

A Study on the Cultural Development of Korea towards Thailand through the New Southern Policy¹

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Abstract

Korea's current administration introduced the New Southern Policy in 2017, with the aim of creating a "people-centered community of peace and prosperity" between Korea and the ASEAN countries. Thailand is a central hub for Korea to strengthen and expand its regional soft power, and is the largest market for Korean culture, as represented by the Korean Wave or Hallyu. However, despite these close ties between Thailand and Korea, economic cooperation between the two countries has remained stagnant compared to other ASEAN countries. In this context, this paper analyzes the New Southern Policy in Thailand and its cultural implications. Specifically, it hypothesizes that the New Southern Policy is an effective policy to enable cultural development of Korea and Thailand and highlights the policy's importance for strengthening cooperation and economic development of both countries based on assessments made by the Korean government. Under the New Southern Policy, Korea has been seeking to strengthen its soft power and promote mutual prosperity through bilateral cultural exchange, rather than a one-way expansion of Hallyu. It is possible to anticipate that prioritizing the co-prosperity of Korea and Thailand through active cultural and people-to-people exchanges will foster the cultural and economic development of the two countries in the long term.

Keywords: New Southern Policy, Korea, ASEAN, Korea Wave, Cultural Development

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1. Introduction

1.1 Research Background

On November 9, 2017, the Moon Jae-in administration officially announced the New Southern Policy and, on November 13, laid out the "Korea-ASEAN Future-oriented Community Initiative" at the ASEAN Business and Investment Summit held in the Philippines. This initiative revealed Korea's plans for its future relations with ASEAN countries, including the goal to raise the bilateral cooperation between Korea and ASEAN countries to the level of the United States (US), China, Japan, and Russia and move beyond partnership to building a shared community by 2022. On August 28, 2018, the Presidential Committee on New Southern Policy was officially launched, and President Moon Jae-in delineated the scope of countries considered in the New Southern Policy through his visits to Vietnam, Indonesia, the Philippines, Singapore, and India.

The implementation of the New Southern Policy can be explained in two ways. First, the ASEAN market's rapid growth and the changes in the consumer and FDI markets have become visible. In recent years, emerging economies have been increasing their share of the global economy and according to the IMF's 2019 survey, they accounted for 59.81% of the world's GDP and this share is expected to exceed 60% in the future (International Monetary Fund, 2019). In particular, Southeast Asian countries have emerged as the alternative market to replace China (Kim, 2019) with global companies urgently considering to relocate their Chinese factories to Southeast Asia due to China's rising labor costs and tariffs, signifying the beginning of the end of the 'Made in China' era. As such, the ASEAN countries and India have gained Korea's attention as important partners for diversifying its overseas trading markets beyond its current trade relations concentrated on advanced nations (Presidential Commission on Policy Planning of the Republic of Korea, 2018a).

Second, Korea has been walking a tight line amidst the US and China trade disputes, which underlined the need to become less dependent on the G2 nations economically and relieve the instability in Northeast Asia for peace on the Korean peninsula politically. Korea had experienced how easily it can be exposed to various economic difficulties in 2016 when China retaliated against Korea's decision to station the US Army's Terminal High-Altitude Area Defence (THAAD) system. The retaliation had resulted in a sharp decline in its exports to China, fierce anti-Korea boycotts and sentiments from the Chinese, the retraction of Korean companies from China due to various disadvantages imposed on them, and a noticeable decline in the number of Chinese tourists visiting Korea. Thus, Korea's New Southern Policy can be seen as the country's attempt to resolve the problems associated with its heavy dependence on the G2 nations and to overcome its economic difficulties through new opportunities born from stronger economic cooperation with ASEAN countries.

The New Southern Policy proposed a vision for Korea's cooperation with ASEAN nations which

could be summed up as a "3P Community" - a community of people, prosperity, and peace. The 16 main policies set forth under the 3Ps are summarized in below Figure.

