Dynamics Between Agents in the New Webtoon Ecosystem in Korea: Responses to Waves of Transmedia and Transnationalism

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Many forces have shaped the webtoon ecosystem into what it is today. The structure constantly evolves as webtoons gain popularity in and outside Korea and the number of agents entering the production field grows. Transmedia and transnationalism are also important factors that affect the structure of the webtoon ecosystem. This article portrays the lives of agents residing in the larger structure of the webtoon ecosystem. Using Giddens' structuration and Hesmondhalgh's cultural industry as a theoretical framework, this article identifies webtoon creators, producers, and platform companies as three core agents constituting the production field. From nine in-depth interviews with agents, we aim to capture their vivid experiences based on identity and power relations. Following Giddens' duality, an interplay of agency and structure is evident. Moreover, as agents interact with one another, they also struggle for power. Because the webtoon ecosystem is greatly influenced by transmedia and transnationalism, we explore how agents are responding to structural changes created by these two waves.

Keywords: Korean webtoon, transmedia, transnationalism, agents and structure, duality, media ecosystem, cultural industry, spreadable media, webtoon production field

What is a webtoon? The word is a combination of the words *Web* and *cartoon*. These two terms separately are quite familiar and are encountered often in everyday life. Together they denote a series of

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cartoons or comics that is published on the Internet (Korea Creative Contents Agency, 2016a). Why is this simple combination of two mundane words so unique, or even unfamiliar? Moreover, how do webtoons differ from other cartoons?

First, webtoons are different from digital comics. Whereas a digital comic is a scanned and digitally web-uploaded version of a printed comic, a webtoon is digitally produced from its very origin and is intended to be uploaded, circulated, and consumed online. It follows the traits of television dramas and newspaper comic strips in that it is uploaded regularly (usually weekly), but interactions between authors and readers are much more spontaneous and direct in the online environment. In addition, a webtoon is distinguishable from a webcomic in terms of content. Although webcomics similarly aim to be published on the Web, a webtoon is essentially different in that the targeted period of serial publication is usually longer and thus requires a longer narrative. Tailored to the size of the digital screen, webtoon episodes take advantage of readers' vertical scroll activity. The industry is primarily centered on the mobile mediascape as Internet access via smartphones becomes increasingly prominent and prevalent.

The webtoon is a uniquely Korean phenomenon as a cultural product that stemmed from Korea's Internet culture on native Korean platforms. Indeed, the unique service model of providing and circulating webtoons originated from Korea. When encountering the word *webtoon*, one may simply think of Korean comics that are uploaded on Korean Internet platforms. Even in Wikipedia, webtoons are defined as Internet cartoons that are uploaded on the Internet in Korea (Chung, 2016). Witnessing the market potential of webtoons and the profitability of the service model, Korea's Internet platform companies and new webtoon service providers are turning to the global markets of Southeast Asia, Japan, and the United States (Korea Creative Contents Agency, 2016b). Korean webtoons have achieved success in foreign markets, and annual revenue for 2015 is expected to be about $92 million (Korea Creative Contents Agency, 2016a). In an attempt to break away from cultural boundaries, webtoon providers are incorporating glocalization strategies, such as fostering local cartoonists who can reflect their own cultural connotations rather than merely translating Korean into local languages. Apart from exporting Korean content, the webtoon industry is exploring ways to export webtoon service platforms, comic artist management systems, and cinematized versions of existing webtoons.

Transmedia and Transnational Waves of Webtoon

The webtoon presents an outstanding example of hybrid and convergence culture in this digital and global era in the sense that it is a cultural form embodying a transmedia phenomenon and a transnational media environment. The term *transmedia*, introduced by Jenkins (2006), is widely applicable to various phenomena. From a media production standpoint, a transmedia production delivers a similar story across different media. Transmedia is a safe tool to build an entertainment brand that attracts global audiences for television and film producers (Bernardo, 2014). Yet transmedia refers to more than a screen adaptation. In transmedia, there is one narrative world from which spin variations of stories and forms. For instance, the megahit Korean movie *Along With The Gods: The Two Worlds* (2017) was based on a popular webtoon, but it was initially criticized for digressing too far from the original webtoon. Meanwhile, webtoons are in the midst of the transnational phenomenon as appropriated versions of webtoons are exported to various countries. For example, Lezhin Comics, a Korean webtoon platform, was reported to be ranked among the

highest grossing mobile applications on U.S. Google Play in the first quarter of 2018, outpacing Marvel and DC Comics (Babeltop, 2018). Webtoons today are at the crossroads of transmedia and transnationalism.

It is the intersection of webtoons' transmedia and transnational traits in the new mediascape that this article investigates. New methods of production, circulation, and consumption create a new ecosystem with new agents and power dynamics. Our objectives are to introduce Korean webtoons and their significance in today's culture industry and then analyze the dynamic among agents in the webtoon production field. We explore how agents are responding to and being influenced by the two most important factors impacting the ecosystem: transmedia and transnationalism. Although many agents operate in the field, such as advertising companies and management agencies, we focus on three core agents: webtoon creators, producers, and platform companies. Webtoon creators are the artists who debut and sign contracts through a new process that is different from the traditional apprentice system.[3] Producers are employed by platform companies to recruit and manage creators and plan new projects. Various platform companies have emerged, from either mergers or business expansions from preexisting Web service companies.

