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# In the Closet: Japanese Creative Industries and their Reluctance to Forge Global and Transnational Linkages in ASEAN and East Asia

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**Abstract:** *This paper addresses rarely asked questions: is Cool Japan a creative industries policy and, if so, what kind of creative industries policy is it? It addresses these questions by examining Cool Japan's differences from the UK derived and globally very influential creative industries model. The paper will try to make sense of these differences by looking at how the Japanese creative industries comprise businesses of different sizes with a varied history and prestige, how those companies have complex and contrasting relationships with various state organisations, and how the forces of globalisation and its free-market and neo-liberal economic ideologies affect companies in various sectors differently. This will challenge the dominant narrative of Japanese Creative Industries and Cool Japan in which, it is generally believed, the former embraces globalisation and digitalisation, and the latter is responsible for broadening the appeal of Japanese popular culture abroad. This paper reveals the complexity and diversity of the creative industries from socio-cultural and politico-economic perspectives often overlooked in the Cool Japan discourse*

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## 1. Introduction

In stark contrast to other Asian countries, the term and idea of 'creative industries' have drawn very little attention in Japan. The term is rarely used outside a small community of bureaucrats and scholars – even in its translated form, Sōzō Sangyō, or the English loan word, Kurieithibu Sangyō.[1] This is surprising considering that Japan has been known for its rich and diverse range of popular culture, which is particularly well received in Southeast and East Asia. However, an idea similar to creative industries has been widely and hotly discussed in Japan at least since the early 2000s. This idea is 'Cool Japan', which is a discourse about the popularity of Japan's cultural content (mostly manga and anime) in overseas markets and various policies to increase the exports of such cultural content. A growing amount of research on Cool Japan (e.g. Condry, 2009; Daliot-Bul, 2009; Iwabuchi, 2015; McLelland, 2016; Mōri, 2011; Otmazgin, 2011; and Valaskivi, 2013) explicitly or implicitly equates it with creative industries policy, but the specificity of Cool Japan as a creative industries policy as such is not examined.[2]

In the context of this recent development, this paper addresses rarely asked questions. Is Cool Japan a creative industries policy and, if so, what kind of creative industries policy is it? It addresses these questions by analysing Cool Japan, not as a catch-all term for Japanese popular culture, but examining its differences from and similarities with the global creative industries model and discourse, which has engulfed the rest of the world including Southeast and East Asia (e.g. Hartley, 2005). The paper begins by explaining how Cool Japan differs in several ways from the global creative industries model, given shape by the Department for Digital, Culture, Media and Sport of the United Kingdom (UK), in particular its 'Creative Industries Mapping' (2001), and studied by a growing number of scholars (e.g. Flew, 2013).[3] To make sense of the particularity of the Japanese creative industries and their varied relationship with the state, this paper will look at how the Japanese creative industries comprise businesses of different sizes with a varied

[1] See Oyama (2015) for a more detailed examination of different terminology used in Japan to refer to the cultural and creative industries.
[2] A rare exception to this omission is a recent work by Kawashima (2018).
[3] The definition of the creative industries used by some scholars, such as Howkins (2007) and Pratt (2005), is much wider and more inclusive because every industry and economic activity contains creative elements.

history and prestige, how those companies have complex and contrasting relationships with various state organisations, and how the forces of globalisation and its free-market and neo-liberal economic ideologies affect companies in various sectors differently.

This will challenge the dominant narrative of Cool Japan and the global creative industries on several fronts. Firstly, as someone who had ‘Japanese creative industries’ in the job title for 7 years,[4] I notice a view amongst many people – both Japanese and non-Japanese but particularly Asian – that state-led Cool Japan has been very successful in, and even chiefly responsible for, building the current popularity of Japanese popular culture.[5] This view is undoubtedly influenced by the image of East Asian style state capitalism. This paper challenges these views by offering a more nuanced assessment of this causal relationship. These people also tend to believe that the Japanese creative industries wholly embrace globalisation and digitalisation, which may be derived from the strong association between Japan and exports and technology. This paper highlights how Japanese old media groups, for instance, have been reacting to the challenges of globalisation and digitalisation in a very nation-centric way, which clashes with the global creative industries model and its unreserved faith in globalisation and digitalisation. It also highlights tension within the creative industries by introducing emerging internet companies, which pursue globalisation and digitalisation to such an extent that they sometimes clash with the old media groups. This paper, therefore, reveals the complexity and diversity of the creative industries in a different socio-cultural and politico-economic situation in which the state plays a more nuanced and contradictory role than Cool Japan discourse.

