


LINE as Super App: Platformization in East Asia

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Abstract

This article examines the transformative effects of platforms on cultural production through an analysis of the LINE “super app.” Super apps are apps that do-everything; mega-platforms unto themselves. They are particularly prevalent in East Asia. Like China’s WeChat or South Korea’s KakaoTalk, Japan’s LINE has evolved from a single purpose chat app to the do-everything platform for everyday cultural and economic activities. It is also the very reason for the global proliferation of stickers or large-size emoji in other chat apps, from Apple’s iMessage to Facebook’s Messenger to Tencent’s WeChat. This article offers a close examination of LINE to highlight and theorize the process of the “platformization of cultural production.” To do so, it traces Japan’s longer history of platforms going back to the i-mode mobile platform launched in 1999, and examines LINE’s regionally specific sticker-oriented strategies in East Asia. With a focus on the entrepreneurial work of sticker designers as cultural producers, this article also mobilizes LINE to both highlight the specificities of this platform and contest the excessive attention paid to platforms from Silicon Valley, or, at best, their Chinese counterparts. LINE and the regional convergences of super apps in East Asia are a potent reminder of the need to analyze platforms outside of the bi-polar hegemony of the United States versus Chinese tech world—which increasingly frames journalistic discourse and academic research—and of the need to attend to the historical and regional particularities of platforms and their cultural impacts.

Keywords

platformization, LINE, mobile apps, entrepreneurship, stickers

Introduction

LINE is a super app, a Swiss-army-style app that pretty much does everything. Like the better-known WeChat (dominant in China), or its other regional cousin KakaoTalk (dominant in Korea), LINE is a chat app turned social media platform launched and dominant in Japan. While debuting as a chat app, it has become a full-fledged social media platform, as well as an integrated services provider. From allowing voice calling (VoIP) and video conferencing, to providing free-mium games, ordering taxis, having indoor maps of shopping malls, becoming a hub for news in Japan, offering music and video streaming services, and affording direct-to-user advertising—there is little that LINE cannot do. It has become one of the do-everything apps particularly prevalent in East Asia. Alongside WeChat and KakaoTalk, LINE is a pre-eminent example of what Nieborg and Helmond (2019) term a *super app*, and what Y. Chen et al. (2018), writing about WeChat, call a *mega-platform*, wherein a single app takes over an array of other services such that it becomes a platform to support all platforms.

We can speculate on the reasons these super apps emerge in East Asia—geographical proximity, a penchant for borrowing each others’ innovations, as well as an “emotional stickiness” (Choi, 2010, p. 118) produced by historical tensions and ties between the nations are an incomplete list of factors. This article highlights some of the historical and geopolitical specificities of this emergence, focusing on LINE and the ways its particularities—its stickers first and foremost—allow us to further develop the framework of the “platformization of cultural production” (Nieborg & Poell, 2018) as an analytic. An assessment of LINE’s effect on content production must also account for the prehistory of LINE, and the platformization that was already taking place before LINE came onto the scene. This emphasis on the national particularity of platform

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history resonates with important work Julie Yujie Chen (2020) has done in the Chinese context. The “ization” in Nieborg and Poell’s (2018) platformization concept implies a before and after; a pre-platform era that is subject to platformization, and a post-platform era wherein cultural production has effectively become platformized. What is striking in the case of LINE, however, is that the pre-platform era in LINE’s development in fact designates an earlier moment of platformization under a different set of conditions.

This historical dimension of platformization must be conjoined with another axis: the geopolitical one. Platforms and platformization have for the most part been recounted from the perspective of dominant American multinationals known collectively as FAANG (Facebook, Amazon, Apple, Netflix, and Google). The global political-economic dominance of these platforms raises questions as to the reach of American capital, social values, and data-gathering, a phenomenon Dal Yong Jin (2013, 2015); has termed “platform imperialism,” retooling earlier discussions of military and cultural imperialism. The corresponding analytical focus on these platforms makes sense, given their near global dominance. And yet, critical though these accounts may be, they risk reaffirming the hegemony of these same platforms at the analytical level.