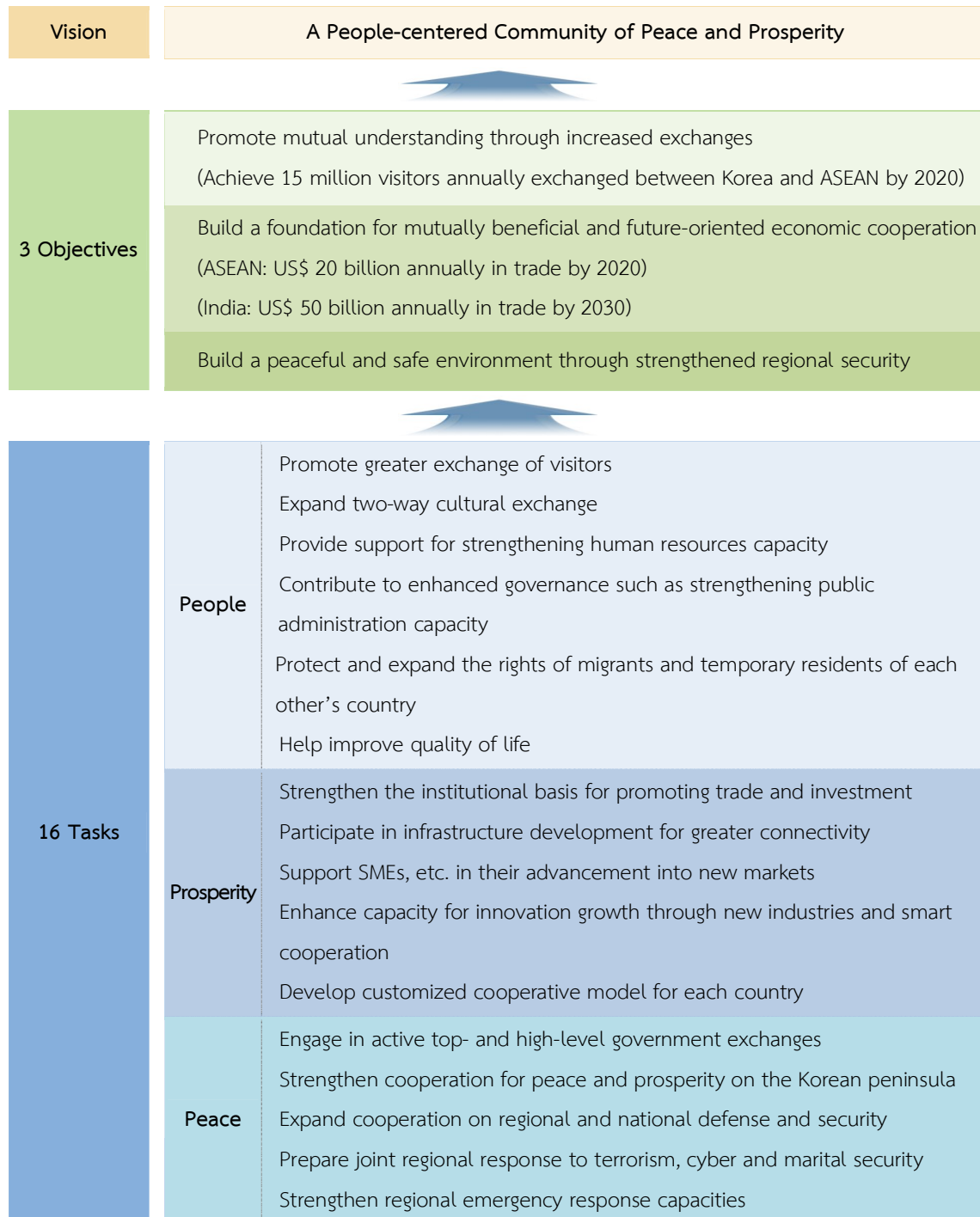


Figure 1 Summary of the New Southern Policy
(Presidential Commission on Policy Planning of the Republic of Korea 2018b)

The New Southern Policy provides many opportunities in terms of diplomacy, the economy, security, and social culture of the ASEAN region. Especially in the socio-cultural aspect, ASEAN represents the region where the power of Hallyu is the most powerful. Hallyu plays a significant role in the formation and expansion of Korea's soft power, which has been gaining a critical role in consolidating Korea's cooperative relation with major ASEAN countries through the New Southern Policy. People (a people-centered community), one of the 3Ps of the New Southern Policy, suggests Korea's intention to gain the hearts of its partner countries through soft power. In this sense, ASEAN countries provide a readily-available and favorable environment for Korean culture and soft power to pervade further through the Hallyu fervor, tourism, and international student exchange. Korea's growing soft power in the region can be used as a catalyst for the success of the New Southern Policy, providing a friendly climate for policy promotion. Kim Hyun-chul, the former chairman of the Presidential Committee on New Southern Policy, had mentioned that people-to-people exchange is the area Korea excels, and accordingly, the Korean government plans to build a 'heart-to-heart relationship' with ASEAN countries by expanding the number of people-to-people exchanges to 15 million by 2020 as well as the number of visitors exchanged based on the power of Hallyu (Kwak, 2018). As one of the major countries considered in the New Southern Policy and the Chair of ASEAN, it is of high interest to Thailand also to build a close relationship with Korea, and the current climate presents a critical opportunity for Thailand to seek mutual prosperity with Korea through New Southern Policy.

1.2 Objective of Research

The purpose of this study is to analyze the New Southern Policy in Thailand and its cultural implications. Specifically, it hypothesizes that the New Southern Policy is an effective policy to enable cultural development of Korea and Thailand and highlight the policy's importance for strengthening the cooperation and economic development of the two countries based on the prior researches and assessment made by Korean government. To this end, this study comparatively analyzes the status of Hallyu in Thailand based on the Hallyu policies before and after the New Southern Policy and assesses the cultural exchange between Korea and Thailand.

The bilateral economic cooperation between Korea and Thailand takes up a relatively low share compared to that between Korea and other ASEAN countries. Vietnam accounts for the largest share as Korea's economic partner. Moreover, the industrial cooperation centering on manufacturing industries such as machinery, electrical parts, and electronics is increasingly being transferred from Thailand to Vietnam where labor cost is lower, putting a halt to the economic cooperation between Korea and Thailand in traditional industries even further. As shown in Figure 1 above, the New Southern Policy's strategies for "Prosperity" include building an institutional basis for trade and investment, actively participating in developing the infrastructure to enhance regional connectivity, supporting small and

medium-sized enterprises (SMEs) to enter new markets, and promoting mutual exchange activities as well as new industries and smart cooperation, and establishing customized plans for collaboration with each country. These measures also take into consideration how Korea's trade and investment can be strengthened in Thailand. Thailand also needs to enhance economic cooperation with Korea to support its two most important policies for economic development at present, which are the Thailand 4.0 and the future industrial sector and EEC development policies.