[4] I worked for Birkbeck College in London for 7 years (2008–2015) as a lecturer and programme director of the Master of Arts degree in Japanese Creative Industries Studies.

[5] I am surprised by the number of international applicants, mostly from East and Southeast Asia, who would like to come to Japan to study Cool Japan at a graduate level so that they can emulate it in their home countries.

## 2. What is Cool Japan?

Cool Japan is a discourse about the overseas popularity of Japan's popular culture, mostly manga and anime, and a set of economic, political, and diplomatic policies to capitalise on it. The term is derived from the article on 'Japan's Gross National Cool' by Douglas McGray (2009) and became a national buzzword that has inspired an endless stream of magazine articles, television series, government reports, and new businesses. Amongst many things, Cool Japan is a response to the opportunities and risks brought about by globalisation. On the one hand, it is a response to the perceived opportunities opened up by the globalisation of media – driven by the internet in particular – which have enabled a massive amount of Japanese content such as manga and anime to circulate even the remotest corners of the world rapidly, but mostly un-monetised, much to the chagrin of business (e.g. Lee, 2011). On the other hand, fierce competition from other East Asian economies – especially China and the Republic of Korea (henceforth, Korea) – has eroded Japan's competitive advantage in manufacturing.[6] In 2011, the Ministry of Economy, Trade and Industry (METI) admitted that automobiles and electronics would no longer promise enough growth (METI, 2011). In 2012, Prime Minister Abe Shinzo appointed his close ally Tomomi Inada as the first ever minister of 'Cool Japan' strategy to make cultural content one of the next sources of growth and job creation.

METI first set up an office specialising in media and content policy in 2001, which planned and implemented various media content-related policies. In 2010, it opened the Cool Japan Office under the Manufacturing Industries Bureau, which is called the Creative Industries Promotion Office in English. Using the terms 'Cool Japan' and 'creative industries' interchangeably, METI says it 'promotes overseas advancement of an internationally appreciated 'Cool Japan' brand, cultivation of creative industries, promotion of these industries in Japan and abroad, and other related initiatives from cross-industry and cross-government standpoints' (METI, 2016). As far as METI is concerned,

[6] For example, Samsung surpasses two iconic Japanese companies – Sony and Panasonic – in sales and profits in consumer electronics, a symbolic sector which has long been a source of Japan's national pride and identity (Yoshimi, 1999). In 2016, Taiwan-based Hon Hai, also known as Foxconn, purchased the struggling Japanese electronics company Sharp, a once revered innovator in electronics.

Cool Japan and creative industries policy are the same thing. Nevertheless, if we examine Cool Japan as creative industries policy, it has some interesting differences from the global creative industries model.

Let us look at the report on Cool Japan published in April 2018 by METI, which explains the rationale and strategies behind the Cool Japan Fund (CJF), whose mandate is to invest ¥69.3 billion in various Cool Japan-related businesses and provide hands-on consulting advice (METI, 2018). Learning from more than a decade of debates and some trial and error, analysed in Kawashima (2018), the CJF's investment portfolio is divided into three core industries: media content (mostly anime and manga), fashion and lifestyle, and food and services. In each industry, the strategy is to focus on developing a platform and supply chain, which have proved to be a bottleneck in global distribution for Cool Japan-related content, and to facilitate broad collaboration to help regional firms and small and medium-sized enterprises expand overseas.

As of May 2018, the CJF had invested in nine companies in media content, four in lifestyle, three in inbound travel-related business, and 10 in food and related services. In the content category, in which ¥23.8 billion was invested, it allocated ¥1.5 billion to Tokyo Otaku Mode, a new internet commerce site selling manga, anime, and other otaku-related products. It made a ¥1 billion investment in Bandai Namco Holdings, a game and toy company, for its simultaneous online distribution of anime. It also made a rather large ¥7.5 billion investment in partnership with Imagica Robot Holding and Sumitomo to purchase SDI Media Central Holdings, a leading media localisation company based in the United States (US), for ¥19 billion to facilitate the localisation of Japanese content in more than 80 languages (Nikkei, 2015). It invested ¥405 million in Kadokawa Contents Academy, a new business by Kadokawa, which operates three schools across Asia to educate future anime and manga creators (KADOKAWA Contents Academy, 2019). The fund also generously invested ¥4.4 billion in WAKUWAKU, an entertainment channel by SKY Perfect JSAT Group, Japan's largest satellite TV, which broadcasts Japanese content in eight Asian countries.

