The Globalized and changing landscape of the arts: The era of post-pandemic and civil unrest

PIER LUIGI SACCO

University of Chieti-Pescara
metaLAB (at) Harvard
ISPC-CNR, Naples

pierluigi.sacco@unich.it, pierluigi_sacco@fas.harvard.edu

Abstract

Even before the COVID-19 pandemic shock, the global landscape of cultural and creative production was showing clear signs of a new cycle of globalization, in which the consolidated centrality of US, and more generally Western, cultural and creative production gradually gave way to a more geographically and culturally varied geography, with the emergence of new global players. This chapter considers in particular four main trends: the shifting geography of cultural production; the emergence of participative, decentralized content creation; the evolution of digital mega-platforms; and the tension between democratic and authoritarian forces at the global scale. The red thread behind this rapidly evolving global scenario is an increasing agency given to, or appropriated from, what was previously the passive public of mass culture, also thanks to the new possibilities opened by digital production of cultural contents that dramatically favors a democratization of content production. These bottom-up forms of production prove to be especially relevant in the post-pandemic scenario where culture will likely connect to crucial policy topics such as rebuilding social cohesion, addressing post-pandemic mental health issues, and favoring active citizenship and inclusion. This chapter analyzes the global context, presents some emerging practices, and discusses possible future scenarios.

Introduction: the post-pandemic era as a point of no return for cultural and creative sectors

The global COVID-19 pandemic has had an enormous impact on all spheres of human activity at the economic, social, and environmental levels (Rahman et al, 2021), and likely also at the socio-cultural level although a clear understanding of such changes will only become possible in a medium-long term perspective (Sacco and De Domenico, 2021). In this general context of large-scale system disruption, the cultural and creative sectors have been struck with particular intensity (OECD, 2020). At the root of this problem there are the high levels of fragmentation and extreme incidence of very small and micro firms (Gundolf et al, 2018) and individual freelance professionals (Mould et al, 2014) across such sectors (Comunian and England, 2020). Due to this extreme heterogeneity, policymakers often lack a deep understanding of the complex functioning of cultural production systems (Pratt, 2009), and consequently of the specific needs and characteristics of cultural and creative activities and jobs (Markusen, 2006). The actual levels of welfare protection and economic support provided by different countries have therefore depended upon the specific structure of local creative economies, the relative importance of market-mediated vs. government-funded sustainability strategies, and the actual characteristics of relief packages (Betzler et al, 2021). Moreover, sectoral statistics are often incomplete and flawed by serious definitional and methodological issues (Foord, 2008), that make it difficult to move from an accurate and reliable picture of the status quo.

However, the overall impact of the pandemic on cultural and creative sectors has not been entirely negative. Some important positive effects are also emerging, partly as a result of an imposed service innovation effect which as emerged in several different sectors as a response to the pandemic shock (Heihonen and Strandvik, 2021). More specifically, those sectors whose value creation relies, or can be quickly redesigned to rely, on digital platforms and remote access have responded well and even thrived, whereas those whose value creation depends on access in the physical space have struggled (Jeannotte, 2021). Such tendencies are not likely to exert only temporary effects but will also characterize future trends in the medium-long run, so that each sector's specific capacity to integrate digital elements and to monetize remote access will play an important role in their future evolution (Khlystova et al, 2022). The future evolution of cultural and creative sectors will therefore be characterized by an increasing complementarity between physical and digital dimensions of production and access.

As already remarked, this tendency is clearly being amplified by the pandemic crisis, but was already ongoing before the pandemic shock, so that the latter compounds with other, important drivers that push in the same direction. There is reason to believe that the current transitional phase is not temporary but marks a point of no return with respect to the pre-pandemic status quo, so that the pandemic can be retrospectively interpreted as the triggering shock that moved the system through the threshold of change toward which it was already heading. Putting such drivers into focus and understanding the general picture that results from their complex interaction is therefore key to figure out the future post-pandemic scenarios of cultural and creative production at the global scale. This is the purpose of the present chapter. There are at least four different drivers that need to be considered with attention in this regard: the shifting global geography of cultural production and access; the advent of participative, decentralized content creation; the consolidation and evolution of digital content mega-platforms; and the tension between democratic and authoritarian forces in the shaping of global cultural conversations. We will briefly explore them one by one in the following sections.