The Structure Versus Agents in the Webtoon Ecosystem

In illustrating the power relations in the new media ecosystem, the term *agent* helps depict how various participants are influenced by the structures and vice versa. Such a phenomenon is what Giddens (1984) acknowledged as the duality of structure. In advancing the idea of duality, Giddens stressed that structural properties of social systems exist only when social practices are reproduced by social actors through routinization of processes. Hence, structural properties become both the medium and outcome of agents' everyday practices, and structures are internalized to the individuals while both constraining and enabling them. Giddens' theorization of the co-constitutive relationship between individual agency and organizational structure has been an important framework for understanding cultural production processes, especially in settings where routinized rituals are essential, such as newsrooms (Ryfe, 2009; Usher, 2012).

Following Giddens' duality of structures, this article neither attempts to create a dichotomy between structures and agents nor assesses how one overpowers the other. Rather, we meticulously portray the interplay between the structures and agents, focusing on how they influence each other in the context of transmedia and transnationalism. The introduction of a new technology can create new routines, giving latitude to agents to change the structure (Usher, 2012). Moreover, according to Giddens, agents have knowledge of their practices that allows them to tacitly act in contexts of social life as well as reflexivity. As further explained below, since agents have knowledge and reflexivity, they set the rules to govern and monitor themselves and expect others to do the same. This allows us to capture the power dynamics among the agents as they understand, enforce, and restrain the rules that apply to them.

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[3] It can be controversial to refer to webtoon creators as artists, because they might be driven by financial objectives rather than the desire to create artistic pieces. However, most of the creators interviewed for this research consider themselves as having double identities as artist and laborer. They produce webtoons for money, to be sure, but, at the same time, they regard themselves more like film directors than factory workers. We do not intend to create a narrow definition of artists here but rather borrow their own definition of their role. We use the terms *creator* and *artist* interchangeably depending on the context.

Beyond the framework of structuration, the political economy of cultural industries and the notion of the creative worker set important theoretical foundations for mapping the webtoon industry. Hesmondhalgh (2012) points out that creativity has become the main mechanism of cultural industries. When creativity becomes an important source of value in a capitalist society, then the economization of creativity is inevitable. Hence, securing aesthetic autonomy and professional autonomyis important in cultural industries. Because the cultural producers as individuals become part of the collective production process, they are assigned the roles of knowledge workers in the social division of labor, thus occupying a class position within the cultural producers.

A fairly complex process of debate is necessary to properly grasp and understand the relative power, privilege, status, and interests of the cultural producers (Hesmondhalgh & Baker, 2011). Creative laborers struggle to secure aesthetic autonomy and professional autonomy in labor processes, and this creates tension in the cultural production process. As a result, the creative industry is the area where the workers' desire to demonstrate their creativity, fulfill industrial goals, and meet sociocultural needs are combined (Hesmondhalgh & Baker, 2013). Webtoon artists, as creative laborers, know fully well that they are a part of the economic system of a cultural industry and that their products are commercial goods while not discarding their identity as artists.

This article is divided into two parts. The first part describes the overall webtoon ecosystem, briefly outlining the history of Korean webtoons to show how the webtoon industry has expanded and how its production structure has developed along with the birth of Web portal platforms. The second part examines the agents in terms of their identity, roles, and power relations. We discuss two important factors that affect an agent's identity and power dynamics: transmedia and transnationalism. To explore these topics, we conducted nine in-depth interviews with agents. Capturing the agents' liveliness in the field, this article contributes to a comprehensive understanding of the webtoon ecosystem and its changes in responding to the waves of transmedia and transnationalism.

The Historical Context of Korean Webtoons: Industry, Culture, and New Media Environment

The Advent of the Webtoon and Its Embryonic Phase:
From the Late 1990s to the Early 2000s

The history of webtoons begins in the 1990s. Like other forms of Korean popular culture, the emergence of the webtoon lies in the neoliberal ideologies that prevailed in Korea during 1990s and the nation-state's intervention in creating a global popular culture that could be exported (Jin, 2014). Quite similar to the government-driven business of *hallyu* (the Korean Wave), webtoons were originally introduced by the Korean government's plan to modernize the Korean economy to the stage of digitalization and informatization, with the help of information and communication technologies (Park, 2015. Whereas the traditional, paper-based comic industry faced severe struggles due to the International Monetary Fund crisis in 1997 and increases in imports of Japanese anime during 1998, Internet-based comics enjoyed a new possibility facilitated by open space, easy access, and high Internet speed (Yoon, Jung, Choi, & Choi, 2015)— all of which profoundly impacted the structure of production. In other words, technological developments,

economic crisis, government policies, and (inter)cultural factors led to the decline of the paper-based comic industry and the rise of the webtoon ecosystem.

For webtoon creators, the open space of the Internet provided an alternative to the traditional master-apprentice system of the comic artist ecology and allowed amateur artists to publicly debut their work (Yoon et al., 2015). Additionally, the digitalization of comics necessitated the comic industry's embrace of a new profit structure that does not rely on subscription fees or book sales, because online comics could be replicated numerous times and could be distributed in many different forms across and beyond its platform.

