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There is a paradox inherent in the emerging research field of digital platforms. Most major global digital platforms have more users in the Global South than in the Global North. There are, for example, more YouTube users in India than in the United States. The Facebook audience in Brazil alone is bigger than the combined audience of its three main European markets (Statista, 2023). Yet, the issues raised by digital platforms are usually studied from the perspective of North American or West European experiences, and much less frequently from the perspectives of the countries comprising the Global South. In order to address this gap, we decided to compile this book with the aim of examining the increasing role played by digital platforms in the latter countries, with an emphasis on the cultural issues involved.

In embarking on this project, we were in some respect trying to answer the call, made by David B. Nieborg and Thomas Poell (2018), on the need, when studying how platforms are key players that contribute to the 'reorganisation of cultural production and circulation', to benefit from a 'wider geographical lens' by 'including non-Western' realities in the analysis (p. 4289). However, de-Westernizing research on digital platforms is not an easy task. Indeed, understanding how these platforms participate in the reconfiguring of cultural production and circulation in the Global South requires circumventing the traps of what Anita Say Chan (2013) has characterised as 'digital universalism'. In other words, it is necessary to avoid considering digital platforms as 'models' devised in 'technological centres' that would 'simply come to be adapted and copied' in the Global South (p. x). On the contrary, in order to understand the role of these platforms, the specific historical, but also 'sociopolitical, cultural, and economic contexts' of the countries in which they operate must be taken into account (Milan & Treré, 2019, p. 325). That is why, while adopting the notion of the Global South, we must be careful not to erase the greatly contrasting realities it encompasses. If we choose to use it, it is because this notion remains a relevant and fruitful category for analysing long-term inequalities and power asymmetries on a global scale, provided that those operating at regional or local levels are also taken into account.

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Another pitfall that the study of cultural issues raised by digital platforms in the Global South needs to avoid relates to the very notion of a platform. Admittedly, very precise definitions of this notion have been given. According to researchers in management studies (Cusumano & Gawer, 2002), the central characteristic of platforms is to organise direct interactions between users who can be both suppliers and consumers of goods and services, including cultural content. The emphasis is then placed on the interplay of externalities: the more users there are, the stronger the synergies between users. These externalities are then considered to form a particular market made up of as many 'sides' as there are users. Only multi-sided platforms are in this context considered platforms (Hagiu, 2007). From this perspective, YouTube or Facebook are platforms but not Netflix.

As for platform studies, the emphasis is on the 'programmability' of platforms, i.e. their capacity to host applications managed by external actors who thus benefit from access to the platform's data and functionalities onto which they can graft their offerings. This dual movement towards the 'inside' of the platform (incorporation of external applications) and towards the 'outside' (through the association with external services from which the platform collects data) defines platformisation (Nieborg & Helmond, 2018; Plantin et al., 2018). Here, the emphasis is on the socio-technical functioning of platforms, which allows them to be programmed. In this approach, as in that put forward by management studies, only 'contributing' platforms are considered to be platforms.

In this volume, we do not adopt a restrictive approach to the notion of platform. Indeed, it is clear that the players themselves, as well as the political and regulatory authorities, have a broader approach. They consider non-contributory digital services, such as Video on Demand (VoD) or subscription music streaming platforms, which are at the heart of the reconfiguring of cultural industries, to be platforms. That is why, in this book, a diversity of digital services will be considered platforms when they aggregate, order and editorialise a set of offers of goods and services produced or not by the platform operators, and when consumers can choose between the goods and services provided (as opposed to broadcast media offers, for example) or when the platform operator organises the recommendation of goods and services offered to consumers in a supposedly personalised manner.

Likewise, our approach will differ from works on 'platformisation', in that we will not start from a pre-established 'analytical model' (Nieborg & Poell, 2018, p. 4276) regarding what platforms are or what constitutes platformisation, but, rather, pay attention to the variety of issues raised by platforms depending on the diversity of the local, regional or global platforms involved, and on the specific features inherent to the territories in which they operate. Within this framework, this book includes a variety of detailed studies on the differentiated strategies deployed by specific platforms in order to enter the markets of the Global South. In addition, while emphasising the global

scope of the operations run by the main US digital platforms, this volume also considers the often-neglected active role local or regional actors play in the expansion of those US digital players and describes a variety of local or regional platforms that have emerged in Africa, Asia, Latin America or the Middle East. How do global platforms negotiate with local authorities? How do they work with local telecommunications companies or with the local information technology (IT) and cultural industries? How do they compete or collaborate with other local firms? How do both global and local platforms deal with constraints linked to the informal dimensions prevailing in the cultural economy of many countries in the Global South?