The shifting global geography of cultural production and access

For the entire postwar cycle between the end of WWII and the early 2000s, the global geography of cultural production and access has been firmly controlled, both economically and symbolically, by Western countries, and in particular by the US and Europe (O'Connor, 2020). As a result of a peculiar constellation of socio-political and cultural conditions (Wilson, 2000; Bowditch, 2001), Europe has been, historically, the cradle of the patronage regime of cultural production in its full-fledged form (Bullard, 2002). Patronage, in turn, has been essential for the development of the notion of highbrow culture and of cultural institutions such as the museum, the theater and the library in their modern form (Fischer-Lichte, 1997; Battles, 2003; Abt, 2006). The global diffusion of such institutions has been crucially enabled by European colonial empires, as part of a political strategy aimed at establishing the Western models of socio-economic organization as the benchmark of human civilization (Bowden, 2019), and consequently at imposing European values, social norms and lifestyles as an ideal model to be imitated, and to some extent customized, by non-European societies, with culture as a key symbolic marker of this process of assimilation (Bernal, 1994).

The advent of the cultural industry at the transition between the 19th and the 20th century has further consolidated Western supremacy (Jenkins, 2003). There has been, however, a significant shift of the key momentum from Europe to the US. Somewhat ironically, Europe had developed both the social conditions and the technology for the cultural industry revolution (Sassoon, 2006), but the new production regime was basically challenging the vested interests related to the incumbent patronage regime, and primarily those of the cultural gatekeepers who administered it (Shrum, 1996).

The idea of a mass cultural production where the standards of success and legitimization were determined by box office response rather than by critical appreciation was shaking the patronage regime at its foundations. In particular, it was overturning the principle that the experts know better than anyone else what kind of culture should be accessed – and produced with public money (Bourdieu, 1996). For this reason, Europe essentially handed over the innovation leadership in the cultural industry to the US (Trumpbour, 2002). The North American, emerging global power was ideally qualified not only to embrace and develop the new production regime, but also to make of it a quintessential element of its own cultural identity.

The new cultural regime allowed the US to build an idiosyncratic national culture, that was not derivative of the European one, but rather built upon dialectically opposite principles (Huyssen, 1986). At the same time, it was also reshaping the very notion of patronage in new, different forms (Mulcahy, 2003). Moreover, being a cauldron of different ethnicities and mostly European cultures, the new cultural industry allowed the US to build a new shared imagery that could at the same time represent, and offer convenient cultural niches to, all of them at the same time (Powell, 2000), shaping a national cultural identity that avoided the consolidation of an archipelago of culturally parochial, ethno-culturally centered subcultures. Furthermore, the cultural industry provided the US with an ideal solution to the issue of creating a national culture in a geographically vast and dispersed country where technologically reproducible content could circulate much more quickly than non-reproducible content and live performances. A further advantage was that of ensuring that even relatively remote centers lacking major museum or theaters could nevertheless gain a timely access to new cultural content (Tapia, 1997).

In addition, the 'spectacle culture' of the emerging cultural industry, tapping into pre-existing visual tropes, transformed the American landscape itself into a new cultural landmark, strongly identified with American cultural identity (Tenneriello, 2013). Finally, the emerging American business culture could be seamlessly applied to the nascent cultural industry, providing it with sophisticated

business models. This helped the American cultural industry to quickly grow to become the undisputed global content leader (Gomery, 2005).

From a European perspective rooted in the patronage system, a business-driven logic of cultural production was highly controversial; in a sense, the basic rationale of patronage is exactly that of enabling cultural producers to create without having to accommodate the compromises of market demand and to maintain their creative independence and integrity (Bowditch, 2001). Rather than challenging the US on the new ground, Europe therefore did not fully compete for it, only to regain interest in cultural and creative industry and entrepreneurship as an economic growth driver from the early 1980s onward (Lee et al, 2014). This does not mean, of course, that Europe didn't develop its own cultural industry – it rather means that the European cultural industry has traditionally been, unlike its American counterpart, very sensitive to the standards and criteria of the highbrow culture typical of the patronage regime (de Valck, 2016). In European cinema, music, or literature, with the partial exception of the UK which has built a cultural industry that has a closer exchange with the American one for clear linguistic and socio-cultural reasons, critical acclaim counts as much as box office returns, and sometimes more. Excessive market success may be accordingly regarded by peers as suspicious, in that it signals an excessive concession to the demands and expectations of an unsophisticated mass demand (Bauman, 2008). Still today, when cultural industries are in a mature stage of development, these dialectical tensions are still very strong in the European Union, which maintains a distinctive positioning with respect to the American cultural industry. Rather than directly challenging its leadership on global mass content markets except for specific, somewhat isolated attempts, European cultural industries are consolidating their occupation of content niches that are mostly amenable to well-educated, culturally cosmopolitan global audiences (Lewis and Canning, 2020).