The Prosperity of Webtoon and Portal Sites: From 2003 to the Mid-2000s

The embryonic stage of webtoons was quite different from today's webtoon industry in terms of production, circulation, and consumption. But even in the early stage, webtoons underwent an important shift in 2003. With the Web portal Daum as the forerunner, major portal sites started to provide webtoon service on their platforms. Daum continued to publish on its network an already popular series by a famous comic artist, KangPool. In 2005, Naver, Korea's current number one portal site in terms of market share, officially launched a webtoon division as a part of its business.

Indeed, the early 2000s mark the turning point in the success of webtoons, with essential changes in their narratives and means of access and optimism about the possibilities for marketization and commercialization (Chung, 2016; Korea Creative Contents Agency, 2016b; Park, 2015). Moreover, with powerful portal sites such as Daum and Naver regularly providing and updating webtoons on their platforms, the publication of webtoons changed from a personal space to a public space. Whereas early webtoons were mostly uploaded in the personal Web pages of their creators, the webtoon services at major portal sites became a public sphere for webtoons, allowing more convenient access to general Internet users who were not avid fans of specific creators.

New Technology and New Platforms in the Smartphone Era: From 2010 to Today

Whereas the early 2000s was a period that showed the numerous possibilities of webtoons as an entertainment industry, the 2010s saw the position of webtoons as a leading industry solidify alongside the development of technology. Smartphones were a significant game changer in the circulation and consumption of webtoons. As users turned away from accessing webtoons via computer and turned instead to their smartphones, consumption of webtoons experienced an exponential increase. The number of new webtoon releases increased dramatically after 2010, with a 62.2% increase over 2009, which is the estimated year that smartphones became widespread in Korea (Yoon et al., 2015). In 2014, the webtoon field saw another jump as the number of users (on Daum and Naver) was estimated at 6 million (Korea Creative Contents Agency, 2015). The shift in how people accessed webtoons—from personal computers to smartphones—led to a change in revenue structure. Because users now consumed webtoons via their smartphones, platforms could no longer rely solely on revenues from selling advertising space; this type of commercial model does not fit the smartphone interface because there is no separate screen space for ads.

Acknowledging new methods of the marketization of webtoons, other platforms started to join the webtoon industry around 2012. Internet platforms that focused solely on providing webtoons were launched, such as Lezhin Comics and KakaoPage. Because the Lezhin Comics platform is not subject to ratings regulations, it positioned itself as the first platform to provide "adult webtoons," which are essentially R-rated webtoons that deal with sexual and/or violent topics. KakaoPage is a smartphone application that is based on the messenger application KakaoTalk. With the help of KakaoTalk's market power, KakaoPage successfully became a leading webtoon service provider and extended to other areas such as Web drama and Web novel, expanding its market to transmedia contents.

Understanding the ecosystem of the webtoon involves an examination of webtoon creators and users and the various economic and cultural intermediaries who intend to collect the values and meanings of such creations. These new relations are based on a new media environment. Particularly, the new media environment, in which content spreads rapidly over territorial and cultural boundaries, has created a more participatory and complex mixed model of content creation from different cultures and different genres (Jenkins, Ford, & Green, 2013). Yet no concrete formula exists for determining which media contents will become "spreadable." While Jenkins suggested the term *spreadable media*, Lotz (2015) describes the entertainment-based media industry as different from most other business sectors, often in frustrating ways for practitioners because of the audience's fickleness that prevents effective prediction: "I suspect the 'nobody knows' maxim is likely to be true of the circulation of spreadable media" (Lotz, 2015, para. 3). This structure of "nobody knows" becomes a crucial factor for the webtoon industry, creating both anxiety and hope among agents in the webtoon field.

The Korean Webtoon Ecosystem's Flow and Expansion

Webtoon-specialized platforms, or the so-called second wave webtoon platforms, have recently begun offering their services overseas. Comico (Comico.jp) opened in Japan in 2013, and Line Webtoon (webtoons.com) launched Japanese, English, and Chinese services in 2014. Since then, Line Webtoon has launched services in Indonesia and Thailand. Lezhin Comics has also expanded its global services steadily since 2013. As of September 2017, it had 120 Korean webtoons on the Japanese platform and 150 on the United States' professional and global webtoon platforms, including TopToon (toptoon.com) and the KakaoPage (picoma.co/web)—taking advantage of the mobile and digital media environment to publish the webtoons and find local creators.

The global expansion of Korean webtoon platforms propels changes in comics and cartoon industries worldwide. Typical forms of publication—for example, one episode per week, 70 cuts per episode, and 30 episodes per title—are very new to most markets. Some say the general forms of webtoon publication cannot succeed in certain countries due to sociocultural differences, while some find them very interesting and compelling. It may be too early to declare that Korean webtoons have restructured the ecosystems of other countries' digital cultural products. Meanwhile, transmedia conversions help readers more actively participate in the field as respondents and potential creators. Transmedia conversion is a way to expand and adapt an original story to reach various media and platforms (Seo, 2015). For example, *Incomplete Life* (*Misaeng*, 2014) and *Cheese in the Trap* (2016) are television dramas based on famous Korean webtoons that are reaching wider television audiences. Such appropriation works at the global level as well. In the

film industry, the Marvel series urges audiences to "study" all the heroes and their relationships to one another to grasp the whole Marvel cinematic universe (Ritchter, 2016). This makes people more loyal, but loyalty happens only when they become more active in the process of transmedia.