One response to this situation is to examine local or regional challengers to these US companies, which may allow us to pluralize the accounts of the platformization of cultural production, the platform economy, and platform capitalism (J. Y. Chen, 2020; Srnicek, 2016; Steinberg, 2019). The choice of LINE as a focus in this article allows us to examine one such local platform. This choice is driven in part by the need to address the geopolitics of platformization, without turning to what has become the default for non-US platform studies: the study of Chinese platforms. China’s BAT (Baidu, Alibaba, and Tencent) firms offer a fascinating ground for platform analysis and have rightly been the basis for rich scholarship on their distinct platform ecosystems (J. Y. Chen, 2020; Y. Chen et al., 2018; Li, 2017; Plantin & de Seta, 2019; Poell et al., 2014; Schneider, 2018)—scholarship from which this article benefits. Yet, the bifurcation of the world into the United States (often called “Western”) versus Chinese platforms reproduces a bi-polar world order within platform analyses. We are witnessing the re-emergence of a Cold War paradigm, this time in platform geographies and analysis, reflected in popular journalistic accounts by outlets like *The Economist* (FAANGs v BATs: America’s Tech Giants vie With China’s in Third Countries,” 2018)—to say nothing of the geopolitical tensions that underpin this. Rather than acceding to this neo-Cold War paradigm, its techno-orientalist underpinnings (which de Kloet et al., 2019 and Neves, 2020 also caution against), and the increasingly entrenched misperception of a bi-polar Internet world, this article will examine a fading platform superpower, Japan, through the LINE super app.

This article offers the following account of LINE in hopes of reckoning with the geopolitical stakes of platform analysis, and negotiating the tricky relations between local/

national, regional, and global in this platform era. As a scaffolding for unpacking the specificities of LINE, this article further refines the analytical framework of the “platformization of cultural production,” by parsing platformization into three distinct processes, or moments of formatting. First, platformization transforms existing cultural products or contents, and creates new forms of cultural products or contents.¹ Second, it opens new markets where these contents are sold or exchanged. And third, platformization transforms the subjectivities of the consuming or producing subjects, who are figured as entrepreneurs. The argument here is that by attending to the three aspects of LINE’s platformization in relation to the privileged object of the sticker, we gain a vantage point from which to consider the platformization of cultural production in its specific historical and regional contexts. As we will see, regional difference does not guarantee platform divergence. Rather, in LINE what we find is a combination of a uniquely regional platform with its own character-centric and sticker-based visual logic (difference) and a production of entrepreneurial subjectivity that repeats or syncs up with social logics found in American platforms as well (repetition).

Formatting for Platforms

This article treats platforms as an assemblage of the following three main types: (1) a layered structure often based on hardware (Gawer & Cusumano, 2002; Negoro & Ajiro, 2012; Uemura et al., 2013); (2) a support for contents most associated with social media or user-generated content sites (Gillespie, 2010; Kawakami, 2015); and (3) a mediation-type platforms that enable financial transactions to take place (Evans et al., 2006; Negoro & Ajiro, 2012; Rochet & Tirole, 2003). LINE is a platform in all three senses, being a technological object based on a set of technical hardware or software requirements; being based around the exchange of sticker content; and operating in multiple ways as a mediation-type platform or multisided market (Kalina & Jan, 2016).

We can, in turn, parse the process of platformization into a threefold process of formatting. The first type of formatting is the formatting of cultural goods or contents for exchange on platforms. This is the foremost object of the *platformization of cultural production*. As Nieborg and Poell (2018) write, cultural producers are “impelled to develop publishing strategies that are aligned with the business models of platforms” (p. 4281). Emphasis here is on the shift from existing linear, discrete commodity production, to the rise of the contingent cultural commodity; a distinctly platform-ready form of content. LINE formats the following four principal forms of content: (1) stickers; (2) news; (3) advertisements; (4) games. Stickers are the stand-out feature of the app and will be the focus here. LINE stickers are the reason for the proliferation of stickers on Facebook, WeChat, and other platforms. They are also the site of an array of content strategies

that deftly construct multisided markets, and they are one of the main sources of income for the app.

Second, platforms also call new markets into existence, creating sites of exchange for these newly formatted cultural goods. In the case of LINE, we will focus on the Creators Market wherein amateur producers sell their own stickers.

Third, platforms format new cultural producers and consumers who participate in these markets. The most common articulation of this formatting is in the rise of the entrepreneurial self. Platforms are increasingly central forces in the creation of neoliberal subjects, bringing producing or consuming subjects into being—a process that should also be scrutinized when considering the platformization of cultural production. The formatting of subjects for LINE's Creators Market occurs through the invitation to submit stickers, but also through the proliferation of how-to books for LINE sticker-creation, and the numerous success stories in the media about amateurs who make their living off of LINE sticker sales.

In what follows, this article tracks these three kinds of formatting in relation to the development of LINE, with particular focus on its stickers and character goods: formatting content (sticker packs), formatting markets (through the Creator Market), and formatting producer subjectivity (through how-to manuals of sticker-creation). First, however, I offer a brief prehistory of LINE by way of the Japanese ur-platform, i-mode.