This combination of factors provides an explanation of why Europe, despite its social and technological leadership at the turn of the century, handed over to the US the global leadership in the industrial production of cultural and creative content – a crucial turn that is at the root of American soft power in the second half of the 20th century (Nolan, 2015).
Despite that the 'Western' cultural sphere is then much less compact than one would think, and despite the clear gulf between the European and the American production systems, up to very recently the conventional wisdom has been that the West basically ruled the global cultural ecosystem – Europe primarily in its highbrow dimension, the US primarily in the mass culture dimension. Which, in practical terms, given the relative size and economic impact of highbrow vs.

mass culture, amounted to recognizing the US as the global cultural leader, and Europe as its learned appendix (with a correspondingly intermediate positioning for other Western countries, mostly from the British Commonwealth such as Canada and Australia).

This is not to say that non-Western cultures have been generally deemed as irrelevant. In his global survey of cultural and creative ecosystems, Martel (2011) documented how new cultural production hubs had been blossoming practically everywhere, and in some cases, such as India's Bollywood and Nigeria's Nollywood, not to speak of the pan-Arabic content empire built by the Rotana Group, they were quickly becoming major economic powerhouses. However, Martel concludes that all such new hubs, however impressive in their scale and speed of development, were eminently local in scope and would hardly be able to compete with the US for global leadership. A particularly telling example is the brief coverage, and somewhat condescending comments, that Martel devotes to one such instance of a local emerging cultural powerhouse, South Korea. This is a clear example of how the 'conventional wisdom' approach to global content ecosystems has considered non-Western cultural production: as local phenomena that could only be appealing to culturally homogeneous neighbors and whose role in Western cultural palimpsests could be that of (orientalist?) curiosities (Gaupp, 2020), with the US as the sole cultural superpower that could successfully reach a truly global audience. The only partial exception at the end of the 2010s could be considered to be Japan, with the global explosion of the manga and anime culture – once again, however, a niche phenomenon, although very successful with the younger generations, and not a truly alternative cultural industry paradigm in the global context (Kawashima, 2018).

However, the case of South Korea is precisely the example that shows how narrow that view was. Today, South Korea is rapidly ascending to the status of a global cultural and creative powerhouse (Lee and Nornes, 2015), with big American studios such as Disney and key digital platforms such as Netflix opening their Korean country studios and production lines – as business partners rather than as 'cultural colonizers' (Jin, 2021; Ju, 2022), despite that Korea has long been sensitive to the cultural dominance exerted by the US cultural industry (Jin, 2007). A more recent, partial analogue to Martel's book, Pecqueur's (2020) *Atlas de la culture*, draws a very different global picture only ten years after. One witnesses a steep transition from the essentially unipolar vision of Martel to an essentially multipolar vision in which the Far East, and increasingly the Global South, move towards the center of the scene, being limited more by the current availability of financial resources (with notable exceptions such as China, where however the main limitation comes from political constraints to free expression) than from the appeal and vibrancy of their creative production. The

creative contents from the emerging hubs look particularly 'fresh' and attractive if compared to the increasingly repetitive and predictable products of the mainstream cultural industry, which unsurprisingly systematically 'borrows' new ideas and languages from what it considers the cultural fringe, to repackage them in its traditional formats and narratives (Bustamante, 2004).

What is particularly telling is that in the 2010s, when Martel was conducting his global survey, South Korea was already a booming cultural powerhouse, and the Hallyu (the 'Korean Wave') was clearly the coolest new trend in Asian culture. However, such a trend was dismissed, like the others examined in Martel's book, as local, because there was no reason to expect that audiences outside of Asia would find that kind of content of any interest, no more than they did for Bollywood movies. For an irony of history, which is however not difficult to rationalize, the West has been in fact the last geo-cultural area to be taken over by the latest waves of the Hallyu, with the Muslim world widely embracing Korean content when in Europe it was still a niche trend (Elaskary, 2018). The Muslim world offered to Korean content a vast new audience that was well resonating to many aspects of its value systems and was especially interested in exploring content other than mere local remixing of the Western mainstream (Kaptan and Tutucu, 2022).