Thailand and Korea have agreed the "advancement of innovative SMEs overseas" to support Korean SMEs in entering and investing in the Thai market. However, no clear plans have yet been established for the economic cooperation between the two countries, nor concrete policies and measures for mutual economic development, including boosting Korea-Thailand trade and investment. It is in this context that cultural exchange should rise as a priority in the efforts to realize the mutual development outlined by the New Southern Policy. Although Thailand falls behind Vietnam and other major countries in terms of economic cooperation with Korea, it was the first enthusiastic recipient of Hallyu and is the leading consumer of Korean culture. Hallyu has become a key element in the expansion of Korea's soft power, as it strengthens the positive perception of Korea based on the experience and consumption of Hallyu contents and increases tourism as well as the general interest in Korean culture and language. Also, more Korean are visiting Thailand every year to experience Thai culture, contributing to the positive image of Thailand among Korean people.

This study suggests that the development of Hallyu and Korea-Thailand cultural exchange is the first step for the two countries' cultural development as well as economic cooperation. Existing studies on the New Southern Policy mostly consist of government reports, meeting reports, and corporate research papers, and their contents generally reviews current situations and strategies for Korea to further its presence in ASEAN markets, such as the status of ASEAN economy and the promotion of the New Southern Policy, expansions in the ASEAN infrastructure market and strategies for market entry by Korean companies, the Korean government's directives for implementing the New Southern Policy, and Korea's investment in ASEAN nations, etc. There are some studies which touch upon specific ASEAN countries including those analyzing the Korea-Brunei Summit and the tasks outlined by the cooperation under the New Southern Policy; Korea's cooperative measures with Malaysia, Indonesia, India, and Singapore as well as the Bay of Bengal Initiative for Multi-Sectoral Technical and Economic Cooperation (BIMSTEC). However, no studies have yet been conducted on the cooperation undertaken between Korea and Thailand as a part of the New Southern Policy, nor any studies approaching this topic from the cultural standpoint. In this respect, this study contributes to the existing literature by examining the cultural implications of Korea and Thailand through the New Southern Policy.

1.3 Hypothesis

This study suggests that, in terms of the co-prosperous development of Korea and Thailand, Korea's soft power has been strengthened in Thailand since the New Southern Policy of the Moon Jae-in government compared to the period under the previous Park Geun-hye government. This study argues that since the implementation of the New Southern Policy, the cultural exchange of Korean and Thailand has become more active and has contributed to the increase of two countries' interests and positive images held of each other's culture.

1.4 Methodology

To prove the hypotheses set forth above, this study comparatively analyzes the Hallyu policies during the Park Geun-hye administration (2013-2016) and after the implementation of the New Southern Policy under the Moon Jae-in government. Also, the Global Hallyu Trends reports of the two periods are reviewed to understand the status of Hallyu in Thailand, as well as the current cultural exchanges between Korea and Thailand. Global Hallyu Trends is a report published by the Korea Foundation for International Cultural Exchange (KOFICE) based on a survey conducted on overseas consumers of Hallyu contents, which aims to understand their perceptions of Korea and Hallyu, the consumption behavior related to Hallyu contents, and the efficiency of Hallyu, etc. with the goal to identify the appropriate policies and strategies to foster the sustainability and development of Hallyu. For this study, Global Hallyu Trends survey results on Thailand were analyzed. For the review of the current state of Korea-Thailand cultural exchanges, media and company reports were used.

This study has a few limitations that should be considered by subsequent studies. First, this paper looks at the Global Hallyu Trends report published by the Korea institution as its main methodology. This annual report is based on a survey conducted on Thai consumers of Hallyu. However, such opinions cannot be said to represent the overall public perception of Hallyu. Alternative methods such as questionnaires or in-depth interviews should also be conducted to supplement the data. Also, this paper mainly uses Korean literature and no reference from Thailand. There are abundant existing studies on the Hallyu in Thailand and media reports on cultural exchanges. However, recipient countries' research on Hallyu and public opinions and effectiveness of cultural exchange of two countries has so far been quantitatively and qualitatively limited.

The present research explored only a part of the public reactions to Hallyu and Korea's literature and reports on cultural exchange. Thus the paper was unable to investigate deeper into this area of research. Therefore, it will be beneficial for future studies to consider these limitations to contribute further in presenting a new perspective to the body of literature on the Hallyu and the New Southern Policy.

2. The Status of Korea-Thailand Economic Cooperation Korea's Investment in and Trade to Thailand

Korea's investment in Thailand is at the lowest among the ten ASEAN countries. The perception that Japan, which entered the Thai market in the 1970s, prevails in the Thai market, Thailand's unstable political situation, and the blow on the Thai economy by the foreign exchange crisis in 1998 has made Korea to take a passive stance towards investigating in Thailand and entering the Thai market. Table 1, below summarizes the changes in Korea's investment in ASEAN countries before and after the implementation of the New Southern Policy.