By shifting the focus of the analysis of global digital platforms from their inner specificities to that of the particularities of the local circumstances in which they operate in the Global South, their deployment appears less as a rupture, as it is often portrayed in the literature, than as a particular step in a long historical continuum, as the chapters of this volume illustrate. As such, this book in many ways reconnects the contemporary discussions on the investments of transnational digital platforms in the Global South to the continuum of the heated debates on the internationalisation of Western media and cultural industries in the countries of the South, with all the political, geopolitical, cultural, economic and social issues that these have raised (Thussu, 2018).

The transnationalisation of digital platforms in these countries, as the following chapters make clear, needs in this way to be viewed as being in a continuity of the successive waves of liberalisation that have affected the cultural and creative industries of the Global South. The massive presence of these platforms in these countries – affecting not only their cultural or creative sectors as these are just two of the many economic sectors and social fields that these digital platforms are investing in – has to be seen more particularly as being inscribed in the continuity of the discourse on the 'creative' industries and economy. The latter was indeed presented in the 2000s, notably by UNESCO and UNCTAD, as being key factors favouring the economic, social and cultural development of the countries of the South (Cunningham, 2009). This discourse has in this respect legitimised important developments, including the liberalisation of trade and services – and the subsequent opening of the borders of these countries – as well as the liberalisation of foreign direct investments, or the injunctions for these countries to comply with the rules of intellectual property rights. All these elements have greatly facilitated the current implementation of transnational digital platforms in the South, these being now presented, in turn, as constituting key factors of growth for the Global South.

In trying to discern the issues raised by this massive presence of digital platforms in Asia, Latin America, Africa or the Middle East in some of their complexity, we brought together an interdisciplinary team of researchers – including political economists, socio-economists, geographers, media sociologists or

anthropologists – who each explore these issues through an insightful case study at a different scale – local, national, regional or international. Based on their expertise on the countries and sectors concerned, this volume aims not only to better understand how digital platforms are embedded in global or local power relations but also to better grasp how they participate in a restructuring of the conditions in which cultural contents are produced and circulated in the Global South. Here are some of the major issues and trends that have been identified by the various authors of this edited collection.

Questioning the Power of Global Digital Platforms

The perspective adopted in this book is a critical one, as the emphasis we have placed above on inequalities and power asymmetries illustrates. Our approach is inspired in this respect by existing research that adopts a macro-level perspective to investigate the ways in which global digital platforms constitute hegemonic agents – whether they are seen as vectors of 'imperialism' (Jin, 2015) or of 'colonialism' (Couldry & Mejias, 2019; Kwet, 2019) – within the context of the transnational capitalist system. While the contributions of this research are highlighted by Tristan Mattelart in his theoretical chapter for this book, our perspective nonetheless differs.

As Philippe Bouquillion states in his chapter, this research considering the role of these platforms through the lenses of their 'imperialist' or 'colonialist' endeavours tends to reinforce 'the common idea of their overpowering nature'. This research is not alone in doing so. As Thomas Poell, David B. Nieborg and Brooks Erin Duffy (2022) wrote in reference to these platforms: 'Their power is staggering' (p. 179). However, according to Philippe Bouquillion, while the power of these global digital platforms is, in these works, underlined, the 'modalities and scope of this domination are only partially documented', especially when considering the activities they undertake in the Global South. Understanding the modalities of this domination in fact requires taking into account not only the global structures of domination in which these platforms operate, as Dal Yong Jin (2015), Nick Couldry and Ulises A. Mejias (2019) have done, or the power logics linked to their socio-technical (programmability) or economic (externalities) characteristics, as Thomas Poell, David B. Nieborg and Brooks Erin Duffy (2022) have done, but also taking into consideration the overall political, economic, social and cultural context favouring or constraining, at a local or national level, their investments in the countries of the South.

Indeed, as Philippe Bouquillion shows in his chapter devoted to the investments of the Big Five (Alphabet, Amazon, Apple, Meta and Microsoft) in India, these have not established themselves 'like steamrollers'. They have had to develop localisation strategies in order to adapt to the realities of the target country and they have had, more particularly, 'to form close partnerships with Indian players'. They did it with the Indian central government

which, in the context of the 2015 Digital India plan, has attracted the Big Five in order to fulfil its own 'industrial policy objectives'. They also have had to partner with Indian industrial players, especially the main Indian telecommunication operators, without which they would not have had access to the national market. Despite their financial and infrastructural power, these global digital platforms have then had to cope with these domestic players' own priorities, including in the political field. Far from the platform euphoria prevalent in the early 2010s, which celebrated these companies for being promoters of democracy, they have thus had to deal with India's 'government attempts to control the political public space'.