Agents in the Production Field: Identity and Power Relations

A total of nine formal interviews were conducted for this study: with four webtoon creators, four producers from different companies, and the chief executive officer of Korea's major webtoon service provider. The four producers—referred to in this article as A, B, C, and D—are employees of webtoon platform companies. Two of the creators—E and F—were at the time of the interviews publishing works on a weekly basis; G had previous experience but was not actively working; and H had not yet officially debuted but was working as an assistant to established creators. Because the interviews, particularly with producers, sometimes contained sensitive issues, the names of the platform companies are anonymized. The chief executive officer we interviewed is referred to as Z. The interviews were semistructured and ranged from one to two hours. All interviews were recorded and later transcribed for analysis.

Who Are They, and What Do They Do?

The producer is a relatively new and composite position that has developed with the changing webtoon ecosystem. The term *webtoon producer* was adopted from the field of television production, denoting producer and director. However, unlike directors, webtoon producers do not have ultimate control, and their roles are not akin to those of television producers. The role of the producer can generally be seen as comprising two main functions. First, the producer plans future works, a task that involves suggesting new topics and themes to publish and recruiting new creators. Producers judge individually submitted works by creators and select those that seem to have potential to be published online serially. They also actively search for new creators to recruit and contact them to suggest contracts.

The second role of producers is managing creators and their work. Because webtoons are generally uploaded weekly, producers are responsible for managing creators and constantly keeping in touch so that the creators are not late with their submissions. Producer B went so far as to define the role as "a service job" where producers provide "mental care service." Another task is managing the quality of webtoons, which producer A described as the most important job of a producer and typically involves offering feedback to the creators. In managing creators and contents, the producer acts as a mediator between the creators and the audience. Producers sometimes read user comments and convey general audience reactions to the creators. Some creators stated that they prefer that producers read the comments because they do not wish to read them themselves.[4]

The vast range of producers' roles suggests their mobile identity. Because it is a relatively new job, producers' tasks are not clear-cut, and there is a shortage of producers throughout the industry. Even creators, such as E, were confused about which producer to turn to when asking for help. The wide spectrum of producers' backgrounds leads to some confusion as they linger among various identities—as editors of

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[4] Most webtoon provider sites have rooms for audience and reader comments, complaints, praise, and debates. Sometimes audiences post such harsh criticisms that creators prefer not to read them.

publishing houses, directors or producers of video productions, or a completely new position. The producers mostly compare their job to editors; yet they constantly point out the differences. Producer C stated, "Yes, webtoon PDs [producers] work in a similar logic to that of the publishing house editors, but it is different." Differences include how producers must be responsive to cultural trends, have a larger number of creators to manage, and work to expand intellectual property. Still, many had experiences as editors or relevant educational backgrounds.

Mobility in producers' identity and their differing backgrounds influence the process of giving feedback to creators; some feedback is from an editor-type point of view and relates mostly to narrative; other types of feedback are from a comic artist's point of view and relate to drawing style. Due to this liquid identity, producers struggle in accumulating knowledge about the webtoon field. All producers expressed that, despite their experience working as a producer, they still cannot tell which webtoon will succeed in the market and they do not understand the rules of success. Experiences in the fields of book publishing and marketing did not mitigate their confusion. Producer D mentioned that it is neither the quality of the narrative nor of the drawing that is key to the popularity of a webtoon; D only vaguely said that "fun" is the determining factor. As the webtoon industry expands, readers' responses seem to become even more unpredictable, making it harder for producers to corroborate their role with their previous knowledge. This is precisely what Lotz (2015) means by the spreadable media's "nobody knows" maxim. It is almost impossible to make and anticipate "a formula for producing creative content likely to catch the cultural fancy of any particular audience" (Lotz, 2015, para. 3). She suggests intentional overproduction and the production of sequels as primary strategies for dealing with the uncertainty. Most webtoon platforms know this, and these strategies sometimes require producers to work even harder because they have to keep getting involved in creators' works to deal with the uncertainties of creative cultural products.

Whereas the producer is an emerging position, webtoon creators appear to have a stable identity. Although older-generation or former comic artists may have had some difficulty adopting new technology, their identity as creators remains solid. When asked about how she identifies herself, creator E clearly expressed that she is an "artist who draws and tells stories" and that she would have become a paper-based comic artist had she been born in that era. Others identify themselves either as a cartoonist or as a storyteller who pursues creativity and originality. The strong sense of identity among creators was reflected in their works, particularly in the topics they choose. Based on her previous experience as a nurse, E's work is about working in a hospital, whereas creator G's work reflects her love of video games and shares episodes about gameplay. Moreover, their educational background suggests an artist identity, as the creators mostly received professional training in animation or digital imaging in educational institutions. In fact, having a strong and solid identity was regarded as the essence of creators. All pointed out that creators should have strong characteristic and thematic focus. Because those creators are more desired by the industry, some creators try to individually establish their reputation by uploading works on social media.