i-mode: A Brief Prehistory of LINE

LINE emerged in a mobile environment profoundly shaped by the earlier hegemony of the i-mode mobile internet system, which was launched in 1999 by Japanese telecommunications giant and former national monopoly, NTT Docomo. Docomo's i-mode mobile internet service dominated for a decade before it was displaced in the 2010s by Android and iOS smartphones (Natsuno, 2011; Steinberg, 2019). Mediating between content providers (news companies, game makers, music distributors), users, and hardware makers, i-mode was a powerful three-sided platform in its day (Evans et al., 2006). i-mode's immediate and immense commercial success made it and Japan the world's foremost example of a successful mobile Internet ecosystem (Hjorth, 2008; Ito et al., 2005). At the turn of the millennium, writers around the globe wrote glowingly about i-mode's enviable mobile ecosystem. Much like China's mobile Internet ecosystem is today, Japan was seen as the world's future for tech journalists circa the year 2000.

i-mode and its mobile internet rivals also created a market for paid-for digital content in Japan, developing a "paid services" model of the mobile internet in Japan, profoundly different from Silicon Valley's data- and advertisement-driven "free services" ethos. Ringtones were the first major market for paid content services, and a significant source of income for the music industry in the early days of cell phone mediated

commerce (Gopinath, 2013; Manabe, 2009). Subscription-based games were another example of popular content.

Natsuno Takeshi (2003b), one of the chief architects of i-mode alongside Matsunaga Mari, describes the system best when he writes, "Mobile and Internet technologies alone did not make it a success. Content providers, manufacturers, Docomo, and our subscribers all interact, influencing each other to create this new service; they are all part of the value chain" (p. xiv). Docomo created and maintained a mediatory platform between users and contents and handset makers, creating a virtuous circle of dependency among them (Natsuno, 2003a, pp. 61–62). i-mode was unsurprisingly a significant influence on the development and rollout of Apple's iPhone and Google's Android smartphones (Enoki, 2015, 182), requiring, as I argue elsewhere, a retelling of the smartphone story and a new emplotment of platform history (Steinberg, 2017, 2019).

The paid-content model of i-mode also accounts for and influenced the success of LINE, which depends on users' willingness to pay for stickers and other digital contents. Moreover, the very idea of stickers is indebted to i-mode. Emoji launched in 1999 with i-mode, and LINE's stickers are a direct development of this (Danesi, 2016, p. 2; Kawakami & Kurita, 2013); both are also inheritors of the longer, pre-digital character culture of Japan (Ernest dit Alban, 2019; Kinsella, 1995; Yano, 2013). LINE takes additional inspiration from i-mode's larger sized emoji for purchase called "deco-mail," which were the visual precursor to LINE's stickers (Kana et al., 2017, p. 4; Natsuno, 2014, p. 84). LINE's careful cultivation of a multisided market of service and content providers similarly tears a page from the i-mode playbook (*LINE daibakuhatsu*, 2013, p. 35).

This being said, LINE's emergence was also dependent on the decline of i-mode, and its displacement by iOS and Android. The entrance of the iPhone onto the scene in 2008 and Android phones soon after broke the stranglehold of Japan's telecoms on the content market and weakened Docomo's and other telecoms' platform power. iPhone's App Store and Android's Google Play became the platform powers that Docomo and its rivals once were. It is amid this shift in power from telecom to OS provider as platform superpower that we find the emergence of chat apps such as LINE, WeChat, and KakaoTalk in Asia, and their eventual platformization. As i-mode creator Natsuno suggests, these apps would have probably never seen the light of day if they had been developed during the reign of the telecoms (Natsuno, 2014, pp. 80–81), since the free messaging and phone services they offer mount a direct challenge to mobile networks' revenue-generating communications services.

LINE and the Rebirth of Chat

LINE was developed by Naver Japan, South Korean Internet search giant Naver's Japanese subsidiary, as part of the second generation of chat apps (the first generation being

PC-based). LINE was in part inspired by Daum's KakaoTalk, which was the first mobile chat app to launch in the East Asia region (Jin & Yoon, 2016). Naver is the top-ranked homepage and search engine in South Korea; it is a portal, along the lines of the still-influential Yahoo! Japan, with which LINE will soon merge. (In 2019, Naver and Yahoo! Japan's owner SoftBank Group agreed to a joint ownership of both LINE and Yahoo Japan, under a new holding company that will contain both companies (Mochizuki, 2019). The merger is expected to be completed in 2020.) NHN Japan, Naver's Japanese subsidiary, initially aimed to replicate the success of Naver or Yahoo! Japan, but failed to capture much of the search market in Japan.² What made its name was the release of LINE in June 2011. Stickers or stamps, the large emotion-like objects that mark the visual culture of LINE and distinguish it as an app, launch several months later, in October 2011.