(Unit: million US dollars)

Country	2017				2018					
	No. of New Enterprises	Ratio (%)	Amount of Investment	Ratio (%)	No. of New Enterprises	Ratio (%)	Increase/decrease rate (%)	Amount of Investment	Ratio (%)	Increase/decrease rate (%)
Vietnam	697	61.6	1,973	37.5	822	63.7	17.9	3,162	51.5	60.3
Singapore	98	8.7	1,052	20.0	142	11.0	44.9	1,570	25.6	49.2
Indonesia	89	7.9	677	12.9	91	7.0	2.2	497	8.1	-26.6
The Philippines	47	4.2	564	10.7	31	2.4	-34.0	276	4.5	-51.1
Malaysia	61	5.4	280	5.3	55	4.3	-9.8	213	3.5	-23.9
Cambodia	41	3.6	410	7.8	47	3.6	14.6	173	2.8	-57.8
Myanmar	27	2.4	137	2.6	49	3.8	81.5	110	1.8	-19.7
Thailand	63	5.6	106	2.0	50	3.9	-20.6	95	1.5	-10.4
Laos	6	0.5	58	1.1	3	0.2	-50.0	37	0.6	-36.2
Brunei	2	0.2	1	0.0	1	0.1	-50.0	1	0.0	0.0
Total	1,131	100	5,258	100	1,291	100	14.1	6,136	100	16.7

Table 1 Changes in Korea's investment in ASEAN countries before and after the implementation of the New Southern Policy (2017-2018) (Lee 2019, 6)

As can be seen from Table 1, only four hundred Korean enterprises entered Thailand in 2017, which is markedly small compared to the number of Koreans enterprises that sought out the Vietnamese (1,539) and Indonesian markets (718) (Kim, 2019, 39-40).

Regarding investment, in contrast to the more than 60% increase in the investment in Vietnam over the one-year period, Korea's investment in Thailand decreased by 10.4%, marking the lowest investment rate after Laos and Brunei. Japan dominates foreign direct investment in Thailand, forging a stark contrast against Korea's investment in Thailand, followed by Singapore, the Netherlands, and China, while Korea merely stops at 8th place. Also, Korea's investment in Thailand is concentrated on manufacturing (66.3%), while some investment is made in the construction, wholesale and retail, and finance and insurance industries. Thailand's present strategy for attracting investment prioritizes investment to the new and renewable energy sector, then logistics development and science and technology innovation, so Korea's focus on manufacturing does not align well in the larger blueprint for economic cooperation with Thailand.

Trade between Korea and Thailand has also been sluggish. Korea's top 10 exporting countries are China and the US, who take first and second place, respectively, and account for 39.8% of Korea's total exports. Next in line are Vietnam (8.6%), Hong Kong (5.9%), Japan (5.3%), India (3.0%), Taiwan (2.8%), Singapore (2.6%), Mexico (2.1%), and Malaysia (1.7%). Among the ASEAN countries, Vietnam, India, Singapore, and Malaysia are among Korea's top 10 trading countries and are maintaining close economic cooperation with Korea. On the other hand, Korea-Thailand trade accounted for only 8% of Korea's exports and 10% of Korea's imports in Korea-ASEAN trade in 2017, which are rather small compared to Korea's exports to Vietnam (50%), Singapore (12%), the Philippines (11%), Indonesia (9%), and Malaysia (8%), and Korea's imports from Vietnam (30%), Indonesia (18%), Singapore (17%) and Malaysia (16%) (Lee, 2018, 12). Another characteristic of Korea-Thailand trade is trade imbalance. Almost 90% of Korea's exports to Thailand consist of capital goods and intermediate goods, rather than consumer goods. Consumer goods take up only 8.5% of Korea's exports to Thailand, while, contrastingly, more than 20% of Korea's imports from Thailand are consumer goods (Lee, 2018, 5-8). Thailand's outbound trade is highly dependent on China and the US, and the country's imports rely on China and Japan. Thailand's major exporting countries, as of 2017, are China (11.9%), the US (11.2%), Japan (9.9%) and Vietnam (5.1%), and its major importing countries are China (20%), Japan (14.1%), the US (6.1%), and Malaysia (5.4%). Meanwhile, Thailand's exports to Korea recorded US\$ 4.65 billion (1.9%), and Thailand's imports from Korea amounted to \$ 8.14 billion (3.6%), which places Korea as 15th and 6th in rank in Thailand's export and import volume, respectively (Kim, 2019, 39 - 40).