Beyond the Indian case, most of the contributions gathered in this book show how platform operators have had to deal with local players or local subsidiaries of foreign players and particularly with mobile telecommunications operators in order to invest in the countries of the Global South. Indeed, access to connection networks, to reception equipment and payment solutions – especially through mobile phones – is still an important issue, albeit to different extents in the different countries under consideration, and depends to a large extent on these telecommunications operators. The latter are also key business partners because the potential users of the platforms' services are already their subscribers.

This is not to relativize the power of the global digital platforms, but to try to understand better how they negotiate it and, ultimately, how they exercise it. In her chapter in which she studies the investments of e-commerce platforms such as Amazon and Walmart-owned Flipkart in the craft sector of two Indian states, Assam and Tamil Nadu, Christine Ithurbide also highlights the key role played by domestic players in these processes. She shows more specifically that regional state structures have been 'nodal organisations in the expansion of [these] e-commerce platforms' by making it possible for the latter to access the rural craft communities in the two states under consideration. These state regional structures have been all the more inclined to introduce these US e-commerce platforms into this craft sector since, as Christine Ithurbide explains, they have been 'seduced' by the discourse that these US companies hold, replete with promises of modernisation. There is, however, a huge gap between these promises and reality, given the limits of online connectivity and of digital literacy, to name but a few obstacles with which these platforms are confronted on the ground.

The investments of these global companies have nonetheless had a tangible result, as Christine Ithurbide notes. Under the impetus of these public-private partnerships, 'tasks that were once performed' by public entities, 'from training to building marketplace', have tended to be 'delegate[d] to private players'. By emphasising this, Christine Ithurbide brings to the fore one of the main features characterising these platforms' operations: their ability to extend the borders of the market by including, within its sphere, activities that used to be largely excluded from it.

(Re)structuring Social and Market Spheres

This argument is also made by Vibodh Parthasarathi and Simran Agarwal in their chapter. As they explain, the 'platform phenomenon' has to be seen not as a 'rupture' as it is often presented, but as an 'evolutionary process' that 'reformulate[s] and institutionalise[s] novel forms of market systems'. It does so by taking over activities that were previously the responsibility of public authorities, as in the example of the craft sector in India already mentioned. It also does so through the 'capture', undertaken by these companies, of the Global South's 'informal and social economies'.

In this respect, Tristan Mattelart mentions in his contribution the efforts made by the main US global platforms to exploit the important resources of this informal economy to their advantage. However, US companies are far from being the only ones seeking to take advantage of these resources. When considering the role digital platforms play in the Global South, it is indeed important to avoid focusing exclusively on US platforms and necessary to take into account the ones that emerge locally or regionally, 'sometimes in the cracks between the platform superpowers and sometimes before they arrive' (Steinberg & Li, 2017, p. 175). These local or regional platforms are not less involved in the expansion of the market sphere in the Global South and no less eager to appropriate the potential of the informal economy.

The chapter that Alix Bénistant and Jeremy Vachet devote to cultural crowdfunding platforms in Latin America illustrates very well how, with the creation of both local and transnational platforms, various initiatives have been taken, by both public and private institutions, to include activities that used to be largely excluded from market logics (or, more precisely, sometimes from formal market logics) within the latter's realm. They indeed show how the discourse of global institutions on crowdfunding, which describes these platforms as being key instruments for development, has been 'indigenised at the national level' in Latin America, and how it has shaped public policies. Crowdfunding platforms are, in this perspective, viewed as a means of mobilising the untapped resources of the informal economy prevalent in Latin America and, more specifically, as an instrument able to stimulate small and medium-sized enterprises by offering them access to formal alternative funding channels able to overcome their exclusion from the traditional banking system. The cultural sector is, within this framework, identified as being particularly strategic and considered, in line with the global creative economy discourse, a key 'inclusive tool for development'.