The official narrative of LINE is that it was created and launched immediately after the 11 March 2011 earthquake-tsunami-nuclear disaster in Japan, known as 3.11, when low bandwidth, data-based communication tools like Twitter were one of the main ways families communicated in the midst of the disaster; they subsequently became a medium for political activism thereafter (Gill et al., 2015; Slater et al., 2012). Nuancing this post-3.11 narrative somewhat, Shin and Ha (2015, pp. 143–144) show that a chat app was already in the works at NHN Japan at the time. More important still, they demonstrate that LINE is a version of a chat app first developed at Naver Korea as an unsuccessful attempt to take on KakaoTalk. The 3.11 disaster lent added urgency to the project, which gained the parent company's firm backing. As such, though LINE is presented as a Japanese company within Japan, the LINE app is more accurately described as a collaborative project between Japanese and South Korean engineers and designers, influenced by both the i-mode model of platform building and the KakaoTalk chat app.

LINE is currently the most popular chat app in Japan, with 80 million monthly active users, which amounts to 60% of the entire population of Japan. It is the dominant messaging app in Thailand and Indonesia, and competes in the Taiwanese, Korean, Malaysian, and Mexican markets as well (Richardson, 2015). Starting as a texting app, it announced its platformization plans as of July 2012, unveiling services (mostly free), contents (mostly paid), and its own currency of payment (LINE coins) less than a year after launch—following the i-mode playbook quite closely. Where it differed from i-mode was its dependence on free-mium games as an income source, a crucial aspect of its platformization strategy.³

LINE operates as a suite of services, with many features built into the main chat app, and other LINE-branded or LINE family services such as games available for download as separate apps. The Japanese version of the app is particularly feature-rich, including a news aggregating service, payment service, a travel booking service, a music streaming service,

shopping, food delivery, taxi hailing, job searching, the LINE Live self-broadcasting video service, and links to LINE-published and branded games. Much like WeChat and KakaoTalk, the LINE chat app aims to become the hub for all digital life, displacing the smartphone OS as the ground or interface upon which the smartphone experience is built. Distinct from the platformization of the web strategy that Facebook takes (Helmond, 2015), LINE aims to contain all the services one needs within the LINE app itself; and increasingly makes its payment system the default option in transactions on the app, as well as other online and in-store payments as well. Unlike Facebook, which platformizes outward by incorporating far-flung sites into its data-gathering ecosystem, LINE as super app internalizes the functions of the web, other apps, and its own complementors, reconfiguring LINE as the *hub or portal* of everyday media life (LINE Corporation, 2017a). This directionality of platformization touches on the geo-cultural specificity of LINE, encapsulated by one of its most crucial objects of platformization: stickers.

Stickers, Characters, Commerce

Stickers are paid for and LINE gains a significant percentage of its revenues from the sale of stickers. Before turning to them, however, we should note a second, increasingly important source of revenue and part of LINE's platformization strategy that deserves mention, since it is closely tied to its sticker strategy. This is its rollout of "Official Accounts"—generally corporate accounts which users "friend" and receive messages from on a regular basis; a strategy which has allowed LINE to increasingly operate as an advertising firm, which in Japan as elsewhere are some of the most profitable and influential actors in the media industry. Like direct mail, these messages promote in-store discounts or online purchases. Unlike other social media giants, these Official Accounts come at a steep annual fee. LINE charges companies for these accounts, with fees calculated on the basis of (1) their number of "friends," (2) the number of messages they send per month, and (3) addition promotions, for instance the creation and dissemination of promotional stickers. Take, for example, the LINE Official Account of online retail giant Rakuten, a Japanese rival to Amazon, which boasts the highest number of friends on the service (LINE@Kōshiki akaunto no tomodachi sū ranking, 2017). It has almost 45 million friends as of August 2018, and sends approximately 4 messages per month. According to LINE's 2018 fee schedule (LINE Corporation, 2018a), maintaining a yearly LINE account would cost Rakuten 189 million yen, or approximately US\$1.7 million, not including the additional costs of publishing its stickers on the LINE platform. Not a huge sum for a massive corporation like Rakuten, but this in combination with the 672 other Official Accounts as of 2018 brought in US\$125 million in revenues in the second quarter of 2018, and amount to some 30% of all LINE revenues (LINE Corporation, 2018b).

Even as ad revenues form an increasingly large part of the LINE revenue pie, its stickers and facilitation of communication between users through stickers are what maintain its status as Japan's premier social media app. They are also credited with the app's exponential growth, following their October 2011 introduction (along with free in-app calling; Negoro, 2017, pp. 86–87), and are one of the most cited features explaining its success in attracting and retaining users (*LINE daibakuhatsu*, 2013, p. 3). As is typical of many chat apps, the service is free for users. Many of the stickers are not free, however, but are paid items that provide a steady income for the app. Being an extension of Japan's intensely character-driven visual culture, these stickers are also a reason for taking seriously the cultural inflections of an app in relation to its host environment. Stickers are part of a longer history of media development and character merchandising strategies that goes back at least to the 1960s, wherein stickers were distributed as part of ad campaigns accompanying the new medium of television animation (Steinberg, 2012). They are also an extension of Japan's booming character-based "cute" (*kawaii*) commercial culture (Gn, 2018; Kinsella, 1995).