And in fact, despite that at face value Korean content could be easily mistaken as essentially complying with the Western values of individualistic consumption, as a matter of fact it develops a critical attitude toward the West and positions itself as a counter-hegemonic cultural force (Kim, 2021). Eventually, however, Hallyu is now getting very popular across Western audiences as well, and has become a real global sensation, to the point of having K-pop bands such as BTS topping Billboard charts and co-featuring big Western bands like Coldplay, and Korean movies winning the Oscar for best movie (and not just best foreign movie) as in the case of *Parasite* (Kim, 2022).
It is likely that, despite its exceptional speed and scale of success, South Korea will not be an isolated example of a non-Western country making it to the global mainstream, but rather a pioneer of a new phase in which geographically and culturally diverse voices take center stage. This is mainly, and somewhat inevitably, due to the increasing role of digital channels of content dissemination, and such trend is therefore likely to be further accelerated in the post-pandemic scenario where digital access has become, even more than before, the 'new normal' (or at least a substantial part of it).

We must therefore be prepared for a new global scenario of cultural and creative production in which Western culture is no longer the default choice of most audiences, and where Western

notions of cultural relevance (Rad et al, 2018) and creativity (Sundararajan and Raina, 2015) are not necessarily naturalized any longer. The West is demographically declining whereas the Global South is rising, and despite that financial resources, and thus production capacity, are still mostly concentrated in the West, global audiences are increasingly non-Western. There is therefore a clear competitive push toward broadening the spectrum of content away from Western-centrism (Sommer and Sacco, 2019), and despite that for the moment most of the platforms offering them are Western and could consequently appropriate culturally diverse content as a mere form of product diversification, with the projected growth rates of emerging economies from Asia, and in the future also Africa, witnessing the entrance of big, non-Western digital content platforms in the global arena is only a matter of time (Miller, 2012). The pandemic crisis contributed to a substantial extent to create new habits of digitally mediated access to content also in market segments that were previously mostly focusing on physical access, and this has created new opportunities of exposure for culturally and geographically peripheral voices (Vlassis, 2021). This will likely accelerate the consolidation of a multipolar structure of the global arena of cultural content.

The advent of participative, decentralized content creation

One of the most important innovations related to the digital revolution is the possibility of new forms of increasingly participative and decentralized content creation (Jenkins et al, 2015). Despite the fact that this possibility is clearly enabled by digital technology, it would be misleading to think that such a social trend is the *product* of digital technologies. A social demand for increased social agency in creative content production and dissemination has emerged and has been steadily building up from the countercultural revolutions of the late 50s and 60s onwards, and with the consequent flourishing of subcultures (Jenks, 2005). The typical small-group dynamics that is characteristic of the core members group of a new subculture makes it inevitable that all involved subjects share a possibility of, and an aspiration to, contributing to the definition of the subculture's aesthetics, language, and semantics (Fine, 2012). Therefore, in the subcultural context the usual partition between 'producers' and 'audience' simply blurs down, and as the subculture expands its social reach through gradual processes of co-optation and affiliation, this horizontal logic of content creation persists, only to vanish when the scale of diffusion turns it into a commodified mass phenomenon (Schiele and Venkatesh, 2016). But the crucial contribution of the digital revolution has been exactly preserving this possibility of decentralized contribution even at the large scale (Lin and de Kloet, 2019) – an option that would be impossible through non-digital tools of content creation and access.

The proliferation of digital content 'bubbles' that has been enabled by the digital revolution is therefore an evolution of the pre-digital logic of self-identity building through subcultural creation and participation (Chen, 2016), with the important difference that the intrinsically fluid character of digital interaction makes such bubbles more volatile than traditional, pre-digital subcultural movements, while at the same time allowing multiple, parallel affiliations to different bubbles, favoring the development of potentially 'multiple digital personalities' (Jain et al, 2021). However, the promise of a massively decentralized active digital participation is still unfulfilled to a large extent. Preliminary analyses show that having the possibility to engage in content creation does not necessarily amount to exploiting such opportunity. Online communities are still mostly populated by total or partial 'lurkers' who absorb content produced by others, with a very basic personal contribution or reaction under the form of likes, resharing, minimal comments, and so on.