Through their analysis of the public policies implemented in Latin America in this field, both at a regional or national level, Alix Bénistant and Jeremy Vachet demonstrate however that, by promoting these cultural crowdfunding platforms, domestic public authorities actually seek to reduce the share of public funding devoted to culture by fostering the development of the 'private sector – small entrepreneurs – in order to stimulate local [cultural]

production'. Interestingly, their chapter, like Christine Ithurbide's, highlights the significant gap existing between the promises in the discourse on digital platforms (here, cultural crowdfunding platforms) and reality. As a matter of fact, despite the celebratory discourse on cultural crowdfunding, the latter's 'business model seems unsustainable', note Alix Bénistant and Jeremy Vachet.

Another illustration of the ways in which both the US and local platforms play a key role in capturing the informal and social economies in the Global South is provided by the chapter written by Vibodh Parthasarathi and Simran Agarwal. Studying Indian brokerage platforms such as Shaadi.com and Bharat Matrimony, or dating platforms such as the US-based Tinder or the Indian Truly Madly, they show that these have not simply added another intermediary in the field of matchmaking in India, in addition to those already existing offline or online. Beyond, these platforms have appropriated 'the variedly informal practices of matchmaking to make them more legible to users and garner rents for proprietors'. By doing this, these platforms have integrated these informal practices within a broader matchmaking market of which they are a central node. A market that is all the more extensive as it includes within its realm the Indian diaspora.

This logic is also at work in China. In her contribution, Yuwen Zhang indeed shows how Weixin, owned by the tech giant Tencent, has succeeded in becoming a central support for various socialisation practices in the country and, in doing so, has succeeded in integrating these into the Chinese market sphere. 'As it expanded, [Weixin] has transformed and accumulated new functions, to the point that it seems today to be almost indispensable to Chinese society'. Being at the heart of Chinese 'social interactions', this application, with its 'scenarios' strategy, in effect encourages its users to make use of the device in as many social configurations as possible to meet the various needs of everyday life. 'Today, a Weixin user can chat with his friends, publish content, make online purchases, buy from any store in China, play video games, or even perform administrative tasks with the prefecture. When they move around, thanks to Weixin, Chinese people only need a cell phone', Yuwen Zhang explains.

Interestingly, the embedding of Weixin in Chinese socio-cultural realities nonetheless hinders its development abroad insofar as the move from Weixin to WeChat, its international arm, has hardly changed the device. WeChat expansion in India has, for example, not taken into account the fact that Indian users have not been accustomed to chatting only after sending and accepting friend requests, or more technical issues in relation to smartphone versions not being able to support WeChat's services or default compression of images to save traffic costs. As such, the Indian WeChat appears more like a product built entirely for Chinese users but with a changed language version. Thus, while the users of the main global US social media platforms are from a wide variety of countries and regions around the world, with the exception of a few countries, WeChat's international users are mainly Chinese people overseas.

US SVoD Platforms in the Global South, Between Localisation Strategies and Liberalisation Policies

As explained above, despite the fact that Subscription Video on Demand (SVoD) streaming services are sometimes considered not to be platforms (Poell et al., 2022, p. 6), we choose to include these within the scope of this book, with several chapters dealing more specifically with Netflix's investments in Latin America and the Middle East or, somewhat more indirectly, in Nigeria. With the arrival of major US SVoD players in these countries, questions that echo older debates have resurfaced: Are US platforms easily acquiring a dominant position in the countries where they enter? What is the impact of their arrival on local industries and, more specifically, what are 'the outcomes of the conflict between new corporate actors and older industry stakeholders for the future of the industry?' as Alessandro Jedlowski asks in the case of Nigeria.

A first observation is that Netflix is leading the local markets under consideration, although not systematically. In Latin America, as Luis A. Albornoz and Fernando Krakowiak explain, Netflix has been able to position itself as a leading streaming service in several key countries, including Argentina, Mexico, Colombia, Chile and Peru. However, in the case of Brazil, it is the local operator GloboPlay that dominates the market with almost twice as many subscribers as its US counterpart. Netflix also leads in terms of subscribers in the Middle East against its main regional rivals, the Dubai-based Shahid and the Abu Dhabi-based StarzPlay, as shown by Joe F. Khalil and Mohamed Zayani. It must be noted, nevertheless, that in other key markets in the Global South, such as India, Netflix is far from leading the market, confronted as it is with tough competition from both the other American players, Amazon Prime Video, Disney+ Hotstar, and from established local platforms, JioCinema and Voot (Bouquillion & Ithurbide, 2022).

