

Executive summary

Arts and Technologies in ASEAN

Interconnected Parts



ASEAN-UK Advancing
Creative Economy Initiative

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Executive summary

The arts and technologies ecosystem in the Association of Southeast Asian Nations (ASEAN) is shaped by tradition, modernity, and a drive for prosperity. It has evolved significantly over the past decade, as marked by the expansion of social media platforms, immersive experiences and artificial intelligence. The Covid-19 pandemic accelerated a shift to hybrid and digital-first approaches in the arts, with a focus on upskilling and new livelihood opportunities for creative professionals. Artists are pushing practices by using technologies in lighting, 3D, sensors, sound production and others.

Arts and Technologies in ASEAN: Interconnected Parts takes a closer look at 10 ASEAN member states and Timor-Leste by investigating how intersections between the arts and technology are leading to new practices and trends. The British Council has commissioned Creative Friction Ltd. to learn more and map these developments. Through in-depth case studies and over 60 interviews with artists, technologists, policymakers and academics, the report reveals a highly diverse region at the forefront of exciting ideas and innovation. The study is unique as it examines developments from an artist-led perspective rather than a purely economic lens.

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Key findings



ASEAN's arts and technologies are driven by artist-led innovations that enhance tradition and establish new paradigms of artistic expression. Artists are advancing fields like fashion, new media, animation and music, setting new standards for creativity, research and development, and global engagement.



Interdisciplinarity has blurred boundaries between traditional art forms, new media, and technology. Initiatives often bring together art, science, and community engagement. Case studies highlight and put into questions the evolving role of artists, who are increasingly becoming researchers, innovators, coders, and entrepreneurs. But more importantly, this evolution highlights the capacity of artists as connectors of knowledge and life-long learners.



The socio-political landscape greatly informs creative expression. Artists are exploring themes around healing, climate resilience, and socio-political dialogue, redefining what it means to be innovative. For example, artists in Myanmar use VR and the metaverse for activism, while in Cambodia, new media explores cultural memory and urban development. In Thailand, art-science collaborations showcase how creative technologies can drive ecological awareness.



Technology has become a bridge to explore fundamental questions around humanity. Through immersive technologies, artists in ASEAN are creating entire worlds that simulate human interactions. Spirituality emerges as an unexpected yet profound theme with practices seeking to shape artistic expression, and reflect the interconnectedness of life, belief systems, and the natural world. This raises profound questions about how we interact, learn and consume in today's world.



ASEAN is a dynamic ecosystem that involves governments, educational institutions, startups, spaces, artists and civil society. Government support and educational programmes, though varying by country, drive digital transformation in the creative industries. Startups and creative hubs foster entrepreneurship and public engagement, while international organisations and NGOs support contexts with limited resources.



Technology has transformed creative jobs and artistic practices. Design processes like research, prototyping, and ideation allow artists to become more competitive. While highly creative tasks are still highly valued, AI automation is displacing repetitive roles and creating job insecurity.



The arrival of generative AI (GenAI) is a double-edged sword. Advanced AI models and tools remain largely proprietary and paying, limiting artists to content generation rather than higher-level innovation. Artists navigate this context by using technology selectively and ensuring it enhances rather than overshadows creativity. But this underscores a broader trend: despite technological advancements, ASEAN artists still view creativity as a fundamentally human, analogue endeavour.



Big technology companies impact accessibility, especially for developing countries. This has created dependencies through restrictive licensing, high fees and potential barriers to entry for smaller or independent creators. While open-source platforms offer flexibility, they often lack the resources and stability provided by big tech, creating barriers for smaller creators.



Intellectual property (IP) support is critical. It protects content and innovation, attracts investment and ensures fair compensation for creators. International regulations promote innovation and safeguard rights. However, support varies across ASEAN, with countries like Singapore and Malaysia having robust IP systems, while others like Lao PDR and Myanmar are still in early stages.



The digital divide remains. This is due to various factors, including insufficient funding, political instability and economic uncertainty. Women, ethnic minorities, low-income students and other marginalised groups face significant barriers to technology access and higher education. Fragmented ecosystems across ASEAN complicate regional collaboration and lead to missed opportunities.

Promoting more coordinated exchanges, harmonised policies, and strategic investments is crucial.