Simultaneously, webtoon creators show great adaptability to the new webtoon ecosystem, demonstrating their ability to assert agency within the industry structure. Even though they have a strong sense of identity as artistic creators, they acknowledge that ultimately they are laborers trying to make a living. E still works as a part-time nurse to augment the irregular hours as a webtoon creator. When creators need to earn money, they adopt various coping mechanisms. Creator H, who had not yet officially debuted,

commented: "I try to separate myself when working as an outsourced worker who meets every demand from my employer. That is another me, not when I put my pen name up front and draw my work. That's more comfortable." Unlike the apprentice system of paper-based comics, webtoon creators, such as F, adopt and develop new routines to be affiliated with multiple companies at the same time. New digital media technology is essential in creators' purposive agency, and they understand the importance of mastering digital technology. They enroll in extracurricular education and purchase state-of-the-art devices when necessary. They have ample information about the digitalized the webtoon industry before their formal debuts. They seek tactics and advice from senior creators about how to build relationships with producers after their debut, how to deal with physical and psychological stress, and how to successfully write contracts. Their actions are shaped by the unpredictable webtoon structure, but at the same time, they are changing the structure through their own ways of coping.

Platform companies naturally emerged as a powerful agent as the webtoon ecosystem experienced a digital turn. As a renowned CEO, interviewee Z acknowledges that the webtoon industry fortuitously expanded with the Internet boom. Platform companies' power acquisition has much to do with their technological affordances. Spatially, they accumulate power by mediating creators and the audience (Kleis Nielsen & Ganter, 2018). Moreover, platforms create their own unique temporal logics to control creators and the audience's time (Fuchs, 2014; Kaun & Stiernstedt, 2014). Platforms serialize webtoons on weekly basis, and this creates a whole new temporality. For instance, if a webtoon is updated every Wednesday, the creators have to meet the deadline because the audience anticipates content upload on that day. Ultimately, the platforms' technological affordances restructure the creators' and users' experiences.

Platforms display and curate webtoons as if readers are subscribing to a weekly magazine. This unique political economic structure particularly poses limitations to agents such as the creators. Like the word *platform* connotes, these spaces seem to provide open, neutral, egalitarian and nonelitist arenas where creators can fairly compete to win debut (Gillespie, 2010), particularly within the amateur leagues. Yet creator E explained that a certain logic exists behind the weekly curation of webtoons, so having the opportunity to debut may not necessarily depend on quality. Additionally, platforms perform audience research (Andrejevic, 2002), which provides lucrative ground for attempts for transmedia and transnationalism. Although the interpretation of user tendencies varies among platforms, Z has a precise understanding of them through audience data. Z, as well as the producers we interviewed, mentioned that webtoons need to first verify marketability in Korea in order to be exported. The platform's role is to channel the audience's interests into transmedia production or global export.

Dynamics and Power Relations Among Agents

In reality, power relations are neither visible nor consistent. Yet a dynamic interplay among agents was evident from our interviews. All interviewees acknowledged that the webtoon creator is crucial in the production field: the creator is not only an important source of value but also a force that can bring tremendous changes to the webtoon ecosystem. Z points out that the webtoon industry was able to take its current form because the star creators were born:

> It is more of a Big Bang in the webtoon industry through the birth of one genius creator,
> such as KangPool, than gradual industrial expansion. KangPool was so powerful. Whenever
> he updated his series the whole Internet server went unstable.

Even as the industry solidifies, creator F notes, "There is a mascot to every platform. If one famous creator migrates to a new platform, it becomes huge news because it brings in a lot of new users."

Creators sit in the center of the dynamic, but their relationships with the platform companies are not always amicable. Creator H defines the relationship as a tug-of-war. She says, "[Creators and platforms] move forward together, constantly. But it is not together peacefully but with constant clash." This clash is interesting because it reveals their ambivalent relationship. On the one hand, creators expressed that they clearly benefit from platforms. G stated that she is "grateful" because the platform "tries to pay me at least $50 a month. That did not exist before." Although her series ended few years ago, she still receives a royalty fee. H, who is still a trainee and works as a freelancer, acknowledges that to raise her wage, she would have to debut. Platform companies provide opportunities and benefits to creators, and creators realize that this is a valuable opportunity. Z also acknowledges that the webtoon industry turns to the paid readership to protect creators and provide an environment where they can freely create innovative works.

Nonetheless, creators also expressed discontent with the system. Problems mentioned included unfair income, excessive workload, strict policies on late submission, and required modifications of their contents to meet the platform's demand. Usually, the creators compromise by sacrificing quality. G explicitly states that she "gave up on quality." And F states:

> It is important during work that I maintain my humanity, and that requires compromise.
> How I do this? I use this program that allows me to copy and paste background drawings.
> I cannot afford an assistant and the platform will not pay me, so I just use ready-made
> sources. . . . Before debuting, my artistic universe was all that mattered but now, let's
> say I gained how to do tug-of-war between myself and reality.