In the lifestyle category, which received ¥13 billion, the most substantial investment was by far the ¥11 billion invested in H2O retailing. This Japanese retail group, which has annual turnover of ¥850 billion and operates Hankyu and Hanshin department stores, built a massive retail space in the Chinese city of Ningbo that houses more than 100

Japanese stores to provide the Japanese experience to Chinese customers. Another retail giant with annual sales of ¥1.28 trillion, Mitsukoshi Isetan HD, received a comparatively modest ¥1.1 billion from the CJF to build a retail outlet that houses Japanese lifestyle goods in Kuala Lumpur, Malaysia.

In the food category, a little over ¥11.6 billion has been invested. The largest two investments are the Japanese Food Town in Singapore, which consists of 16 restaurants that offer authentic Japanese food; and a company that operates Ramen chain Ippudo, which received ¥0.7 billion to expand its international chain. Three investments were made in the inbound category, including a joint project by seven local prefectures in the Setouchi area aimed at increasing inbound tourists, which received ¥1 billion, and an Airbnb-type service for the international traveller, which obtained ¥300 million.

## 3. Cool Japan as Creative Industries Policy?

Examining the CJF, and the type of investments it has made, reveals some intriguing points that make Cool Japan significantly different from the global creative industries model. Firstly, Cool Japan is focused exclusively on international promotion. This is different from the creative industries model in the UK, which focuses more on domestic rather than international policy. Contrary to the general perception in Japan, the creative industries policy in the UK is about job creation and growth and has generally not been considered part of public diplomacy (Ohshita, 2009: 130), unlike Cool Japan. The idea of the creative industries was designed, first and foremost, to offset the rapid loss of a large number of manufacturing jobs (Oshita, 2009: 132). Accordingly, it included several policies to address youth employment such as a large-scale apprenticeship programme, particularly in the geographical regions most severely hit by the decline in manufacturing (Oshita, 2009: 132). In a similar vein, many initiatives directly targeted students. For instance, the Higher Education Funding Council for England introduced a designated fund in 2001 to stimulate innovation in higher education. Using this funding, many universities collaborate with companies in the creative and cultural sector (Oshita, 2009: 134). A creativity partnership initiative also targeted students aged 11–18 to improve ‘creativity skills’ in partnership with various creative professionals such as architects and artists.

Cool Japan has never paid much attention to the issue of youth employment in the creative industries, although Japan is also coping with the loss of manufacturing jobs. What is more, the original idea of the CJF was to support small businesses, which, according to CJF director Mr. Ibuki, ‘do not have the money and experience to expand business overseas’ (Fukase, 2013). As we saw earlier, however, the CFJ has invested in some of Japan’s largest companies in the creative industries. Additionally, despite its fervent celebration of the outbound globalisation of cultural products and services, apart from the emphasis on promoting inbound tourism, there is a conspicuous absence of discussion on stimulating inbound investment in Cool Japan-related business, which would be highlighted much more in many other countries including the UK. For instance, the government has gradually strengthened, not weakened, the restriction on foreign investors’ stakes in Japanese broadcasters and the discussion to weakened has only begun in 2018 (The Sankei News 2018).

Cool Japan is clearly a national branding exercise much more than a creative industries policy. Key characteristics of Cool Japan as a creative industries policy should be understood in terms of Japan’s historical relationship with the West and its desire for Western recognition and approval – no longer in economic terms but in increasingly symbolic or cultural terms (Iwabuchi, 2015). Prime Minister Abe was explicit about this point when addressing expert committees on Cool Japan in Cool Japan Fund 2013, stating that funds totalling ¥50 billion had ‘been secured to communicate Japan’s wonderful and positive aspects overseas’ (Prime Minister of Japan and His Cabinet, 2012). According to him, the idea was to break a sense of stagnation in Japan and communicate to both Japanese people and foreigners that Japan and its traditional culture are ‘wonderful.’ This point is highlighted by the CJF, which states that one of its qualitative investment criteria is to ‘build brand awareness of Japan in global markets’. It also says that CJF investment needs to have a ‘knock-on effect’ and a broadcasting effect on consumers worldwide. In other words, Cool Japan has been used as a complex and contradictory discourse to justify or indeed presuppose failure in economic objectives through an emphasis on noneconomic returns for the nation, such as national branding, cultural exchange, and international diplomacy (Leheny, 2006).