The study of the transnationalisation of US-based SVoD platforms, and more specifically of Netflix, is interesting in that it shows how, in order to invest in markets in the Global South, the company has needed to implement localisation strategies, as the other types of platforms have done, implying adjustments both in its content and partnerships. As Luis A. Albornoz and Fernando Krakowiak show in their chapter where they review Netflix's first decade of investments in Latin America, in order to expand its presence on the subcontinent, not only has the company had to partner with telecommunications companies (with the Argentinian Telecentro or with Telefónica, the Spanish company present in several Latin American countries), but also to shift its activity from merely content distribution to the production of local programmes, at least in some of the major markets in the region. Similarly, Joe F. Khalil and Mohamed Zayani, who study in their chapter some of the major streaming platforms operating in the Middle East, analyse how, in a market where 'Hollywood movies and series continue to appeal to local

audiences' but where there is an 'even greater demand for original productions in Arabic', Netflix has had to invest in the production of local content.

Interestingly, both chapters use relatively similar terms to describe the ways in which, through this production of local programmes, Netflix also targets a transnational audience living well beyond the regions under consideration. In Latin America, this company strives to achieve a 'cultural mix nourished by features of local identities along with certain global themes to facilitate its internationalisation'. In the Middle East, the streamer tries 'to create successful programming that resonates with global audiences while remaining true to the local culture'.

However, this strategy of localisation seems to have encountered more obstacles in the Middle East than in Latin America. Indeed, as it started its investment in 'original' content 'with little concerns for the region's production structure's cultural, political and economic complexities', some Netflix locally-produced content, considered to contravene 'Islamic values', has attracted significant criticism, forcing the company to make public amends. Not to mention the problems the streamer also had in the Middle East with the presence, in its catalogue, of programmes with political content considered to be sensitive by the governments in the region.

Contributing, at least in some countries of the regions under consideration, to the production of local content, Netflix has been able, as Luis A. Albornoz and Fernando Krakowiak note, 'to defend itself against accusations of being part of a new imperialist crusade'. Does this mean that Netflix should be uncritically considered a benefactor for the local film and TV industries in the countries of the Global South where it has deployed its policy of original productions? That would be forgetting that the relationship Netflix establishes with local producers, as Luis A. Albornoz and Fernando Krakowiak underline, 'is a markedly asymmetrical one'. As a matter of fact, the US company retains control over the international distribution of these locally-produced programmes, but also over the ownership rights and the non-negligible ancillary rights to these programmes. Moreover, through these local investments, Netflix exports a very specific way of conceiving programmes, crafted in California, which, once imported, contributes to the implementation of new modes of organising the production of content (Bouquillion & Ithurbide, 2021).

While the acquisition of films' or series' rights and investments in local production are non-negligible aspects, they also raise fears and come with certain imbalances and limits. In his chapter devoted to Nollywood, Alessandro Jedlowski reminds us that Netflix's 'intentions for investing in African cinema […] are seen as dubious and its economic power as excessive' in Nigeria. There are too, significant gaps in the number of originals produced between one country and another. For instance, in 2022, Netflix produced 70 'originals' in India, less than 50 in Brazil and in Nigeria, to no originals in Sri Lanka or Mauritius. Budgets also vary widely: the amount of money used

to produce a season of eight episodes of a series in India would make a single episode in the US (Ithurbide, 2022), a situation that underlines persistent geographical inequalities.

Beyond that, what needs to be taken into consideration is the way in which the entry of Netflix in the Global South has resulted in an increased liberalisation of the audiovisual markets of these countries. Luis A. Albornoz and Fernando Krakowiak emphasise in this respect the efforts undertaken by Netflix in Latin America at a regional level, through its lobbying, to influence regulators in a way that is favourable to its interests, by calling for a strengthening of the 'market dynamics', at the expense of interventionist public policies.

Brazil is a good example of a market that, after the arrival of Netflix, has been largely deregulated. Leonardo De Marchi and Ana Atem Diamante explain in their chapter how, under the centre-left coalition led by Dilma Rousseff, the Superior Council of Cinema, responsible for formulating a policy in the audiovisual sector, and the National Film Agency tried, in the mid-2010s, to regulate the activities of VoD platforms, attempting, inter alia, to impose quotas of Brazilian titles on their catalogues and to require investments in the production of domestic works. They show how, with the impeachment of Dilma Rousseff and the subsequent election of Jair Bolsonaro, this attempt at regulation has failed, resulting, to the contrary, in 'a scenario of complete deregulation' of the VoD sector.