3. Korea-Thailand Economic Cooperation for Prosperity

Thailand's most recent 12th National Economic and Social Development Plan seeks out to pave the country's path to become an advanced country centered on two main strategies. The first is the Thailand 4.0 development strategy (Thailand 1.0 focused on agricultural economy, 2.0 on light industries, and 3.0 on heavy industries. With the aim to move beyond heavy industries, thereby avoid falling into the pitfalls of developing countries and become an advanced country, Thailand 4.0 focuses on the application of ICT to realize smart industry, smart city, and smart people.) which plans for the focused development of five industries (next-generation vehicles, smart electronics, medical tourism, agriculture and biotechnology, and future foods) which combine ICT technology with the five industries Thailand currently has a comparative advantage (automobiles, electricity and electronics, tourism, agriculture, and food). The plan is to cultivate five future-oriented technology industries with growth potential (digital, robotics, biochemicals, medical hubs, and aviation and logistics) for the long term. The second strategy is the East Economic Corridor (EEC) construction plan for regional development. The East Economic Corridor refers to the region including the eastern coastal areas of Chachoengsao, Chon Buri, Rayong, etc., which is at the center of the North-South Economic Corridor (connecting Thailand, Laos, and China). The EEC's geographical position gives it the potential to become a key hub which links the Indian and the Pacific oceans, the CLMV (Cambodia, Laos, Myanmar, Vietnam) and the Southern China region. The Thai government views the EEC as the optimal strategic link between the ASEAN+3 market (Korea, Japan, and China) and Thailand and plans to invest about US\$45 billion in the public and private sectors for EEC development over five years starting in 2017. Plans have been made to construct the Chon Buri-Pattaya Expressway (2019), the U-Tapao International Airport (2023), an express train which connects three airports (Don Mueang - Suvarnabhumi - U-Tapao) (2023), the Laem Chabang Port (2025), etc.

On September 2, 2019, President Moon and Prime Minister Prayut Chan-o-cha signed MOU on cooperation in military intelligence, the Fourth Industrial Revolution, transport and infrastructure, water management and Korean language studies and Smart City initiatives (Techakitteranun, 2019). And on November 26, 2019, Prime Minister Prayut Chan-o-cha visited the 1st Mekong-Republic of Korea Summit in Busan and urged Korean business to invest in Eastern Economic Corridor (EEC) and Korea agreed on investing in 4.0 industries in Thailand in which Korea has expertise. Specific projects with Thailand have materialized as the New Southern Policy emphasize on mutual prosperity through strengthening trade and investment and developing customized cooperative model for ASEAN countries (Son, 2019).

4. Korea's Hallyu Policies and Hallyu in Thailand Hallyu Policies during the Park Geun-hye Administration (2013-2016)

The Hallyu policy of the Park Geun-hye government expanded the focus of existing Hallyu policies from being put solely on the contents industry by connecting Hallyu to other industries. Under the Park Geun-hye government, the Hallyu 3.0 Committee was established in 2014, and in 2015, the Hallyu Strategy Council was launched. The Hallyu 3.0 Committee was a private advisory body whose role was to pave the Hallyu 3.0 era by diversifying Hallyu beyond K-pop and K-drama, the central axes of Hallyu, as well as its recipient countries. A number of experts from the academia and various industries including the journalism and media, broadcasting, Taekwondo, fashion, entertainment, tourism, food, language, travel, modeling, etc., participated as members. The committee sought to serve as a window for gathering opinions of the field and propose various policy for realizing the Hallyu 3.0 era. Among private sector participants, experts from the cultural to service and finance industries came on board, including broadcasting stations (KBS, SBS, MBC, Arirang TV and Gugak FM), movie production and distribution companies (Lotte Cinema), music production and distribution companies (SM Entertainment, YG Entertainment, JYP Entertainment), design-related organizations (Seoul Design Foundation), stage production companies (PMC Production), publishing companies (Ewha Media Center), finance companies (Korea Venture Investment Corp), fashion-related companies (Kolon Industries), F&B companies (CJ Foodville), beauty-product companies (Amore Pacific), convention agencies and associations (Korea Mecenat Association), trade associations (Korea Trade Association), and media agencies (Naver Korea). Table 2, below summarizes the strategic plans set out for major Hallyu projects pursued by the Park Geun-hye government.

Major Projects	Strategies
National brand development	Utilize and develop cultural heritage and spiritual culture Establish platform for participation and expand public participation
Integrated national and government symbol system	Develop basic design through active communication and participation with the general public Apply integrated national symbol system to all government departments
Milan Expo 2015	Globalization of Korean food, Korean Pavilion at the Expo
Further expansion of Hallyu 3.0	Enhance fusion between popular culture and other industries, launch the Hallyu Strategy Council Achieve 10.2 trillion Korean won in Hallyu economic effect

Major Projects	Strategies
Cultural centers and King Sejong Institute	Establish three new cultural centers (in three locations among UAE, Italy, Canada, Singapore) Establish 10 new King Sejong Institutes (140 in total)
Cultural ODA	Expenditure of 12.2 billion Korean won in 2015 (13 projects)
International Exchange and Cooperation	2014-2015 Year of Korea-Russia Exchanges 2015-2016 Year of Korea-France Bilateral Exchanges 2015-2016 Year of Korea-China Tourism 50th anniversary celebration of the normalization of diplomatic relations between Korea and Japan

Table 2. Strategic Plans for Hallyu Projects
(Korea Foundation for International Cultural Exchange 2016, 131)

5. Hallyu Policies under the New Southern Policy (2017-2019)

The Hallyu policy pursued by the Moon Jae-in government runs a different course from those of previous regimes. If the Hallyu policies of previous regimes have focused on spreading and sustaining Hallyu in Asia and the world, the Moon Jae-in government places mutual and interactive cultural exchange at the frontline, rather than a unilateral expansion of Hallyu.