Equally importantly, Cool Japan excludes television, new media, advertising, and other industries – all of which are considered the core of the creative industries (Hesmondhalgh, 2012: 17). For instance, the UK's creative industries usually include information technology, software and games, advertising, film and television, publishing, music and the arts, architecture, design, and fashion in order of market size, so the absence of these economically significant sectors in Cool Japan is rather conspicuous. The CJF is focused on the international market for just three industries: media and content (or manga and anime judging from its investment so far), fashion and lifestyle, and food and services. Only one of these industries – media content – is usually considered part of the core of the creative industries. Combining this with a sole focus on the international market makes Cool Japan's potential economic impact relatively insignificant compared with a case where it included the core of the creative industries.

Creative industries in the US generate more than 17% of its annual turnover in the overseas market, while Japan's remains low at 2.8%. Therefore, there is room for growth in the international market. However, if one looks at the size of actual revenue inflow for media and content – character goods ($315 million), animation ($130 million), and manga ($120 million) – it becomes apparent that they are not enough to have a substantial influence on employment and growth, even in the most optimistic growth scenario.[7] On the other hand, there is room for growth in the domestic market as the Japanese content market is 2.2% of domestic output, which is significantly smaller than around 5% in the US and the UK. For example, new media, which is mostly absent in Cool Japan, is the largest industry covered in the UK creative industries policy; and has recorded the most growth in many countries, including Japan. The government could do much to encourage domestic growth in the creative industries relative to overall gross domestic product.

METI's Media Content Industries Department, creatively in 2001, identified early in the 2000s some of the most important issues within the creative industries that hinder industrial growth (see also Kawashima, 2018: 22). These included (i) the lack of finance

[7] All figures are from METI (2011).

for small to medium-sized content production companies; (ii) the unequal relationship between production companies and distributors such as broadcasters; and (iii) the lack of producers who can manage both production and business, including finance, accounting, distribution, and international marketing. These are all significant issues which continue to slow growth across the creative industries, but they retreated into the background as Cool Japan took centre stage.

Unlike countries such as the UK or Korea, where a single agency/ministry oversees the creative industries, Japan has half a dozen ministries and agencies involved in Cool Japan. These ministries compete against each other at the cost of overall coordination – METI; the Ministry of Internal Affairs and Communications (broadcasting and telecommunication including the internet); the Ministry of Foreign Affairs of Japan; the Ministry of Education, Culture, Sports, Science and Technology (arts support in general); the Ministry of Land, Infrastructure, Transport and Tourism (tourism); and the Ministry of Agriculture, Forestry and Fisheries (Japanese foods). The absence of broadcasting and the internet should also be understood in terms of inter-ministerial rivalry since these industries, while a significant part of the creative industries, are not regulated by METI (Matsui, 2014).

To summarise, there are vital differences between the global creative industries model and Cool Japan, but these differences, their contexts, and implications are largely overlooked in existing research. Despite its significant divergence from the global creative industries model, what Cool Japan has achieved, relatively successfully, is to project the image of a nation where the creative industries – not limited to media content but more generally – are taken seriously and are supported generously and aggressively by the government to seize opportunities opened up by globalisation and digitalisation. What is masked is the current shape of the core of the creative industries and their much more nuanced and contradictory relationship with the state as well as globalisation and digitalisation. The following section looks at the core of the creative industries and discusses how different actors interact with the state and negotiate the effect of globalisation and digitalisation differently.

## 4. The Current Shape of the Japanese Creative Industries

In the context of more than 20 years of relatively slow growth since 1993, it has become commonplace to talk about Japan's problems – particularly in terms of its contrast with other Asian countries, which are growing at a much faster pace. This is evident in the case of China or, in the context of the creative industries, Korea, where some of its cultural products increase its presence in the region, and whose 'success' has been closely studied in the planning of Cool Japan (Chua and Iwabuchi, 2008; Jung, 2011). However, it is also essential to have a regional perspective on the Japanese creative industries. In many ways, Japan still has the most advanced creative industries in Asia as the following examples show.