Platforms might require around 80 cuts per week, which creators find to be a very demanding workload. Furthermore, meeting the deadline is more important than quality, because tardiness directly impacts their income. Creator H mentioned that she is deliberately delaying her debut because she feels a "sense of shame" in balancing the platform's demands with her artistic pursuit. She says, "Even if my work is more suitable for black-and-white, I have to color it if the platform requires colored work. I feel shame or disheartened."

As they struggle in making dispiriting compromises, creators still try to claim agency. Although they may compromise, creators hold the authority to make the final decision in their work. Since they have rights to their intellectual property, all business must go through them, especially when the platform company is trying to expand intellectual property. By asserting a solid identity as the creators and owners of their work, creators attempt to claim their power in this tug-of-war. In doing so, creators demonstrate a great amount of knowledgeability and adaptability. Knowledgeability allows them to adapt to and modify the structure. Particularly when major platforms act as digital intermediaries that restructure the media

environment and create asymmetrical power relations (Nielsen & Ganter, 2018), agents construe tactics to fight against platform strategies. Tactics are a way for individuals to regain control of their agency and build a stronger community (Lingel, 2017). Over the past years, creators have gained a depth of knowledge regarding the webtoon ecosystem. Born during the hype of webtoons and having witnessed the new debut process such as amateur league, creators are the "webtoon generation." Moreover, creators learned about the irrationality of platform companies from their seniors and from sharing with their coworkers. Then they attempt to break the routine by passing on their knowledge: "I tell my school's freshmen about what companies to avoid. I got help so I try to give help," says F. In their day-to-day enactment of social life, while they reproduce structure, creators also strive to make structural changes and produce new rules.

Having been avid readers of webtoons before debuting, creators are highly adaptable to the traits of each platform. All platforms have different preferences. Creators who debuted acknowledge that their platforms suited their work in terms of the company's target markets. Creator E stresses the importance of tactical positioning:

> You cannot just draw, but from the planning, you have to choose a platform and plan your work. . . . Actually, you have to carve out yourself to fit into one platform. Either you fit yourself into the platform, or make it want you.

E has an exact understanding of each platform's characteristics, whereas H similarly understands that the genre of his work is not favored by any platforms. Producer C notes that, whereas the former creators simply loved drawing, the young creators today know much about the industry and intentionally aim their work toward the target platform already in their mind. Creators display a great deal of expertise and struggle to adapt to the new webtoon ecosystem made by dominant digital intermediaries to assert their power.

Producers mediate the conflict between creators and platform companies. As they directly interact with the creators, they understand creators' discontent. At the same time, representing the platform companies, they stand by the commercial side. They are the mediators yet assert their own authority within the power relations. Producers know that the creators' stability, satisfaction, and amiable environment are of utmost importance when it comes to publishing successful webtoons. Thus, they try to respect creators in their work and remain cautious when giving feedback. Producer D states, "Creators are human. They are not factories so I cannot force them to listen to me. Creators are the first. When they do not have fun with their work, then their work shows that." Similarly, B states:

> Basically, I try to respect the creator's opinion. If a creator really does not want to accommodate my feedback, it does not make sense to push it, because it is the creator who makes the story. If the creator is not enjoying the process, it is directly reflected in the outcome.

According to producer A, a creator's autonomy is directly related to the consistency and liveliness of the content he or she produces, so producers try to refrain from aggressive feedback. Producer D commented that producers should trust creators, expressing the sentiment that, because the creators are

the original producers of their works, producers should show leniency toward them so that they can produce a masterpiece.

Nonetheless, producers described their relationship with creators as "strictly business" and try to keep a certain distance. As producer B describes: "It is a relationship where one provides work and the other pays." It tends to create discomfort when the producers are too close to the creators. Generally, the distance is naturally maintained because producers and creators do not communicate face-to-face. Much of the feedback process is done via communication technologies such as e-mails, texts, or phone calls. This denotes how structures of the webtoon ecosystem change along with the rapidly evolving media environment. Platform companies sometimes make rules to prevent intimacy. Distance is important so that producers can assert their power over creators when necessary. Producer B notes:

> Sometimes, when you get too close, you expect what you should not. For example, deadline exists, but creators may ask for late submission without any penalty because they think we are close. If I do it, they will think that rules can be bent and repeat it. That cannot happen. I have to enforce rules.

Although producers respect creators' privilege, they still have their duties to enforce rules and prevent creators' power outgrowing their own. Hence, they cannot yield too much latitude or allow creators to step over business boundaries because producers work for the company. Producers' primary role is to represent their companies, from which they receive authority. B admitted, "I cannot simply stand for creators because in the end I am affiliated with the company." He defines his position as a "mediator," working out conflicts between the company and the creators. Producers' marginal line for leniency was to the point that creators do not negatively affect companies. Such conflicts occur the most when creators demand a wage increase. Creator E requested an increase with her producer, but in the end, she did not win because the producer clarified that company could not provide higher wages.