This failure is all the more damaging since the rise of SVoD subscriptions in Brazil has been accompanied by the decline of those for pay television. Now, this pay television market had been regulated, with mechanisms forcing pay television operators to distribute Brazilian programmes, including from independent producers, through quotas. With the SVoD market being free of such rules, these regulations organising the pay television market – which had 'resulted in the development of many small and mid-sized independent producers across the country' – are increasingly being questioned by pay television operators, especially as they face declining subscriber numbers, making the situation of these independent producers more and more precarious.

Local Streaming Platforms, Between Collaboration and Dependence

Beyond US streaming services, what clearly emerges in this book is a constellation of other players that provides a much more complex and nuanced picture than the one of a US steamroller. Every country presents a more or less important diversity of 'local' or 'indigenous' platforms which pre-existed to or have emerged in parallel with foreign ones. These local platforms have been launched by two different types of players: the ones coming from the legacy cultural and creative industries (such as film companies, pay television or music labels) and the others whose main activity is related to information and communication technologies (such as telecommunications operators or

digital service companies) or finance (banks), and who aim to diversify their activities into cultural content for different strategic reasons. The size or the financial and technological capacities of these local players vary greatly, not only amongst them but also in comparison with US corporations who have some of the world's highest market capitalisations.

The two local or regional music streaming platforms that are more specifically studied here, Anghami and ZikMali, are indicative of the great diversity of situations existing in this field. Beyond their many differences, both strive to cater to the specific needs of their audience. As Joe F. Khalil and Mohamed Zayani demonstrate in their chapter, if Anghami, based in both Beirut and Abu Dhabi, has been able to compete with Paris-based Deezer or Stockholm-based Spotify, it is certainly thanks to 'its deep familiarity with the region'. They show indeed how this streamer has succeeded in establishing itself in a 'piracy prone regio[n]', thanks to its catalogue – enriched by a licencing deal with Rotana, the Middle East's biggest music producer – but also by establishing relationships with more than 30 mobile operators – mobiles being a major means for accessing music in this market – or by adopting a '"freemium" pricing model' ensuring the growth of its user base, or by promoting a policy of producing local artists and, finally, by creating a 'user interface tailored to the local audience'.

The Malian streaming music platform, ZikMali, whose development Emmanuelle Olivier chronicles, has a far more artisanal nature. She highlights the lofty ambitions of its creator, Mohamed Diarra, who wants to struggle against the 'marginalisation of Africa[n]' music on international streaming platforms and to enable Malian musicians to have an additional income 'thanks to dividends from the consumption of their recorded music' on his subscription-based national streaming platform. Emmanuelle Olivier details the many obstacles Mohamed Diarra has faced in implementing his project: the difficulties he has encountered in collecting the older recordings of the artists with whom ZikMali has contracts, or, even worse, the difficulties he has met in convincing Malian consumers – who, in another piracy prone market, are not used to paying for listening to recorded music – to subscribe to his streaming service or to download songs. Without also forgetting of course the inherent limitations related to the poor online connectivity or digital literacy in Mali, to name but a few obstacles. As a result, ZikMali's achievements are mitigated, the number of subscriptions remaining low and being 'primarily limited to Malians living abroad'.

Interestingly, while tracing the development of ZikMali, Emmanuelle Olivier also deciphers some of the mechanisms through which mobile telecommunication operators exert an increasing power over the music sector in Africa. These operators have indeed, since the early 2000s, invested in the music business on the continent, integrating this with the other so-called value-added services they offer on mobiles, which generate 'vitally important' revenues (Eisenberg, 2012, p. 1). Elsewhere, Emmanuelle Olivier has more

particularly analysed how Orange, the French telecommunications company, has invested, through a series of deals with local actors, in the development of music content in Mali in order to 'augment the sale of its phone bundles' and to develop m-commerce – i.e. the lucrative mobile commerce – for its own benefit (Olivier, 2017, p. 192).

Within this framework, her chapter helps to understand the extent to which these companies are, in Africa, and more specifically in Mali, not just mobile telecommunication operators, but in the process of 'becoming cultural operators'. As a matter of fact, in the musical field, they are, as she explains – in line with an argument we have already made above – trying to reform 'the largely informal modus operandi' within which the Malian music market has functioned until now, transforming it into a formal market, organised largely by their platforms and increasingly monetised on these.

Emmanuelle Olivier shows more specifically that the project of ZikMali could not have been born without the support of Orange: the former has indeed depended to a considerable extent on the latter to come into being. Not only did the mobile operator give ZikMali the means to access its mobile phone payment service – a key element in a 'country as poorly banked as Mali' – but it has also helped Mohamed Diarra in designing his project by opening the doors of its own start-up incubator and support centre to him, where he has been able to refine his strategy.