LINE's stickers draw on emoji and deco-mail proto-stickers pioneered by i-mode, and on the wider character-centric visual culture of manga, anime, and games, including manga's complex grammar of semiotic signs used to denote emotions (Freedman, 2018). They deploy existing intellectual property from these cultural forms to make sticker packs based on both the familiar (e.g., Hello Kitty and Evangelion) and the obscure. Stickers are sold in "packs" composed of 8 to 40 stickers each. They can be gifted and sent during chats, but cannot be downloaded or used outside the app, ensuring that the images remain within the LINE app, and attached to a single LINE account. Stickers remain an important income stream for LINE.⁴

There are four categories of stickers on LINE. First, there are stickers based on LINE's signature characters, Brown, Cony, Boss, and so on, designed in-house, used as promotional tools for the app and within it, and iconic for anyone familiar with the app. Some stickers of these characters are free, though there are paid sticker sets of these characters too. LINE also mobilizes these proprietary designs to sell physical character goods in its LINE Friends stores. LINE Friends stores are a Sanrio-inspired mobilization of intellectual property (IP) to create physical goods and experiences, conjoining character merchandizing to a play for app dominance (Prigg, 2015). LINE's physical retail business is built around these characters, with flagship stores in Tokyo, Seoul, Shanghai, New York, and elsewhere. Size and scalability have become some of the defining ways the characters have been used within store space to attract customers for a unique retail experience—such as the 3.2-meter high "Mega Brown" plush in Seoul's LINE Friends flagship store in the Myeongdong district. That this move into retail is also a way to create markets where they cannot yet exist—in China, where LINE is

blocked but its merchandise is popular—or where they do not yet exist—in South Korea, where KakaoTalk still dominates—demonstrates the unusual strategy of leveraging character goods to gain platform market share.

Second, there are LINE stickers for sale that are made by LINE, often based on popular existing characters, actors, or dramatic personae. These are tailored regionally, sometimes for IP reasons, sometimes to appeal to national design preferences based on sticker usage statistics.⁵ This means we must acknowledge the emergence of something akin to "big data" or "big character": data-driven character design. Character design itself becomes the subject of algorithmic production, and is, thus, a prime example of the platformization of visual cultural production in Japan.

Third, there are promotional stickers which companies use as advertisement or incitement for their own products. Sometimes available for free, sometimes sold for a fee to users, they come at a steep cost for the companies that make and sell them. Most of the largest Official Account holders create sticker packs. They create these on their own dime but have to pay additional advertising fees to LINE to distribute them. Some become famous in and of themselves, such as convenience store chain Lawson's "Akiko-chan," who is fitted with a Lawson uniform, and sells for US\$1. Expressive, yet also an advertisement, the user effectively pays to use a company mascot as a communicational tool.

The fourth variety of stickers is those made by amateur or professional amateur sticker makers, and is for sale on LINE Sticker Shop, alongside official stickers but often in their own category variously titled Creators Market or Creators' Stickers. It is on this fourth variety of sticker and sticker production that I wish to focus as it speaks to the ways that platformization in the form of LINE has formatted cultural production and the subjectivities of creators.

Sticker Creators as Entrepreneurs

The object of as much mythos as reality, the Creators Market is figured as a site of potential—potential to get famous for some creators, to get rich for others, and a perfect source of side income for yet others. Some creators *have* become famously rich and have quit their jobs because of their LINE income stream, becoming Internet celebrities in the process (Abidin, 2018). That said, this is feted not as user-generated content but as entrepreneurial productivity. In line with the entrepreneurial spirit associated with the selling of digital content in Japan, the making of stickers for the Creators Market is framed as the commercial act of selling rather than as a form of fan production. Launched in April 2014, the Creators Market operates as a marketplace within the LINE sticker shop, allowing for the creation and dissemination of amateur stickers, so long as they are for sale. It is a two-sided market (creators on one side and users on the other side) mediated by the LINE platform. Significantly, there is no "free" option for the Creator's Market stickers. While free

stickers are available from the LINE sticker store from the first three categories listed earlier, creator-made stickers cannot be created and exchanged without a monetary value attached to them. All Creators stickers come at a cost, the lowest of which is US\$0.99, and the highest price being US\$4.99 (LINE Help).

The necessary monetary exchange for stickers formats the Creators Market as a site of market transactions. The successes of a small number of early sticker creators who shot to fame from their creations contributed to a mythos about the Creators Market as a cash cow for makers. How-to books guide potential creators through the steps of learning how to approach sticker-creation, brainstorming ideas for stickers, creating the stickers themselves, and then uploading and promoting them through LINE. At least 15 such books were published between 2014 and 2018, promising to transform amateurs into successful sticker creators. While such guides are by no means unusual in a country where “how-to” books are an industry unto themselves, the number of such guides says something about the market for sticker creators.