To claim superiority in this power relationship, such as when creators refuse to accommodate feedback they receive, producers assert their authority in various ways. Sometimes producers rely on their experience in related fields such as publishing (as in the cases of A and B), or they might rely on exterior power relations such as gender or age, as described by creator E. Mostly, power is transferred to the producers from the company's technological affordance. Producer B commented, "Creators trust me. Because when I say 'it would be better this way' and they accept it, most of the times it receives a better response from readers than when they don't take my advice." Having access to reader response data puts producers in a superior position and lends authority to their feedback. Producer D elaborated that if creators do not take his feedback, then he presents statistics such as daily click rates, , number of user-views, number of revisits, and paid view rate. If the numbers are falling, he strongly urges the creator to make necessary changes again. In C's case, because producers have access to the demographic data for the audience, he tries to ease out gender-sensitive issues and provide advice based on audience data. Because producers are employees of the platform companies, they have access to the larger structure where data are centralized, and this creates new forms of accountability and control (Goulden, Tolmie, Mortier, Pietilanien, & Teixeira, 2018).

Creators also understand the ambivalent position of producers. Although they see producers as good people trying their best to respect the creator's freedom and creativity, they realize that producers essentially follow the platform company's commercial logic. In their own ways, creators try to win back their power. They realize that if they follow producers' feedback too much, then their work loses its identity and becomes tainted. In these cases, creators simply disagree and refuse to make changes to their work. "I say I'm sorry but I will just trust my decision," says E. They might make compromises until they gain a sufficient amount of authority and power. Because renowned creators mostly have absolute freedom in planning and carrying out their work, F said she is persevering until she accumulates enough social capital. Creator E said she will heed to producers only until she fully seals the contract. Nonetheless, creators' struggles for autonomy become harder when platform companies or producers have preplanned projects. In those cases, producers "make sure their requirements are met," and such attempts occur more frequently as platform companies prepare to meet the incoming wave of transmedia and transnationalism.

New Challenges to Respond to Transmedia and Transnationalism

Transmedia and transnationalism have become inevitable forces that change the structure of the webtoon ecosystem. Transmedia and transnationalism go hand in hand: Producing multiple texts through multiple media adds values to the franchise, and fostering transmedia production is a response to globalization so that global audiences are encouraged to collaborate on decoding multiple texts (Pamment, 2016). Although interviewees generally agreed that two main factors are restructuring the webtoon ecosystem, their opinions varied greatly in terms of the future of the webtoon industry. In the struggle for power, CEO Z's blueprint suggests how the platform company envisions the future: ultimately, as a structure where companies have "absolute control" of works:

> We are beginning on this project to work more efficiently for us to expand the business.
> It is like hiring creators to make webtoons and give them some royalty on original works
> while we have all copyrights. . . . We need works that we have absolute control of, which
> we have the decision-making power.

Z notes that, for the webtoon industry to expand, transmedia is the best solution to maximize the value of webtoons. He explains that webtoons as a sole content cannot become "super IP," which is intellectual property that has a business value of $5 billion. The webtoon industry must cooperate with the film industry. Z's company is big enough that he is able to bring a webtoon creator, his platform company, and a film production company to one table to build a webtoon product from scratch. Because he constantly takes transmedia into consideration, Z prefers genres with strong characters and storyworlds because they are more feasible to apply to various fields. Characters are considered essential for the successful transition between media (Sánchez-Mesa, Aarseth, Pratten, & Scolari, 2016).

Producers also agree that when they select works, they consistently keep the transmedia possibility in mind. For instance, when producer B encounters webtoons with a universal theme and that would not require much special effect (such as romantic comedy), he thinks of the transmedia possibility. Similarly, creators also respond to the transmedia demand as they work on new projects, knowing that successful cinematization will bring them great fortune. Potential transmedia conversion places pressure on both

producers and creators, and the dynamic of the webtoon ecosystem may be changing because of this extrinsic variable: Producers must constantly persuade creators to adapt to the change, while creators have to either accept or confront it.

Nonetheless, creators state that there are risks in prioritizing transmedia possibilities. They cite "webtoon traits" that cannot be translated to moving images and argue that focusing only on transmedia would critically harm the diversity of webtoon genres. Creators' identities as webtoon creators and visual arts producers are entirely different, as creator F notes. Creator H declared that she would not justify changes or alter her priorities just because it would better suit cinematization. Producer A pointed out that, although there are numerous attempts at cinematization, few are successful, which suggests the difficulty of producing a quality transmedia. Transmedia matters, to be sure, but it remains to be seen how strong this variable will be in transforming the webtoon ecosystem.

When it comes to transnationality in a more general sense, interviewees displayed less unified opinions. Producers generally expressed that transnationality is an ongoing process and that their companies are mostly exporting webtoons to China, Japan, and Thailand. All acknowledged that the Korean market is limited and that foreign markets provide greater opportunities for expanding the industry.[5] Creators express great expectations toward exportation. E mentioned that she always considers and hopes for her work to be exported. Thus, she would be cautious not to criticize certain countries but to talk about universal subjects. F's work was already in the process of overseas expansion to China, so she had to extend the story because China prefers seasonal series. Yet concerns and doubts linger. Successful localizing is seen as the key to success, but it has multiple barriers. Problems of the cultural gap and language barriers are the greatest. F worried that her work, which is a horror webtoon, has a strong Korean connotation because the setting is a Korean school. Overseas expansion would also require modifying her drawings to fit the local style or rearranging speech bubbles to fit different language configurations. Lack of interaction with the audience is also problematic, as G stated: "Webtoon creators are in a symbiotic relation with the audience through constant interaction. But I don't know for foreign audience." Creating a webtoon just to target foreign markets is risky, because in the end, a foreign market might prefer works that have been successful in Korea. Producers A and B noted that, ultimately, the Korean market comes first.