Most of the content created and shared online is still produced by a relatively small group of digital influencers who are able to shape and orientate global conversations (Sacco et al, 2021). Of course, the actual social dynamics may be extremely complex and difficult to predict without a sophisticated toolbox of nonlinear modeling and simulation tools, so that also the importance of the choices or relatively non-active users in the access and dissemination of content should not be overlooked. However, it is undeniable that the potentially disruptive agenda-setting capacity of massively decentralized digital participation has been only minimally exploited so far, and this is the result of our still limited capability to use digital tools to their full capacity, even at the current state of technological advancement (Bosello and van den Haak, 2022). Moreover, despite that there is a tendency to think that we have socially gained a solid proficiency with digital tools and platforms, we still largely ignore the long-term effects of digital participation both at the micro-scale of human cognition, affect and motivation (Firth et al, 2019), and at the macro-scale of the social dynamics of attitudinal and behavioral change (Chayko, 2008).

The most important critical factors in this context are therefore digital capability building and empowerment. In a digitally-powered knowledge society, even basic digital literacy is not enough to acquire a real citizenship. It is moreover necessary to develop a capacity to become part of an increasingly diverse number of conversations and processes of collective deliberation as new, emerging forms of social governance (Mäkinen, 2006). Human development has been made possible by the social orientation of our brains (Muthukrishna and Heinrich, 2016), that supports the crucial processes of cumulative culture. Being kept out of such social conversations means being

excluded from key resources and opportunities to improve one's sense of meaning in life and wellbeing, educational, social and economic process, and political representation.

The pandemic crisis has clearly exposed some critical points in this regard. The first is the still dramatic inequality of opportunity of digital connectivity: from remote schooling to access to all kinds of knowledge and social resources from home during lockdowns, the social divide between those who have regular and safe access to high-quality, high-speed digital connectivity and those who don't has never been so evident in its social consequences (Katz et al, 2021). Consequently, there is now a growing conviction that fair digital access should be added to the list of basic human rights (Von Braun et al, 2020). The second is that, even in the presence of digital access of good quality, differences in digital capabilities have further widened the gap between those who were able to access crucial resources to cope with the psycho-social effects of the pandemic (for instance, access to quality content to manage emotional overload and mood instability in a situation of constant stress and alert) and those who didn't (Henry et al, 2021). Epidemiologists have clearly warned us that the current global pandemic, even when it will be definitely, and hopefully, over, is likely not the last, and that similar crises will have to be faced in the future, in addition to the likely crises related to the consequences of climate change. Therefore, digital access and literacy should be seen as a critical precondition to a suitably updated notion of welfare, and as an important factor to improve the resilience of our socio-sanitary systems in response to major structural crises.

Once again, we witness major differences at the global scale in terms of quality of digital access and of development of basic digital capabilities, and especially so between the Global North and South, respectively. However, it is also interesting to stress that it is especially in socio-economically deprived areas, such as in most of Africa, that new forms of frugal technological innovation are quickly emerging, developing ingenious solutions to important social challenges but also testing radically new approaches to the building of inclusive content platforms (Madichie and Hinson, 2022).

In the future, we can however expect an increase in decentralized forms of creativity, where individual authorship will be gradually complemented by collective authorship (Bantinaki, 2016), the more so, the more digital capability building and empowerment goals will be reached at all territorial scales. We already have interesting signs of this new trend in traditional, vertical cultural production arenas: for instance, the 2021 Turner Prize shortlisted artists were all art collectives, and the curators of Documenta 15 are an Indonesian artist collective, ruangrupa, who invited mostly

artist collectives – a clear sign that there is a fundamental shift in perspective as to the relevance of collective artistic agency in the new socio-cultural context (Zarobell, 2022). The passage from the institutionalized artistic sphere to the domain of massively decentralized cultural production is neither easy nor obvious, but the trend is set, and it is likely a long-term one.