5.1 Hallyu in Thailand Years 2013 - 2017

The overall sense of the 3rd Global Hallyu Trends report published early 2014 was that the popularity and recognition of Hallyu in Thailand had increased significantly compared to the past year. Hallyu contents such as K-drama, K-pop, and Korean movies were gaining increasing popularity, and the overall perception of the Thai people towards Korea was that Korea is "economically advanced" (90.5%), "attractive" (74.5%), "wealthy" (67.5%), "friendly to us" (67.3%), and "a partner rather than a competition" (66.3%). It was also found that experiencing Hallyu contents fostered a higher interest in Korea, such as wishing to visit Korea (83.3%), seeing Korea in a more positively light (69.8%), hoping to experience Korean traditional culture (67%), and wanting to learn the Korean language (50.8%). On the other hand, the popular opinion among those who sympathized with anti-Korean sentiments was that Hallyu was too

commercial. Many also thought that Korea's Hallyu had a significantly larger cultural influence in Thailand than any other culture, its competition being maybe the US or Japan. Hallyu continued to be received positively in Thailand, and this strong positivity improved the image of Korea among Thailand's Hallyu consumers. 54.3% of the respondents knew about the term "Hallyu," showing that more than half of the respondents were aware of the culture. More than 63.3% of the respondents felt that Hallyu stars were influential in commercials (Korean Foundation for International Cultural Exchange [KOFICE] 2013, 439-541).

According to the 4th Global Hallyu Trends report released on November 2014, K-drama, K-pop, beauty, and celebrities were the images that popped up in the minds of respondents when thinking about Korea. Their image of Korea was positive overall, but the degree of positivity had become slightly lower than the 2013 report. The respondents perceived Korea most strongly as being economically advanced (79%), followed by "Korea is a cultural powerhouse," and "Korea is a friendly country." These positive images were found to be stronger among those who had a favorable attitude towards Hallyu. Of the cultural contents consumed by Thai people over a one-year period, Hallyu contents took up 30%, of which K-drama, Korean movies and variety shows, and K-pop accounted for about 50%. Meanwhile, 46.3% of the respondents knew what Hallyu meant, which a decrease from the year is before. Only 29.8% had a favorable attitude towards Hallyu. The Hallyu effect was found to be strongest in attracting people to try Korean products, mainly cosmetics, food, clothing, books, mobile phones, home appliances, and hospital services, followed by the impact on the respondent's intention to visit Korea, purchase cosmetics, and purchase Korean products in general. The largest inconvenience felt by the respondents when experiencing Hallyu contents was the lack of information provided in multiple languages (39.0%, 156 respondents). The language issue was also noted as the most significant obstacle in the previous year's report, showing that the perceived situation has not been improved (KOFICE 2014, 152-182).

The image of Korea held by the Thai people remained unchanged in the 5th Global Hallyu Trends report. Korea continued to be perceived as an economically advanced country and a cultural powerhouse, and the positive image of Korea was stronger among those who consumed more Korean culture contents. The report also identified that people who had a higher awareness of Korea and utilized the internet more often consumed a more considerable amount of Korean contents. The interest in Korean culture and the intention to consume Korean products were higher than before, as well as the awareness and positive reception of Hallyu. Thailand showed a positive perception of Hallyu culture as a whole, and its usage and future interest are higher than those of other countries. Overall, Thailand continued to have a positive perception of Hallyu culture and a higher level of consumption of and interest in Hallyu compared to other countries, and as such, the continued appeal through Hallyu was expected to be effective (KOFICE 2015, 171-202).

In the 6th Global Hallyu Trends report for the period from 2016 to 2017, 77.5% of the respondents perceived that Korea was an economically advanced country, especially among those who consumed K-drama and K-pop contents frequently, followed by the image of being having an influential culture and of actively making in social contributions on an international level. Overall, positive perceptions of Korea had decreased compared to the results of the previous report. The rate of increase in all Hallyu content was expected to be higher in the following year, allowing the prediction that Hallyu's influence will become stronger. Concerning the impact of Hallyu, a large share of the respondents had experience in consuming Korean food, cosmetics, and furniture, etc., and 62.3% of the respondents showed a positive intention towards visiting Korea in the future. The respondents exhibited a high intention to purchase Korean products and services, such as eating at Korean restaurants, purchasing Korean food and cosmetics, and showed interest in participating in Korea-related activities in the order of experiencing Korean food, visiting culture-related fairs and exhibitions, going to concerts, and participating in K-drama clubs. The overall results implied that the higher usage of Hallyu content led to a stronger positive perception of Korea (KOFICE 2016, 143-161).

5.2 Hallyu in Thailand Years 2017 - 2018

According to the 7th Global Hallyu Trends report in 2018, 77.8% of respondents perceived Korea as an economically advanced country regardless of how much Korean contents they consumed, followed by the perception that Korea is a friendly country to Thailand, and Korea is a likable country. K-pop was found to be the top keyword in the minds of the respondents, followed by Hallyu Celebrities and Beauty (cosmetics). 72.8% of respondents said their perception of Korea changed positively after experiencing Korean pop culture; however, 40.3% of the respondents shared a negative perception of Hallyu contents, a significant increase from 23.3% in the previous report. The most common reason behind the negative perception was the exposure to news reports on the division of North and South Korea and North Korea's threats to the international community. Concerning the intention to use Korean products and services, the respondents showed the highest intention to visit Korea, followed by the intention to experience and purchase Korean food. The most popular Korea-related activity was 'Korean food tasting events,' which was the same as the previous year (KOFICE 2017, 157-177).