Although transnationalism is fraught with difficulties and risks, foreign markets are crucial targets that the current Korean webtoon industry must tackle in order to accelerate growth. Z, as well as the producers interviewed, acknowledges that the Korean market has clear limits in the number of webtoons that platforms can sell. Even to expand intellectual property, such as producing action figures, a bigger market is more efficient due to economies of scale. Yet, because the webtoon industry is encountering numerous obstacles in its attempt to achieve transmedia and transnationalism, one could easily question whether this is a naturally occurring phenomenon. While platforms would clearly run the risk of pushing the industry toward new flow, it seems that some creators would not willingly accept such a demand. They expressed concerns about mistranslation, overmodification, and possible failures. Producers also noted the

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[5] External factors constantly interfere with the transnational attempt. Z mentioned the influence of international political factors on the timing of his company's targets for overseas expansion. Budgets were also in deficit because overseas marketing is costly.

possibility that, in order to meet the company's demands for transnationalism and transmedia, webtoons' diversity and creators' freedom may be limited. This suggests that the two waves are not necessarily the natural forces that restructure the webtoon ecosystem; yet to maximize profit, the industry would make carefully calculated attempts to successfully attain transnationalism and transmedia. Arguments about transnationalism should lead to a discussion of technological change, geospatial boundaries, social and cultural tensions, inequality, and social penetration (Christensen, 2013). However, for the webtoon industry, this is an industry-enforced and export-oriented wave of transnationalism to increase the influx of capital. This explains Z's comment on creators' stance regarding the changing structure: "I think it will be difficult for this system, like weekly updates, to change greatly. . . . It would be better for the creators to change their environment to fit with the system."

Conclusion

The webtoon industry's structure is constantly evolving as webtoons gain popularity in and outside Korea and the number of different agents entering the production field grows. The field is becoming ever more complex and dynamic as agents interact and struggle in their power relations. This article captures the dynamics and power relations in the webtoon production field based on real and vivid experiences of the agents. Moreover, the webtoon ecosystem is experiencing another big transition with the flow of transmedia and transnationalism. These factors greatly impact the structure of the webtoon production industry, where agents are constituted and constituting at the same time. The idea of duality of structure, whereby agents reproduce structural properties but also alter the structure based on their knowledgeability and reflexivity, enable us to shed light on how agents are responding to changes in the webtoon ecosystem. The results also have strong implications for the history of theoretical discussions on cultural industries, including Hesmondhalgh's emphasis on the aesthetic autonomy in the cultural industries and Jenkins' insight into spreadable media.

The interviewees' responses to structural changes vary. Some, such as the platform companies, actively seek to accommodate these factors by redirecting capital flows. Others, such as webtoon creators, try to react to these changes while essentially maintaining their identities as creators of Korean webtoons. Producers are the mediators between platform companies and creators. They understand the increasing importance of transmedia and transnational flow and are pressured to meet capital's demand; they are also aware of the difficulties that creators face and essential obstacles such as genuine webtoon traits, language barriers, and cultural differences. External to the webtoon ecosystem, variables such as political relations, social changes, and cultural preferences are also impacting the process of adaptation to transmedia and transnationalism. By providing online space where creators can present and share their work, platform companies open unprecedented methods for creators to debut, make a living, and interact with their audience. They also create new jobs for producers, who may or may not have related experience, to conceive new ideas and projects.

To truly saturate the webtoon industry with the flow of transmedia and transnationalism, creators seem to be a genuine source of value. As the interviewees demonstrate, creators' unique and original works are what attract the global audience regardless of cultural or linguistic barriers. However, creators' reluctance to adapt to changes in the webtoon industry could block the industry's efforts to cross the barriers

of media and nation. At the same time, based on the interviews, we can see possible collisions between the creators and companies/producers because the former want to claim rights to their intellectual property no matter how transmedia and transnationalism change the structure, while the latter seek to gain more control of creators' work to expedite transmedia and transnationalism. Nonetheless, the power of the agent, particularly the creative power of creators, is tantamount to capital forces because it is creators' yearning to create art and share their works that helped establish the webtoon industry in the first place.

After conducting multiple interviews, the future of the webtoon ecosystem is still opaque to predict. Many new forces are ripe with possibilities of their utterly changing the structure of the webtoon industry. We cannot offer a clear blueprint of the webtoon industry's future based on the interviews, but we can at least understand a vague idea about how to improve the industry, hinted at in creator H's comments. She said, "I feel powerless and overwhelmed, more like suffocated from this structure, and how this structure still continues to exist in this way. Why doesn't it, so unfair and so consuming, change?" Perhaps a true change in the structure toward prosperity could begin with allowing agents to break away from the oppressive structure through constant reflexivity.

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