The consolidation and evolution of digital content mega-platforms

The digital mega-platforms play a central role in the new global ecosystem of cultural and creative content, and it could be natural to think of them as the frontier of innovation in the field. However, this intuition suffers from a lack of historical perspective. In the past, the countries that have been leading the technological innovation behind the emergence of a new regime have not been the ones that became the innovation leaders in content production, as it was the case for the emergence of the cultural and creative industries. This could happen again, and the real content innovation could rather be driven by the latecomers, not the incumbents. Let us see why.

Somewhat ironically, the rapid escalation of the new non-Western cultural superpowers such as South Korea reflects, *mutatis mutandis*, the same deep logic that brought to the US' takeover of the global cultural industry. The US benefited from Europe's unwillingness to tap into the world of opportunity they crucially contributed to create with the industrial revolution and the technological innovations in content reproduction like cinema, photography, and the radio, to make a few obvious examples. Europe clearly made use of such technologies and developed a mass culture, but without bringing it to its most innovative and transformational consequences, preferring to preserve its leadership in the preexisting patronage regime, which evolved into the public patronage of 20th century public cultural policy (Sacco et al, 2018). Likewise, the US have been the major force behind the development of the digital content economy. However, one of the key features of digital content is its fluid character, that fits poorly into the straitjacket of the intellectual property system that has been created for, and tailored around, pre-digital media. As a consequence, to preserve the profitability of their cultural industry, the US have severely limited the development of post-copyright business models and have tried to remodel as much as possible the developmental strategy of the new digital content platforms in terms of the well-established models of 20th century cultural industry (Fuchs, 2011).

Because of this, the business model of virtually all of the digital mega-platforms is based on the extractive exploitation of digital participation. The more people use the platform and provide content, the more the value of eyeballs exposure/customer profiling/social trend analysis etc. that can be monetized on the respective markets (Barns, 2019). What is actually shared on the platform makes no difference insofar as it generates traffic (Myllylahti, 2018). However, it was inevitable that some restriction on content had to be introduced in view of the concerning implications of the proliferation of fake, deceiving and manipulative content of all sorts (Wingfield et al, 2016) – but once again, only as a way of maximizing traffic flows under viability constraints. This means that, essentially, the mega-platforms of today are not interested in becoming enablers of collective action but rather they function as all-purpose containers for individual ego-casting – in a nutshell, the extension of the familiar principle of pre-digital media such as television, where the real restriction that is now lifted is that everybody can have their own bundle of 'channels' to broadcast their daily life, travels, creations, thought, and just anything else, and interact (i.e., create traffic) with those of others (Leask et al, 2014). But any real attempt at using the platform in a massively coordinated, socially transformational way would be immediately seen as a threat, as a potential hijacking of the control over the platform itself. Any kind of transformational collective coordination may only happen at the scale and under the forms decided by the platform designers and administrators.

This is perfectly consequential, but on the other hand it is more of a digital upscaling of the logic of the cultural and creative industries production regime than a real deployment of the potential of digital platforms, where what makes the difference with respect to the past is exactly the power of societal transformation that emerges from decentralized production and dissemination of content. An immediate corollary of this logic is the questioning of intellectual property as the basic principle of governance of content production and dissemination (Menell, 2015) – that is, the very foundation of the value chain of traditional cultural and creative industries. The current mega-platforms have no interest in dismantling intellectual property even when they do not sell the streaming of copyrighted material, insofar as they can provide their users with alternative material which is explicitly engineered to circulate as shareable items (such as memes and user-generated content).

This focus on preserving the status quo as much as possible in terms of the logic of value creation is what prevents the US from being the innovation leader for the next regime, and what is empowering new players such as South Korea to occupy the space that is left available by the US' defense of their incumbent advantage in the old regime. In the case of South Korea, as its emergence as a global content leader has largely coincided with the digital revolution, business models and the

organizational logic of the respective content ecosystems have evolved accordingly. There are in particular two features among many that make a difference with respect to the currently prevailing models. The first is the development of what we could call post-copyright business models. The Korea cultural industry is obviously profiting from the monetization of intellectual property, but strategically one of the main drivers of the global popularity of Korean content is the fact that they are freely available (or almost so) online (Hassim et al, 2019). K-dramas are freely accessible and downloadable hours after their broadcast on Korean TV, professionally subtitled in English and often in other languages. Other forms of content are directly designed for value creation on digital platforms, rather than to deploy digital platforms as a distributional channel, as it happens in the re-adaptation of pre-digital business models (Jin, 2018). K-pop bands are not simply selling music.