While in Mali Orange has played an instrumental role in making the ZikMali project possible, in Nigeria, YouTube has in many respects facilitated the emergence of various generations of streaming services devoted to Nollywood movies, as Alessandro Jedlowski shows in his chapter. He explains first how two Nigerian UK-based entrepreneurs, Jason Njoku and Bastian Gotter – after having purchased the streaming rights for films at a low cost – created in 2011 the YouTube channel 'Nollywood Love', which evolved into the establishment of one of the most popular streaming platforms in Nigeria, iROKO.tv. The success of the latter has pushed international corporations, such as the satellite television companies South African Multichoice, the French Canal Plus, the Chinese StarTimes, as well as the streaming services Netflix or Amazon Prime, into the local Nigerian market, which resulted in the transformation of Nollywood's industry. The arrival of these international corporations has indeed marginalised the 'marketers' who had occupied a central role in the early Nollywood economy, with its largely informal features, to the benefit of a 'new generation of producers and distributors', more likely to adhere to the requirements of these international corporations that target more profitable Nigerian audiences, such as the urban elites or diaspora, who have the means to pay for a subscription to a pay television or streaming service. However, as Alessandro Jedlowski shows, YouTube, the same platform that indirectly contributed to the marginalisation of these marketers, has also, thanks to its infrastructure, given them the means to create channels – some even dedicated to local languages (such as Yoruba Plus or Igbo Eze) – which cater to the particular needs of their more popular

local audience and which are, thanks to their ad-based model, more accessible. As argued by one of Alessandro Jedlowski's informants, who has been producing and selling movies since 2003, and shifted to online business with a YouTube Channel, 'Global Update Movie Nollywood', with this platform he can operate 'without the interference of the Nigerian government or the big international corporations!' … but with the help of one of the biggest corporations in the world.

New Forms of Cultural Entrepreneurship

While not without limitations – in Mali, YouTube channels cannot be monetised – global digital platforms have undeniably brought about a new space for cultural production in the countries of the South. In Nigeria, YouTube, for example, has not only helped some of the marketers who had played a key role in the emergence of Nollywood to continue in their business, it has also favoured, as Alessandro Jedlowski explains, 'the emergence of new talents', providing to 'young, upcoming filmmakers' in the early stage of their career the means to produce and circulate their short films, thereby helping them in circumventing 'the monopolisation of the existing distribution networks in few international corporate hands'. Moreover, this company has given them a venue for engaging with 'more politically-sensitive topics, which are largely absent from mainstream Nollywood releases'.

However, digital platforms cannot be viewed merely as facilitating cultural production. Beyond that, the different chapters comprising this book show the extent to which contributory platforms need to be considered, in many respects, 'cultural operators', to use Emmanuelle Olivier's expression, which play a central role in various stages of the production of creative contents. These platforms are indeed far from being neutral intermediaries making the production of culture easier. On the contrary, they promote, on a global scale, as Netflix does through its local investments in production, very specific conceptions of what cultural production should be. In his literature review chapter, Tristan Mattelart shows, for example, how US-based social media platforms have to be seen not only as facilitating the production of content, by the infrastructures of creation they offer to their users, but also as organising this production, given the specific model of cultural production, driven by the metrics, they spread in the Global South as in the Global North.

In this respect, the chapters in this book outline some of the contours of this specific model of cultural creation that is promoted by these digital platforms and not only the global ones. Studying the investments of Amazon and Flipkart in the craft sector in India, Christine Ithurbide demonstrates that these platforms bolster, for the artisans, 'a shift toward self-entrepreneurship', resulting in the necessity for them to perform 'an increasing number of non-cultural tasks', such as 'client relation management, digital marketing', in order to be competitive according to the platform logic, with the risk of ending up in 'self-exploitation'.

Revealingly, the Latin American cultural crowdfunding platforms studied by Alix Bénistant and Jeremy Vachet, while not having a sustainable business model, have nonetheless constituted, for those who have worked for them, interesting places for acquiring an 'entrepreneurial skill' or an ability 'to adapt to the market'.

The chapter that perhaps best captures the contours of the model of creation that is promoted by the global digital platforms is the one Arturo Arriagada devotes to the 'media kits' used as self-promotion tools by Chilean influencers in the field of fashion. He explains quite clearly how essential it is for these content creators to get good metrics. These are key indicators of their 'status' and of their 'level of authority and expertise'. In order to maximise these metrics, these creators have to constantly move across different platforms and need to constantly adapt their productions to these platforms' 'algorithms and […] technical features'.