In 2012 recorded music sales, Japan was the second largest market in the world with a trade value of $2,727 million – half the size of the US market ($5,916 million) and twice as big as the UK ($1,310 million). Korea was the second largest market in Asia at $497 million, about 18% of Japan's market value, while China accounted for $292 million or 9.3% of the Japanese market value (Longlow's Diary, 2018). In terms of advertising spending, which indicates the size of the commercial media market, China is the biggest ad spender in Asia at $86.2 billion, followed by Japan with $42.51 billion, Korea with $12.55 billion, and Indonesia with $9.76 billion (Statista, 2019). This trend more or less follows the same pattern for other sectors and genres (Dentsu Sōken, 2014). For many years, the creative industries in Japan have consistently produced highly localised and differentiated products in the sizeable domestic market in fierce competition.[8] The market size is declining slowly as the population dwindles, but it is nonetheless worth remembering the sheer size of the Japanese creative industries.

[8] It has been argued that the Japanese system, including media, evolves through decades of fierce but closed competition into something of a Galapagos – so different from the global model that few people outside the country understand it. (For discussion of Galapagosisation, see Mizukoshi, 2014).

## 5. Old Media

Let us turn our attention to what in Japan is called the mass communication industry, or masukomi gyōkai, which is significant, the most privileged and influential part of the creative industries, and which hereafter I will call old media. Such old media is not considered at all in Cool Japan discourse, indicating that it is operating in a different political and cultural sphere. To put it bluntly, while Cool Japan is concerned with the overseas market and thus a positive response to globalisation, old media resists the effect of globalisation, sometimes with state aid, as well as a challenge from new media – reflecting the complexities within the Japanese creative industries.

Old media consists of old and established companies in what has been usually referred to as the four media: broadcasting, publishing, newspapers, and advertising. The most significant players are NHK (the world's largest public broadcasting company) and five large media groups that own television and newspapers through cross-ownership. These include Yomiuri newspaper and Nippon Television, Asahi newspaper and TV Asahi, Sankei Newspaper and Fuji television, Mainichi newspaper and TBS, and Nikkei and TV Tokyo. Added to this are publishers such as Kadokawa and Shogakukan and large advertising agencies such as Dentsu and Hakuhodo. The list of major players has not changed significantly for well over 50 years, reflecting a lack of competition and disruptive technological innovation. These old media companies control the Japanese creative industries.

Employees in old media companies have long enjoyed prestige, exceptionally generous salaries, the security of lifetime employment, and other perks. The jobs are usually long and tiring but are consistently represented as fun and stimulating. The pay is better than in large banks or finance, and far better than in global manufacturing companies such as Toyota or Sony. *Toyo Keizai*, a business journal, publishes the top 300 companies with the highest average salary. Of the top 20, seven are old media companies. Most commercial television companies in Tokyo and Osaka ranked in the top 20, all of them paying close to ¥15 million in average annual salaries. Fuji television has been in the number one spot for many years. Large national newspapers and Dentsu are also amongst the top 20, with average salaries of well over ¥12 million (Akamine, 2013).[9]

Naturally, competition is fierce amongst college graduates to get into old media companies. There are 300 applicants for each new Fuji television opening. Old media is notoriously conservative, and they rarely hire outside a small number of elite universities. Graduates have to go through the same recruitment process as for manufacturing or banking companies. This means wearing a dark suit, filling in 'entry sheets' or standardized job application forms, and going through a series of routinized interviews. Old media is a male-dominated world. At major Japanese commercial television companies, only about 20% of all employees and less than 10% of employees above manager level are women. NHK, a public broadcaster, is worse, with 11% women and 2% women above manager level (Gender Equality Bureau Cabinet Office, 2011). In addition, broadcasters and other large companies generally hire not a small number of graduates based on their connections, such as a close family relationship with large advertisers, other media companies, politicians, regulators, or other celebrities.

