politically and financially in a name that extends across multiple cultural and industrial sectors (Aronczyk, 2013).

Third, the research highlights the role of platform-mediated circulation in nation-brand formation. Platform algorithms and transnational media rituals are shown to be central to the contemporary circulation of national culture. Platform affordances determine which texts gain global visibility and which aspects of national identity are amplified, illustrating how digital infrastructures shape both the scope and perception of Hallyu (Billboard Staff, 2011; Jin, 2016, 2018).

This study offers several policy and practical implications for cultural governance, industry practice, and diplomatic strategy. To begin with, state actors should sustain and diversify the cultural portfolio. Hallyu should be treated as a multi-faceted asset rather than a dependence on a single genre. Supporting independent film, games, webtoons, and regional cultural producers can reduce systemic risk from market fluctuations, political boycotts, or audience fatigue (KOCCA, 2023).

Moreover, investment in cultural labor protections and sustainability is crucial. The global success of the industry depends on the well-being of creative labor. Policies that provide

mental-health support, transparent contracts, and training programs balancing commercial pressures with ethical standards can ensure long-term creative capacity and legitimacy.

In addition, public sponsorship should be balanced with creative autonomy. State orchestration through grants, festivals, or diplomatic initiatives should avoid over-instrumentalizing culture. Programs ought to encourage experimentation and plural expressions of Korean culture that resist being reduced to a singular state narrative (Aronczyk, 2013).

Another priority is platform governance and algorithmic literacy require attention. Global visibility is shaped by digital platform dynamics, so government and industry coalitions should invest in understanding algorithms, forming data partnerships, and establishing ethical governance frameworks. This approach allows cultural value to be assessed beyond raw view counts, accounting for engagement depth, community translation work, and creative remixes.

Finally, cultural diplomacy should be embedded in multilateral venues while managing geopolitical risks. High-profile events, such as artists' participation in the United Nations, can have substantial impact but require careful calibration to prevent politicization. A diversified set of diplomatic channels, including cultural exchanges, scholarships, and collaborative productions, is likely to be more resilient than relying solely on a few spectacular initiatives (Washington Post/Reuters, 2021).

This study identifies several risks, limitations, and strategies for mitigating them within the Hallyu strategy. One key risk lies in the excessive focus on commercial profit and the production of cultural goods primarily for market demand. This focus can diminish perceived authenticity and provoke backlash when combined with brand homogenization. The preservation of independent and traditional cultural forms through targeted funding helps maintain the diversity and depth of Korea's cultural offerings.

Another challenge is the concentration risk arising from reliance on a small number of entertainment conglomerates, which centralizes both power and vulnerability. Supporting smaller producers, creators rooted in regional contexts, and collaborative production agreements between companies or countries can strengthen the creative ecosystem and reduce systemic exposure.

A further concern involves labor exploitation and reputational risk, which threaten the national brand. Incidents involving working conditions may tarnish the global image of Korean culture. Enforcing labor standards, increasing transparency in management and contracts, and establishing independent industry oversight mechanisms are crucial to protect creative labor and sustain credibility.

Finally, geopolitical vulnerability affects cultural exports. Diplomatic tensions, such as market restrictions, can disrupt circulation and reception. Diversifying international markets and promoting non-commercial forms of cultural diplomacy can reduce exposure to politically contingent disruptions and support the long-term soft power potential of Hallyu.

Figure 7
Policy Recommendations for Sustaining Hallyu

Limitations of this study stem from its qualitative, case-study design, which prioritized depth over breadth. The analysis relied on policy documents, industry reports, media events, and secondary literature. This approach provides rich interpretive insight but constrains the ability to generalize statistically. In particular, the precise quantification of economic spillovers and the causal effects of naming practices remain beyond the scope of this study.

Future research can build on these findings in several directions. First, comparative case studies could examine Korea's Hallyu alongside other nation-branding strategies such as Bollywood or Nollywood to identify when umbrella branding is effective and when industry-specific naming is more appropriate. Second, longitudinal audience research using mixed methods could trace how local audiences across different regions attach evolving meanings to Hallyu over time. Third, algorithmic and platform ethnographies could investigate how recommender systems and metadata practices shape the global circulation of cultural texts. Fourth, econometric modeling could quantify the long-term effects of Hallyu on GDP, trade, and tourism while accounting for other influencing factors. Finally, policy evaluation studies could assess which state programs including grants, festivals, and international partnerships generate measurable gains in cultural capital and support sustainable creative ecosystems.

Hallyu is best understood as a purposeful assemblage, in which the label was not merely discovered, but deliberately shaped by producers, platforms, policies, and audiences into a durable form of symbolic sovereignty. Its success stems from the coordinated interaction of institutional infrastructure and discursive practices. The Cultural Diamond illustrates the structural framework that supports Hallyu, while Representation Theory clarifies how cultural objects are transformed into national symbols through meaning-making. For mid-sized states seeking cultural influence in a platform-driven world, Hallyu provides both a model and a caution. It demonstrates how a carefully coordinated cultural strategy can enhance national visibility, while also highlighting the governance, labor, and authenticity challenges that must be addressed to maintain that visibility in an ethical and equitable manner.

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