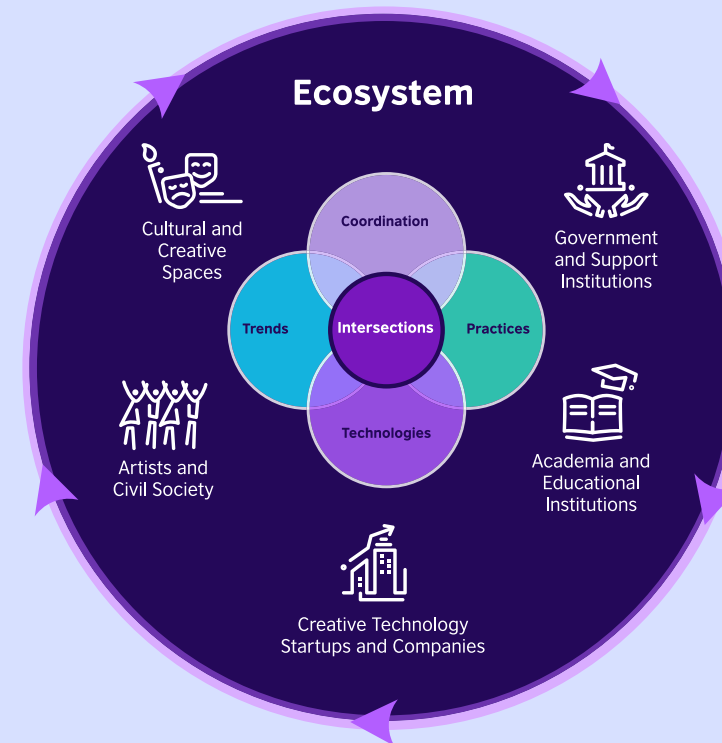
Fostering digital literacy and skills development, particularly among women and marginalised groups, is key to bridging the digital divide. Expanding support for interdisciplinary activities, such as through creative hubs and incubators, will nurture talent and drive innovative solutions.

The United Kingdom (UK) is already playing a significant role in the region through policies and agreements that encourage international cooperation and cross-sectoral collaboration. The British Council, working with stakeholders, can play a pivotal role through leveraging networks, funding and sector expertise. By encouraging arts-led innovations, ASEAN has a unique opportunity to unlock new narratives, inclusive prosperity and achieve global impact.

Ecosystem dynamics

Ecosystem dynamics refer to the interactions between the different dimensions of the ecosystem. These interconnected parts are what give character, energy and colour to the ASEAN region.

ASEAN countries have their own unique strengths and focus areas. Singapore and the Philippines, for example, are at the forefront of new media and digital content development, while countries like Brunei and Timor-Leste are making strides to integrate technology with traditional arts. Across the board, GenAI is fast becoming a tool transforming creative practices. Despite challenges related to infrastructure and access, the region is driven to become a growing force in the global creative economy.



Ecosystem dynamics: Shaped by stakeholders and the many ways that trends, technologies, practices, and policy coordination are intersecting.

Country	Creative technology ecosystem
Brunei Darussalam	Emerging creative technology ecosystem with strong government interest but limited infrastructure and investment.
Cambodia	Developing ecosystem with increasing integration of digital technologies into cultural heritage and contemporary art, though infrastructure and funding challenges persist.
Indonesia	Rapidly evolving ecosystem with a focus on integrating technology into traditional art forms, supported by a growing tech-savvy population.
Lao PDR	Developing ecosystem with growing interest in digital technologies for cultural expression, particularly in animation and contemporary arts.
Malaysia	Mature ecosystem blending traditional and digital practices, particularly in music production, with strong government support and an active digital community.
Myanmar	Emerging ecosystem with interest in new media art and the metaverse, driven by a small but innovative community amidst political and economic challenges.
Philippines	Robust ecosystem, particularly in animation and content development, with growing international collaboration and industry support.
Singapore	Leading hub for new media and metaverse technologies in Asia, supported by strong infrastructure, government initiatives, and an international network of creative professionals.
Thailand	Vibrant creative technology ecosystem with significant growth in areas such as bioart, digital media, and immersive technologies, often focused on ecological, scientific, and cultural themes.
Timor-Leste	Early-stage ecosystem with efforts focused on preserving traditional culture through digital means and building infrastructure.
Vietnam	Rapidly growing ecosystem with a strong emphasis on new media art and immersive technologies, supported by investment in education and industry.



The full report can be found in a separate document, *Arts and Technologies in ASEAN: Interconnected Parts, Full report*.

Detailed findings for the 11 countries can be found as a separate file, *Appendix B: Country deep dives*.

A comprehensive overview of relevant policies is found in another separate file, *Appendix C: Policy frameworks*.



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