For example, many important ruling Liberal Democratic Party politicians had their sons and daughters at one of the big old media companies. The nephew of the current Prime Minister, Shinzo Abe, is now at Fuji television. Former Prime Minister and Liberal Democratic Party kingpin Yasuhiro Nakasone's daughter is at NHK and his grandson is at Fuji. Former Prime Minister Keizo Obuchi's daughter, who was also a minister at METI, was at TBS. Two former governors of Tokyo, Shintaro Ishihara and Naoki Inose, had their son and daughter work for NTV and NHK respectively. A similar practice is common in large advertising agencies and newspapers. This shows the social status of working in old media and its cosy relationship with the establishment.

Contrary to some global discourse surrounding the creative class (Florida, 2002), this demonstrates that old media is not interested in hiring people with a creative spark as administrators of creativity. From the perspective of these groups, this is hardly seen as a problem, as most of the real creative works have been outsourced to a large number of small production companies and independent creators, which can hire the type of

[9] The average includes young employees in their early 20s and administrative staff, so those in the prime 30–50 age group earn significantly more (President, 2007).

Harajuku-style flamboyant youth featured in Cool Japan promotion. The working conditions for the youth in smaller firms in the creative industries are dire. While this issue is mostly ignored, the predicament of Japanese animators has drawn some attention. According to Mōri (2011), 73% of young Japanese animators earn less than ¥1 million a year; 44% of them are in their 20s and 40% of them quit within 5 years. In television production, the exploitation of this outsourced labour has been so severe that the regulators, the Ministry of Internal Affairs and Communications (MIC), have intervened to protect production studios (MIC, 2014; see also Shibayama, 2010). A similar gulf in salary and career prospects, stability, and social status exists within old media across different sectors. This is also the case in the creative industries of other developed countries, typically expressed as the 'exploitation of dreams' (e.g. Gill and Pratt, 2008; McRobbie, 2015), but what is characteristic about Japanese old media is that it is more difficult to 'work your way up' as the job market lacks mobility and flexibility. Large companies in old media are still reluctant to hire mid-career professionals. In reality, the window to join opens just once for selected university fourth-year students participating in university recruitment programmes.

Rather than the flexible and creative environment usually celebrated by the literature on the creative industries (Florida, 2002), then, working conditions in the most prominent Japanese media industries seem instead to conform to the strict rules, regulations, and management typical of Japanese corporate culture (Low, Nakayama, and Yoshioka, 1999). Old media have a very cosy relationship with regulators, who have been reluctant to change regulations and promote competitiveness in this highly protected sector which has produced little growth, hardly add employment and, regarding broadcasting in particular, shows little appetite to go digital or global. If anything, Japanese regulators have helped these media oligopolies to maintain their privileged positions, effectively precluding ownership change and foreign investment (MIC, 2005).

Content with a large local market, old media has not been much concerned with going global. Japan's most prominent media group, Fuji Media Holdings, had turnover of ¥646 billion ($6 billion) in 2018 and was leading the Japanese television industry with a series of highly successful variety shows and trendy dramas, including the famous Tokyo Love Story which was consumed widely in Asia (Iwabuchi, 2002; 2004). While being the biggest television group in Japan, the group's overseas sales account for less than 1% of its total sales. This dependence on domestic sales and indifference to the international market is the same at all the major broadcasters (Ohba, 2012). In comparison, Walt Disney has ¥5.7 trillion in revenue (23% overseas) and News Corp. has ¥5.15 trillion in revenue (20% overseas).[10]

On home soil, Japanese old media has stopped Western competitors from challenging their domestic dominance. Western media has so far failed to mount any serious challenge in broadcasting, publishing, newspapers, or advertising. Japanese old media is protected by various regulations and policies, including strict resale price maintenance, limited membership to news sources for newspapers,[11] and other news media and broadcasting laws banning the foreign ownership of broadcasting stations. Overall, old media has resisted the effects of globalisation at home surprisingly successfully and, barring a few exceptions, diverges from the typical neo-liberal and free-market imperatives of the global creative industries by withdrawing to the domestic market.