They are part of an experience industry which responds to the logic and criteria of digital fandom (Parc and Kawashima, 2018), which offers plenty of opportunities for monetization without the need to enforce intellectual property: live and online concerts, merchandising (fans would not be interested in counterfeited merchandise, they want the original), product placement, etcetera. And likewise for online gaming, and so on.

Being freely distributed online, Korean content has a wide global circulation that facilitates the creation of large national and regional fan bases, paving the way to otherwise implausible business opportunities such as selling of broadcasting rights and increased value of product placement for artists, TV series, etcetera. Without this free online circulation, Korean content would have never scaled globally. Moreover, the high levels of digital literacy of Korean society allow a strong interaction between cultural producers and fans. For instance, in the case of K-dramas, also thanks to the adoption of the live shoot system that allows a partial overlap between the shooting and broadcasting phases, it becomes possible to take into account the direct feedback from viewers in fine-tuning the storyline, the construction and evolution of characters, the emotional valence of the story, and so on, leading to a real process of content co-creation that has had a profound impact on the evolution of the topics, tropes, style and aesthetics of Korean TV series (Lucchi Basili and Sacco, 2020). The combination of these two elements (post-copyright business model and content co-creation with users) is a clear example of the innovation frontier on which the American cultural industry is not just lagging behind, but not even trying, with the result that North American audiences are now being increasingly attracted by natively digital, non-Western content ecosystems such as the Korean one (Jin, 2016).

However, somewhat paradoxically, now that the American cultural industry has recognized Korea as a cultural powerhouse that deserves direct investment, it is trying to push Korean content production models back on the familiar track (Ju, 2020). For instance, K-dramas produced by Netflix are entirely shot before broadcasting, and their free availability online is being progressively restricted. If Korea adapts to the new rules, despite the possible short-term advantages, it also possibly gives up some of the key elements that make Korean content globally attractive in the first place, so that, in the long-term, abandoning the most innovative features of the current model could backfire. Had Korea adopted the mainstream model from the beginning, a partnership with Netflix or Disney would have likely produced a temporary burst of global coolness but little more than that, with the mega-platform moving on to appropriate and maximize value from another source of 'local cool', extending the extractive logic to the content sourcing sphere. Now that Korea has already gained global traction, it could probably maintain it even if folding back to more traditional productive models, at least in the medium term. However, whether or not Korea will persist in the development of their own model rather than complying with the mainstream one, it is highly likely that the next emerging cultural powerhouses will follow the original Korean model rather than the currently mainstream one, as this would be much more effective in the global positioning of the country as a source of fresh, interesting content rather than as a local thematic entry in the catalog of the mega-platforms.

In the full-fledged version of the new, massively decentralized cultural production regime driven by content co-creation, it can be expected that the innovation leaders will be different than the incumbent ones, and there is reason to expect that they could come from the 'Far East' and from the Global South. Once again, the acceleration of online access to content sparked by the global pandemic is already promoting the development of digital content industries in several countries from these regions, and such trends could start becoming globally visible already in the next few years.

Another important driver of change in this regard is the increasingly hybrid digital-physical environments that are being developed in the post-pandemic scenario (Sui and Shaw, 2022). Despite the big ongoing investments in the mainstreaming of the metaverse as the new enabling platform for cultural ecosystems, the role of physical spaces and places remains crucial as many experiences (such as those involving smell, taste, or touch, for instance) cannot be fully enjoyed in a purely digital context (Harley et al, 2018). For this reason, it is likely that the hybridization of digital/physical reality will become another important driver for the consolidation of a multipolar

geography of cultural production in which the attractiveness/meaningfulness of physical locations is strategically complementary to digital platformization and identity.