As early books on the LINE Creators Market emphasize, *you*—the ordinary person to whom the book is addressed—can make money from selling LINE stickers. In the emphatic testimonial of one successful LINE sticker creator: “A no-name regular person can make money through the sticker business. There is no doubt. It’s true” (Hirose, 2015, p. 8). According to the very same Hirose Takako (2015), to make good money by selling stickers, one has to make stickers that make people want to use them during conversations; stickers that “make communication fun” (p. 23). She backs this up with some figures, which LINE itself published in August 2014, likely as fuel to spur the arrival of new creators. Average revenues over a period of 3 months from stickers within the top 10 amounted to 22.3 million yen (US\$201,000); 12.9 million yen (US\$116,000) for stickers within the top 30; 6.5 million yen (US\$58,000) for stickers with the top 100 (Hirose, 2015, pp. 101–102). Of course, this is before LINE took its cut, which at the time these numbers were given was 50%; it has since moved close to 70%.⁶ Still, this meant an average of 11 million yen over 3 months for those who made it into (and stayed in) the top 10. That being said, the same LINE data showed that only 1.7% of all stickers in the Creators Market made over 2 million yen (US\$18,000), and half of all creators made absolutely no money at all (Hirose, 2015, pp. 103–104).⁷ This difference between sticker rich and poor is stark, implying that the economics of “winner-take-all” is at work in the sticker world, much as Gabriella Lukács (2020, p. 27) finds it at work in digital entrepreneurship in Japan prior to this. Brooke Erin Duffy (2017: 15–16) notes a similar logic at work in the North American context where “just a few digital content creators reap significant material rewards from their activities” and where “media trend pieces” focus on these high earners. This disparity between the sticker rich and poor does not stop Hirose from advocating the value in creating

stickers for the Creators Market, or from touting the possibility of making it rich doing so.

More than simply making money, though, the LINE sticker market has been framed as the pre-eminent place to become an *entrepreneur*. Successful Creators Market sticker maker Tani Yōjirō (2014) frames LINE sticker-making as an introduction to the entrepreneurial life in his aptly titled *Guaranteed to Make Money: An Introduction to Line Stickers as a Side Job*. The book opens with an encouraging declaration: the author wants the reader to understand that “**it is not hard to make money by one’s own means**” (Tani, 2014, p. 3; bold in the original). Many people, says Tani, assume that working for a company, whether as a permanent employee or on a part-time basis, is the only way to make money. But this is not the case. Even novices can make money in a new field, if that person captures the sensibility of this field. Moreover, “for novices to become someone who makes money, the easiest field to approach this in is LINE stickers” (Tani, 2014, p. 4). LINE stickers are the best way to “learn the tricks of making money on one’s own” (Tani, 2014, pp. 4–5).

Tani frames the LINE Creators Market as a gateway into the entrepreneurial life; a training ground to become an independent, enterprising individual. In the book, published a mere 10 months after LINE launched the Creators Market, Tani (2014) asserts that “in Japan today, LINE stickers are the number one easiest product to sell” (p. 34)—a claim repeated throughout the book, demonstrating that Tani’s text, much like the productivity self-help guides Melissa Gregg (2018) trains her attention on, “is quintessentially performative” (p. 55); it operates through repetition of assertions. According to Tani (2014, pp. 34–37), there a number of reasons for this ease of selling stickers, including that LINE has become the “infrastructure for communication in Japan”; that all transactions are all taken care of from within the app, and, therefore, very easy; and that every time someone sends the sticker someone else is introduced to the this sticker pack—sticker use begets sticker purchases. For these reasons, Tani performatively repeats the double assertion that LINE stickers are the easiest things to sell in contemporary Japan, and that making and selling LINE stickers is the best first step toward autonomous earning—a kind of entrepreneurial individualism associated elsewhere with discourses around Uber, Airbnb, and other multisided platforms.

LINE as platform, hence, formats both the market and the subject. This participates in the wider entrepreneurialization of the subject within platform capitalism, under which everyone is a potential entrepreneur. The entrepreneur figure replaces the salaried worker, as the precarious, self-dependent, autonomous subject, promising something like the generalization or massification of the figure of the entrepreneur (Leong, 2018, p. 71). LINE how-to books’ promise that this autonomy *from* full-time work and stability is in fact fun, creative work, echoes similar discourses found in North America and elsewhere, including what Brooke Erin Duffy (2016) describes as the “myriad how-to manuals targeting a new class of aspiring

creative workers” (p. 442). Gregg (2018) notes that in productivity self-help books “time-management training operates at the level of myth as well as ideology” (p. 55). Tani and Hirose’s books, as well as other LINE sticker manuals similarly operate as both myth and ideology—and also as effective training for entrepreneurial selfhood. These participate in the formation of discourses, ideologies, and practices that present creative work in affective terms (Roquet, 2016). They are things you do because you love them, marking “new employment spaces where pleasure, autonomy and income seemingly coexist” (Duffy 2016, p. 442)—a description that neatly fits the LINE Creators Market.