In turn, the Japanese government and its various regulatory agencies have been reluctant to do much to change business practices or promote innovation in this highly protected sector, which has produced little growth and employment and shown little appetite to go global. For instance, a myriad of regulations and practices that prevent digital distribution in publishing, broadcasting, or music from flourishing has been left untouched so that the old system can continue to benefit from the current copyright laws (Kidokoro, 2013). It has done little to break Dentsu's monopoly on media buying in Japanese advertising business, which has prevented innovation and new entrants in creative production (Sasaki, 2007). It does too little to change unfair practices in which television networks exploit numerous small production studios[12] or pay little to no fees

[10] Publishers such as Shueisha (Japan's largest publisher with annual sales of ¥123 billion), which publishes the most popular manga weekly *Shonen Jump*, have been more active in developing international business as they push manga content. Nevertheless, its overseas business is proportionally not as large as the world's largest international publishers such as Pearson or Thomson Reuters. Exceptions also include Japan's largest advertising agency, Dentsu, and Nikkei. Dentsu acquired British advertising agency Aegis in 2012, raising its overseas sales ratio to 54% in 2015. Nikkei, with annual sales of ¥300 billion, acquired the *Financial Times*, one of the world's most prestigious business newspapers with annual sales of ¥50 billion. Both are missing in the Cool Japan discourse.

[11] This system is called Kisha-kurabu seido (reporters' club), which only give reporters from large Japanese newspapers and television companies access to news sources such as the police, government ministries, and other important public and private institutions (Freeman, 2000).

[12] For example, the UK's creative industries policy has an independent production quota that

for the use of specific bands of the electromagnetic spectrum to transmit signals, for which the mobile operates pay hundreds of billions of yen (Ikeda, 2006). It has effectively banned new entrants and ownership change in the television industries and overseas investment.

## 6. New Media

Another huge part of the creative industries that has been missing in the Cool Japan debate in Japan is new media, which has grown rapidly since the 1990s – challenging the dominance of old media for the time and attention of Japan's 100 million internet users. New media is almost by definition more global. With the benefit of global 'platforms' (Gillespie, 2010) such as YouTube and Netflix, it is much easier for new media companies to go global. Accordingly, unlike in the world of old media, Google, Facebook, Twitter, Yahoo!, and other global media companies have firmly established their position in the Japanese new media ecology. Japan has also produced home-grown new media, which is competing with Western media companies in many areas.

One of the biggest and in many ways representative (in terms of its hybridity) new media players is Yahoo! Japan, which is only 30% owned by Yahoo! Inc. in the US (unlike subsidiaries in other countries that are majority owned) and thus retains substantial autonomy from Yahoo! Inc.[13] It offers different services from Yahoo! Inc. and is a market leader in many areas including search (competing relatively well with Google), auction (pushed eBay out of the country), news, and other vital services. With net sales of ¥897 billion, Yahoo! Japan was already the biggest media company in terms of sales in 2018, ahead of Yomiuri Shimbun group and Fuji Media Holdings; and is by far the most profitable.[14] The management teams of many new media companies, as well

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mandates large networks like the BBC to buy a share of programming from independent production companies. It also allows independent television production to retain the copyright unless stipulated otherwise in the contract (Doyle and Paterson, 2008).

[13] This is because Tokyo-based SoftBank Corp. is the biggest shareholder in both Yahoo! Japan and Yahoo! Inc.

[14] Dentsu is excluded because it treats billing as sales, which is not compatible with the other accounting systems.

as their employees, are generally much younger than those of old media, and the new media job market is significantly more flexible and mobile. Yahoo! Japan had 5,547 employees in 2015 (excluding subsidiaries) who are on average 35.6 years old of age and make ¥7.1 million, with a turnover of 4.7 years. In contrast, the average age of 6,112 employees at the broadcaster Fuji Media Holdings, the parent company of Fuji television, is 44 years with an average salary of ¥15 million. These figures are also reflected at the very top: Yahoo! Japan's CEO is 45 years old, while Fuji's CEO is 75 years old.[15]