Democratic vs. authoritarian approaches to global cultural conversations

A last, crucial element of the future scenario is the dialectical tension between democratic and authoritarian regimes in the shaping of global cultural conversations. Countries like China are natural candidates to emerge as future cultural powerhouses, and China's focus on soft power clearly points in this direction (Shambaugh, 2015). However, it is still controversial whether countries which substantially constrain freedom of expression can produce appealing content outside of their closer geographical sphere of socio-political influence. So far, China is essentially producing content for its internal market which, however big and quickly growing (Shan, 2014), does not make it much different from the equally large-but-regional Indian content ecosystem. As there is a dilemma between the incumbent mega-platforms to maintain and consolidate their control on the digital space, there is a parallel dilemma in terms of making content accessible online in a free or restricted way for political-ideological reasons. China clearly has the potential to build a giant content ecosystem at the national scale (Chang, 2009), but its cultural and ideological homogeneity would fatally impoverish content innovation, which essentially thrives upon diversity, not homogeneity. Therefore, maintaining an authoritarian control over content production could imply the impossibility to scale up as a global cultural powerhouse, apart from the possibility of delivering content to other authoritarian governments that restrict choice according to a similar logic. And this would imply, in turn, giving up one of the most powerful, if not *the* most powerful, drivers of soft power. This is of course a problem for all authoritarian governments, and even more so for smaller countries that cannot rely upon an internal market as large as the Chinese one. For some emerging cultural powerhouses such as Turkey that are at a crossroads between authoritarianism and democracy, this choice may be especially crucial in terms of their future opportunities in the global creative arena (Cevik, 2019).

On the other hand, the emerging configuration of the new, multipolar world order in which there is an increasingly clearer contraposition between a democratic and an authoritarian bloc, one cannot take for granted that democracy can be taken as the implicit benchmark of global governance systems. If the conflict further escalates, we could even witness a strong weaponization of culture as an ideological tool of persuasion and mobilization, in which political goals take over economic

ones, let alone creative and expressive ones. And therefore, in spite of all the promise of future scenarios of massive, horizontal co-creation of cultural content, we could also land in a dystopic scenario in which culture is recruited by propaganda in a context of global conflict, as it has happened for significant portions of the past century.

Conclusions

We are living a very turbulent and uncertain historical moment, in which many possible future scenarios could materialize. Global pandemics, climate change, and a return of a possible cold war logic in international relations are rapidly and strongly reshaping our societies and economies, and are changing perceptions, expectations and behaviors in many domains. Culture makes no exception, and it is possibly among the most affected. There is a possible scenario characterized by a multipolar arena of cultural powerhouses, by massively decentralized processes of cultural co-creation, by next-generation digital platforms whose business models and organizational principles are designed around the native characteristics of digital content creation processes rather than upon adaptations of pre-digital cultural industry models, and by a democratic and inclusive global governance that favors cultural dialogue and hybridization guaranteed by free cultural expression and respect of basic human rights. This is to some extent the promise behind emerging Web3 models (Voshmgir, 2020), although a full understanding and assessment of these dynamics is not fully possible yet.

But we could also face a future scenario in which the development of new, emergent cultural powerhouses is thwarted by neo-colonial forms of political and military conquest and control by a small number of superpowers, where cultural participation is organized by extractive digital platforms to favor commodification and monetization of experiences and collective action is practically impeded, and where authoritarian political models embrace an essentially anti-democratic policy of suppression of free cultural expression and appreciation of critical thinking and diversity.

There is much at stake. And possibly now more than ever, culture might make a difference. From the viewpoint of the shifting geography of cultural production, we may expect that multipolarism may favor the emergence of a less centralized and more inclusive global cultural ecosystem (The Collective Eye, 2022). From the point of view of participative, decentralized content creation, we

may expect that moving beyond content creation informed by intellectual property and by the enforcement of individual authorship will favor the development of radically innovative forms of collective intelligence that could improve human capacities to address societal challenges more creatively and effectively (Jones, 2016). From the viewpoint of the evolution of digital mega-platforms, we may expect that the possible emergence of non-extractive, decentralized platforms where users become more aware of the costs and social implications of profiling and digital exploitation will favor more democratic digital governance systems and more inclusive ownership (Cammaerts and Mansell, 2020). And finally, from the point of view of democratic vs. authoritarian forces, we may expect that a more democratic, inclusive, active and purposeful digital participation may favor the transition toward democratic peace as the overarching governance principle of human societies (Richmond, 2020).

Such engrossing, constructive perspectives are, however, far from granted or simple to attain, as discussed by the referenced authors in the first place. The future is still very open and uncertain. But the fact that cultural production, in and of itself, is a very important angle from which to analyze and interpret such trends and the underlying key issues, testifies to the increasing relevance that this once neglected dimension is assuming in the current policy agendas. And this is a first, important milestone in its own right.

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