In the 8th Global Hallyu Trends report in 2019, respondents most highly recognized Korea as 'being economically advanced' (76.8%), and the first thing that came to their minds when thinking about Korea was K-pop. K-pop was the most popular Korean product/service/contents in Thailand. 76.8% of respondents perceived a positive change in their perceptions of Korea after experiencing Korean culture contents. The difficulty and unfamiliarity of the Korean language were found to be the largest obstacle in enjoying Korean drama, movie, and music contents. Among the major issues related to Korea, the respondents

most frequently came into contact with the issue surrounding North Korea's nuclear and missile threats, which was found to impact the consumption of Korean cultural contents in 38.1% of respondents. However, the respondents who have experienced Korean contents continued to show the highest level of intention to visit Korea (KOFICE 2018, 161-189).

6. Cultural Exchange between Korea and Thailand

The 'people-centered community' envisioned by the New Southern Policy is a vision to promote co-prosperity through exchanges of youth and civil society, such as expanding tourism and the intercultural exchange of culture, language, and contents with the new Southern region and improving the image of ASEAN nations beyond industrial and economic cooperation. To realize this vision, various plans were made including large-scale Hallyu cultural events celebrating Korea's partnerships with ASEAN countries; expansion of cultural infrastructures such as cultural centers; broader scopes of activities planned by the ASEAN Culture Center and the Korea-ASEAN Center; expanded exchange of students and civil servants through projects such as scholarships, invited workshops, and training programs for New Southern region's university-level students; support for the cultivation of technical manpower in the field of education and training in ASEAN countries; expanded exchanges of civil servants and private sector experts in each field; support for technical vocational education and training (TVET); creation and expansion of networks and exchanges among civil society organizations; and strengthened support for enhanced governance such as improvements in anti-corruption and public administration systems (Presidential Commission on Policy Planning of the Republic of Korea 2018b, 2-3).

The international exchange through culture sought by the Moon Jae-in government was evidenced in the Inter-Korean Summit and the cultural exchange events held in conjunction with the summit in 2018. Successful performances by the North Korean art troupe in Seoul and the South Korean performing arts group in Pyongyang were the fruits born by the Moon Jae-in government's policy to normalize the frozen diplomatic relations with North Korea through an exchange of culture. Through the New Southern Policy, the Korea-Thailand Foreign Ministers' Meeting in 2018 held in commemoration of the 60th anniversary of the Korea-Thailand diplomatic ties discussed how the two countries can strengthen relations and cooperate on issues such as the political situation on the Korean peninsula, Korea-ASEAN relations, and the Mekong River development project. Korea's Foreign Minister Kang Kyung-wha also urged Thailand to cooperate on the denuclearization of the Korean peninsula and the establishment of peace on the Korean peninsula as the Chair of ASEAN.

Hallyu events such as KCON are often held in Bangkok, which is known as the hub of Hallyu in Southeast Asia. The CJ ENM KCON event featuring K-pop, Taekwondo, and Korean traditional music was

held for the first time in Bangkok, Thailand, and its stage included appearances by Rose Quartz, a girl group with Thai members formed as a joint-project by a Korean and Thai entertainment agency, and the Thai Boy Group 316 which has a Korean member (CJ, 2018). The K-Content Expo Thailand 2019 and 2019 Korea Brand & Entertainment Expo, which aimed to enhance the market exchange between Korea and Thailand through Hallyu, were also held in Bangkok, Thailand. A total of 46 companies from various contents industries, including broadcasting, games, comics, stories, animations, characters, participated in the event and met with buyers from Southeast Asian markets. The Korea Trade Association (KOTRA) also hosted a B2C Hallyu Expo with the added element of cultural exchange such as experience zones, joint concerts with Hallyu stars and famous Thai stars, and exhibitions for local consumers and Hallyu fans. The Korea Brand & Entertainment Expo, visited by more than 10,000 people, showcased Hallyu contents as well as Hallyu-related consumer goods from beauty, fashion, food to daily necessities in the spirit of the "Content Plus Alpha (content + α)" value and underlined the vital role of Hallyu in entering the New Southern region markets (Choi, 2019).

Cultural exchanges have not only been active at the national and corporate levels but also among private organizations and civil society. A representative example is Thailand's Tak Pittayakhom School visiting the Incheon Jakjeon Girls' High School in 2018, followed by another visit by 35 students. The two schools concluded an MOU to collaborate on cultivating understanding of Korean and Thai cultures to foster global citizenship. On the occasion of the Thai school's visit, the students actively participated in the hands-on classes, and during lunchtime, Thai students experienced Korean food culture. Various cultural exchange activities were held including the Thai students' presentation on Thai cultures such as traditional dresses, dance, and language, and the Korean students' traditional gayageum, Nanta, and K-pop dance performances (Seo, 2019).