In social media, Japan has a different ecology from Western countries (Mizukoshi, 2014; Takahashi, 2010). Tokyo-based Mixi was a market leader for a long time, although it has been taken over by Facebook and Twitter. Mobile social gaming platforms are the newest forces in new media in Japan, having exploded in the last decade. One of the two major players is GREE, which started operations in 2004 and whose revenue surpassed ¥150 billion in 2012 and 2013, mainly from the controversial kompu gacha (a random reward system that costs players a large amount of money) (GREE, 2019). The other social media platform, DeNA, recorded net sales of ¥202.4 billion and profit of ¥79.2 billion in 2013, marketing similarly controversial but hugely profitable games (DeNA). Both DeNA and GREE have invested in foreign markets and mergers and acquisitions. In 2013, the world smartphone game category included five Japan-based companies (Gangho, Line, GREE, DeNA, and Supercell owned by SoftBank and Gangho) (MIC, 2014: 73). LINE, developed by the Japanese arm of Korean company Naver, is developing a considerable user base with its playful messenger-based social app. At the end of 2018, LINE had 194 million active users globally, of which 164 million were in Japan, Indonesia, Taiwan, and Thailand (Uniad 2019). Other notable Japanese players include Ameba (blogging platform used by Japanese celebrity blogs with a page view of 230 million pages per month) run by Cyberagent, an internet ad agency.

Large new media companies have become popular amongst graduate and mid-career professionals. *Toyo Keizai* (2014) reported that DeNA, GREE, and Cyberagent have become the new top three companies for students at the prestigious University of Tokyo, ahead of trading companies, banks, and management consulting, which have traditionally

[15] Based on corporate data published on Yahoo! Finance http://stocks.finance.Yahoo.co.jp/stocks/profile/?code=4676.T (accessed 20 July 2018); http://stocks.finance.Yahoo.co.jp/stocks/profile/?code=4689.T (accessed 20 July 2018)

attracted these top students in recent decades. New media companies offer a competitive salary, opportunities from a significantly younger age than old media, and more exciting and entrepreneurial working environments. In 2014, DeNA hired 28 University of Tokyo graduates and Cyberagent hired eight, while the once-revered Asahi Newspaper was not able to hire a single student from the University of Tokyo – signalling the decline of old media vis-à-vis new media.

In the midst of the shift in the balance of power, old media seems to have mixed feelings including contempt, suspicion, fear, and reluctancy to work with new media, particularly as the decline of old media is irreversible but noticeably slower in Japan than in other developed countries (Dentsu Sōken, 2014).[16] To further this defensive interest, old media often seek intervention and outfight protection from regulators at the cost of the overall competitiveness of the creative industries.[17] In this connection, a view inspired by Cool Japan, in which Japan is seen as a nation where the creative industries are taken seriously and supported generously by the government to seize opportunities opened up by globalisation and digitalisation, does not seem to hold. Instead, what this analysis attempts to show are the different ways in which sectors within the creative industries are negotiating the forces of globalisation and digitalisation.

## Conclusion

Cool Japan is uneven as a creative industries policy, and that unevenness is attributable to a number of local factors including its character as a national branding campaign and the rivalry between different ministries. This paper has attempted to show some of the critical characteristics of Cool Japan as a creative industries policy and the current shape of the core of the Japanese creative industries and their various relationships with the state, which have been understudied. Moreover, an overarching view of the global creative industries model, based on open trust in the free market and the neo-liberal

[16] For instance, 80% of recorded music sales in Japan in 2012 were physical compared with the US where only 34% were physical.

[17] See Oyama and Lolli (2016) for further discussion.

economic model, does not hold if seen from Japan's perspective. This paper begins to show how the deterministic narrative, depicting the linear and inevitable spread of the global creative industries model, needs to be analysed through the complex articulation of global processes with local socio-cultural and politico-economic specificities.

If Japan had the global creative industries model, it would have led to much more comprehensive deregulation and globalisation, both inbound and outbound, in the core of the national media and cultural industries. Heizo Takenaka, an infamous champion of neo-liberal reform who was a former Minister of Internal Affairs and Communications and Minister of State for Privatization of the Postal Services, remarked in 2006 and again in 2015 that for Cool Japan to be really 'effective', it would need a 'Japanese Time Warner' (Sangyō Kyōsōryoku Kaigi, 2015). This would mean allowing a merger between NTT, Fuji, Shūeisha, and so on to compete with Western media conglomerates. Nevertheless, even Takenaka, who managed to privatise the Japanese post office, which had the largest savings bank in the world, failed to achieve this (Lechevalier, 2014). As a result, Japan is still relatively insulated from the incursion and discourse of the global creative industries, which has contributed to an idiosyncratic organisation or ecology of its creative industries – producing distinctive, if characterised as Galapagos, forms of popular culture that continue to intrigue international audiences, particularly in Asia.

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