In addition to the description of this highly commercialised model of content creation, the chapter by Arturo Arriagada is interesting in that it shows how global social media platforms such as Instagram, YouTube or TikTok give these influencers a means to become, on their own small or large scale, non-negligible local relays contributing to the circulation of commodity flows within the transnational capitalist system. These influencers play, as a matter of fact, a key mediating role between, on the one hand, global brands such as Nike, H&M, Lancôme, Swarovski, Zara, amongst others, and, on the other, Chilean consumers. These local influencers are in a better position than traditional advertisers, as one of his informants says, to 'communicate [those transnational] brands naturally… organically' to their local audience.

Conclusion

While putting together the chapters for this book, we have tried to follow the advice, given by Marc Steinberg, not to reduce the geography of digital platforms to a 'bipolar world' – with 'the US (often called "Western")', on one side, the Chinese platforms, on the other – and to pay more attention to the 'local or regional challenges to the US companies' (Steinberg, 2020, p. 2). Once finished, this volume gives an idea of the diversity of situations in which these local or regional platforms operate, according to local characteristics. There is no doubt that this diversity would have been even greater if the situations of smaller Southern countries in terms of population or socio-economic weight had been addressed more. Indeed, most of the countries taken as case studies in this volume are rather large and powerful (for instance, China, India, Nigeria, Brazil or Mexico). This comes as an incentive to explore further the constellation of local or regional digital platforms that have flourished in these smaller countries, but also to investigate more broadly the ways in which the major Chinese, Indian, South African or Brazilian platforms are expanding in other Global South regions.

The study of WeChat included in this collection reveals the variety of trajectories that exist in this latter domain. As Yuwen Zhang shows, there is a huge contrast between WeChat's central importance in its Chinese domestic market and the limited results of its internationalisation. As such, WeChat's trajectory is very different from TikTok's, a company that, through its global expansion, has become an 'emergent power in the US-dominated global platform ecosystem' (Jia & Liang, 2021, p. 273). In any case, there is no question that the strategies deployed by Chinese digital industries – including platforms, infrastructures and equipment – in the Global South need to be further researched.

Besides considering not only the global but also the regional or local digital platforms, the chapters of this book have all studied how these have had to adapt to the political, social, economic or cultural specificities of the countries of the Global South under consideration. Some aspects, such as the issue of linguistic fragmentation and regional variations, mentioned by Joe F. Khalil and Mohamed Zayani when analysing streaming services in Arabic-speaking countries, would, however, demand to be further monitored. This linguistic diversity in most of the countries or regions of the Global South is indeed a key element to take into account when examining the deployment of these platforms, especially those offering cultural content or products.

In this volume, we have also tried to reintroduce, within the analysis of global digital platforms, the local players without which these platforms cannot invest in the markets of the Global South. In addition to emphasising the relationships established between these global platforms and a plurality of local firms (or local subsidiaries of transnational firms) or other social and cultural local actors, the chapters of this book all underline in their own way the key role that public policies play in easing or, conversely, making the investments of these global platforms more difficult in these national markets, revealing a wide range of situations. In some of the countries under consideration public initiatives have been put in place to, in certain cases, protect domestic cultural industries from competition from global platforms, and, in others, to fight these in order to better exert governmental control over the online public sphere. In contrast, in other countries, the investments of these global platforms are facilitated, provided that they serve the interests of the host state. Elsewhere, with the development of digital platforms, policies have been implemented to reduce public subsidies to culture and to transfer responsibilities that were previously carried out by public actors to these private actors. This variety of policies also merits further investigations.

The same complex picture emerges from the chapters studying the diverse individual actors working for or with these digital platforms – whether artists, artisans, crowdfunding workers, influencers or entrepreneurs. Far from the enthusiastic promises of facilitated cultural creation that accompanied the rise of these platforms, these chapters study the actual working conditions that have been implemented by these companies, revealing tensions

between, on the one hand, the way in which these platforms have allowed the development of talents and have given them access to complementary sources of income, and, on the other, the strong rationalisation of practices and the 'commodification of inter-individual relations' that are at work, as highlighted by Alix Bénistant and Jeremy Vachet. In any event, these chapters all underline how the relationship with digital platforms is for these diverse kinds of digital cultural workers fraught with 'nuances and contradictions', to borrow terms from Alessandro Jedlowski, who sees in these contradictions an 'invitation to […] dig deeper into the realities that the introduction of platforms is contributing to create'.

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