The passion for Hallyu has also led to a greater interest in Korea as a whole, and there has been a rise in the demand for educational programs related to Korean culture. Notably, Thailand added the Korean language as one of the second foreign languages that students can choose to be tested on as part of Thailand's university entrance examination. At the first university entrance examination which offered a Korean language test option, 5,504 students, among approximately 50,000 students in total, chose to be tested on Korean language, taking fourth place in the number of students tested after the Chinese, French, and Pali language test options. The Moon Jae-in government has been emphasizing Korean language programs as a strategy to meet the growing demand for Korean language and the spread of Hallyu contents, and 180-some King Sejong Institutes are currently operating in about 60 countries worldwide where efforts to introduce Korean culture through Hangul will continue to be made. As such, the role of overseas cultural centers, such as Korea Cultural Centers, is becoming greater than ever (Lee, 2019).

(Unit: people)

Year	Thai Visitors to Korea	Korean Visitors to Thailand
2013	372,878	1,295,342
2014	466,783	1,116,493
2015	371,769	1,372,989
2016	470,107	1,464,218
2017	498,511	1,717,867
2018	558,912	1,612,459

Table 3. Korea-Thailand Tourist Exchange (2013-2018) (Korea Tourism Organization 2019)

Table 3, above tabulates the number of tourists exchanged between the two countries from 2013 to 2018. As can be seen from the table, the number of tourists exchanged by the two countries has been increasing each year, bringing not only economic benefits but also deepening the experience and understanding of each other's cultures among the people. The Hallyu Mall, which opened in April 2017 in Thailand amid the success enjoyed by Hallyu contents among Thai consumers, is now only sparsely visited by customers, showing how the Hallyu = Success equation is no longer valid in Thailand (Park, 2018). The lesson to be learned here is that the unilateral push of Hallyu contents can cause a backlash. Hallyu policies solely focused on self-promotion can easily cause anti-Korean sentiments by creating a perception of Korea's exclusivity to other cultures and, as a result, raise a red flag for the sustainable growth of Hallyu.

7. Conclusion

Former Permanent Representative of Korea to the OECD and the present CEO of the Korea Foundation, Lee Si-hyung (2018), emphasized that the "New Southern policy is a mid-to-long-term policy which expands Korea's limited diplomatic focus on the four major countries and the system of endowing superior status on all areas to a few specific nations, taking into account the changes in the diplomatic environment. Instead, the New Southern policy is an important policy that sets ASEAN Centrality, which places greater weight on Korea's diplomatic relations with the ten ASEAN countries who have been only second in their exchanges with Korea in various areas, as its central value." In addition to strengthen diplomatic and economic relations with the leaders of the ten ASEAN countries through a presidential visit, the Moon Jae-in government has also been strengthening Korea's cultural exchange with ASEAN at

the level of research institutes which lead and support the New Southern policy by providing funding for programs on the Korean language, Korean studies, and Korean culture, running cultural exchange events with ASEAN countries, and assisting with human resource development in the ASEAN region.

This study hypothesized that Korea's soft power in Thailand had grown since the New Southern Policy of the Moon Jae-in administration compared to the period under the previous government. According to the Global Hallyu Trends reports, the influence of Hallyu in Thailand is increasing every year, as well as the consumption and awareness of Hallyu contents and the positive perception of Korea among Thailand's Hallyu consumers. The Moon Jae-in government's Hallyu policy maintains similar lines with the Hallyu policies of the previous governments but places more focus on mutually-beneficial cultural exchanges, rather than a one-way expansion of Hallyu, through the New Southern Policy. The increasing influence of Hallyu in Thailand was evident in the analysis of the Global Hallyu Trends reports, however, since Hallyu had a stronghold in Thailand even before the New Southern Policy, it would be a big jump to the conclusion to say that the enhancement of Korea's soft power in Thailand is entirely due to the New Southern Policy.

However, the second hypothesis set by this study – that the cultural exchange between Korea and Thailand is more active since the launch of the New Southern Policy, contributing to stronger mutual interest and positive image – finds more favorable grounds. The Hallyu policies in the past had promoted the one-way spread of Hallyu, which had led to antipathy towards Hallyu and spurred anti-Korea sentiments against Korea's exclusivity to other cultures, becoming a risk factor for the sustainability of Hallyu. The cultural and people-to-people exchanges based on the vision of a 'people-centered community' emphasized by the New Southern Policy provided an alternative to reduce such risks and even implant a positive perception of Korea and a sure idea of Korea's partnership with Thailand among not only Thailand's Hallyu fans but the Thai people in general.

Through active cultural and people-to-people exchanges between Korea and Thailand can also positively impact the perceptions and prejudices Koreans hold of Thailand, the other ASEAN nations, and multiculturalism as more Koreans experience Thai culture. The mutual cultural development through the New Southern Policy can be a firm basis for Korea and Thailand to become partners in a shared community for co-prosperity and open up a wider horizon for cooperation in many areas including the economy and security. It is anticipated that the New Southern Policy will contribute not only to the development of Hallyu in Thailand but also to strengthen Koreans' interest, understanding, and positive perception of Thai culture, which will, in turn, accelerate Thailand's culture development.

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