These discourses coincide with the rhetoric of the enterprising individual, so crucial to Uber-style self-entrepreneurship, pairing local Japanese conditions with a platform-mediated and globally diffuse push to entrepreneurialization that is part and parcel of the platformization of cultural production. As Trebor Scholz (2017) writes,

The rhetoric of the enterprising individual is meant to make people feel optimistic about a “liberation” from career and employment and a forced entry in to the world of entrepreneurship . . . All jobs that are solid melt into freelance labor while Silicon Valley exports its playbook to the rest of the world. (p. 14)

LINE’s entrepreneurialization of the subject is surely one part Silicon Valley export, as Scholz implies. But—and this is where I take issue with the platform presentist and American-centric framings of contemporary labor conditions in authors like Scholz (2017) and Srnicek (2016)—it is also, and in equally large part, an extension of the progressive increase in contingent work underway, at least, since the deregulation of the labor market in Japan in the 1990s (Gordon, 2017; Yoda & Harootunian, 2006), and present even during the height of Japan’s economic growth in the 1970s and 1980s in the form of automobile and electronics factories’ subcontracted, precarious labor (Kenney and Florida, 1993). Since the 1980s, temp workers, part-time jobs, side-work, or women’s home work (Lewis, 2018) have become increasingly significant segments of the Japanese job market. This accelerates in the 1990s; while women were always part of a flexible workforce, “beginning in the 1990s, women were also mobilized to mediate labor market deregulation” (Lukács, 2020, p. 26), particularly through dreams of entrepreneurial digital labor.

LINE’s sticker market is, hence, as much a new development as simply another example of the use of precarious labor in place since the 1970s. This is given new life from the 1990s to the present through the concept of the entrepreneur. LINE’s Creators Market displays the scaling-down of the entrepreneur figure from larger-than-life tech figures like Apple’s Tim Cook or SoftBank’s Masayoshi Son to people like Hirose or Tani who create a sticker pack for sale. This involves refiguring or repackaging already gendered batch work as intrepid entrepreneurialism. While not unique to Japan, what Duffy

(2016) calls “the widespread ‘feminization’ of the post-Fordist workforce” (p. 444) is particularly visible there, showing a confluence of existing labor conditions and the rise of platform-enabled entrepreneurialism (Lukács, 2020). That it also coincides in the case of LINE stickers with another aspect of gendered work—communicative labor—is not surprising, and requires further analysis.

Conclusion

Let us review the arguments about platformization and its formatting operations analyzed in this article. First, LINE transforms the object of cultural production, making sticker contents suit the LINE platform. This includes both the formatted, retrofitted production of an existing content IP into the parcelized contingent commodity. It also includes the production of a new form of content—the sticker pack and LINE characters—that while in the lineage of i-mode’s large emoji, also entails the cultural production of new objects for communicational use on the platform. That LINE Friends characters are themselves redeployed as part of a character merchandising campaign with physical stores shows how platformized content bleeds out of the app into a wider thing-media campaign geared toward drawing new users to the platform.

Second, this article pivoted to an analysis of LINE’s Creators Market, and the way this market formats a new economic sphere, where sticker-creation is linked to consumer use through the LINE platform. Third, we saw how LINE’s Creators Market relies on the entrepreneurialization of the part-time creator who produces stickers for this new marketplace. On the one hand, this side job sticker work is an extension of the longer dependence on part-time work within Japan’s industrial model of contingent work. On the other hand, this is also a local conjugation of the Uber-style parcelized work that is mediated by platforms, and in which workers are formatted as precarious self-employed entrepreneurs. This rise of the entrepreneurial subject in Japan is neither wholly a product of Silicon Valley’s exports nor wholly local or national either, but rather a combination of both.

This three-pronged analysis of LINE has, hence, refined the “platformization of cultural production” framework with an eye to raising questions of regional super app specificity. At this point, then, it is worth returning to LINE’s place within the larger geopolitical landscape of platforms. LINE is a fascinating case, insofar, as it is produced by a South Korean Internet company located in Japan. Its location in East Asia in the world’s third largest economy (Japan) finds it squeezed between the geopolitical platform dominance of the US FAANG and Chinese BAT giants, often omitted amid the framing of the world in a Cold War-like division. The rise of LINE comes at a time when its main competitors and influences are the platformized super apps of the East Asian region: KakaoTalk and WeChat. There, hence, is a crucial *regional* aspect of LINE: its mutual dialogue, mimicry, or

isomorphism (Caplan & Boyd, 2018) with geographically proximate super apps, as each adopts the other's innovations, business models and affordances. It also shares with these super apps a visual language developed in part around a regional appreciation of character culture—in the form of their stickers. This comes, moreover, at a moment of transformation of the East Asian region itself in the face of national, regional, and global platforms.

Leo Ching (2000) analyzes the discourse of East Asian regionalism during the 1990s, a decade when Japanese pop cultural soft power blunted the reality of Japan's economic dominance and exploitation of countries within East and Southeast Asia. Ching argues that the regional does not conflict with or replace global capital, but rather facilitates it. Regionalism functions neither as a communitarian substitute for global capitalism nor as local resistance to it, but rather mediates between global capitalism and the nation-form. In Ching's account, the region is as much a function of global capital as the nation-form was traditionally. "Although regionalism may at times appear to oppose globalism," Ching (2000: 237) writes, "the regionalist imaginary is fundamentally complicit with the globalist project".

Ching's analysis holds true within this new tech-based regionalism as well. In this context, LINE is a national or regional chat app within a field otherwise dominated by FAANG and BAT superpowers, using its character know-how to gain a foothold and potentially expand its reach from Japan to East and Southeast Asia. Suggesting the need for a degree of wariness with the platform imperialism (Jin, 2013) framework, which focuses attention on the US platform superpowers, LINE proves the continuing function of regionalism as a mediator for between global capital and the nation state. It also turns our attention to the region-forming powers of media (Ching, 2016; Cho, 2017; Lamarre, 2015; Lobato, 2019). LINE emerges between the cracks of a FAANG-BAT hegemony, and for this reason offers a useful site from which to analyze the specific affordances, techniques of platformization, and impacts of LINE. And yet, what we find in LINE is not so much a countervailing power—a local site of resistance to global capital—but rather a regional player parlaying regional particularities and cultural soft power into local tech dominance.

LINE, then, is a crucial site not for finding the resistance to global capital and its tech giants so much for grappling with local or regional iterations of the platformization of cultural production. The analysis of non-FAANG platforms offers the opportunity to unearth the crucial differences that make national or regional platforms tick, from character culture to i-mode's historical imprint of the paid-for contents model. Yet, equally importantly, the analysis of platforms like LINE also allows us to map the ways cultural logics like entrepreneurialization arise from both global pressures and local labor practices. It allows us to make visible the tricky negotiations between the global, local, and regional, reaffirming the mundane if nonetheless still crucial conclusion

that platformization—like globalization before it (Jameson, 1998)—operates through repetition as much as difference. Yet, this also means that we must always pay heed to the *particular* in our analyses of platformization, including of course the particulars of the FAANG platforms themselves.

The three kinds of formatting that accompanies this process as outlined here offer a way to better parse these particulars to get at what is distinctly regional and historical about platforms, and what is not. Thinking of these processes as both historically and regionally situated reminds us too that the seemingly immutable dominance of FAANG (or BAT) platforms may not be so immutable after all. LINE's dependence on paid-content recalls the longer history of the fading platform superpower, i-mode, reminding us in turn of the historically contingent nature of platform dominance. A platform superpower today may be a by-gone platform tomorrow. The introduction of stickers on Facebook in turn points to the geographical porousness of platforms and the way the "LINE effect" is felt outside of the regional arena of operations of the super app. LINE's simple sticker is a crucial reminder of the continuing importance of analyzing platforms and platformization outside of the seemingly bi-polar hegemony of a FAANG-BAT world.

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Notes

1. It also raises issues of the *discoverability* of contents on platforms, which McKelvey and Hunt (2019) examine.
2. NHN Japan later bought out Livedoor, a once mighty search engine and Internet service provider, in 2010. For an account of Livedoor's impact on the Japanese tech scene, see Oyama (2016).
3. The mobile freemium games model in Japan dates back to transformations in i-mode circa 2006 (Nakayama, 2015).
4. The breakdown of the LINE revenue stream for 2013 was 20% stickers, and 60% for games or in-game items; the 2015 figure was 41% of earnings from games and other contents, 24% from sticker sales, 30% from ads, and a remaining 5% from the smaller e-commerce initiatives (including LINE Pay and LINE Taxi); the 2017 figure put sticker sales at a relatively smaller 18%, though the true financial import of stickers is muddied by the fact that some sticker initiatives would be classified under ad revenues.

5. Interview with LINE Manager of the Sticker Business Planning Team, Watanabe Naotomo, 5 January 2016.
6. LINE's website states, "Creators receive 50% of sticker and theme revenue (after deduction of the 30% fee charged by Apple, Google, etc.)." <https://creator.line.me/en/>; <https://help2.line.me/creators/web/categoryId/20002305/3/pc?lang=en>
7. At this point in time, LINE had a rule that only those who earned more than 10,000 yen (US\$90) over a month would see any income; the threshold has since been reduced to 1000 yen (US\$9).

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