

INTERNATIONALISATION STRATEGIES AND PUBLIC POLICIES TO FOSTER THE EXPORTS OF CREATIVE GOODS AND SERVICES: AN EVALUATION OF BRAZIL, CHILE, AND COLOMBIA FROM 2011 TO 2020*

ESTRATÉGIAS DE INTERNACIONALIZAÇÃO E POLÍTICAS PÚBLICAS DE ESTÍMULO ÀS EXPORTAÇÕES DE BENS E SERVIÇOS CRIATIVOS: UMA AVALIAÇÃO DE BRASIL, CHILE E COLÔMBIA, DE 2011 A 2020

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ABSTRACT

This article analyses how Brazil, Chile and Colombia acted to foster exports of creative goods and services during the period from 2011 to 2020. It deals with the strategies of internationalisation and public policies focusing on the first phase of the public policy cycle: agenda setting and formulation of alternatives. A review of the main policies of each country is made followed by an analysis about how Brazil articulated public actors to design its strategies in comparison with Chile's and Colombia's policies. The results suggest that these countries in general follow different strategies, the most important of them was the creation in Chile and Colombia of legal and institutional frameworks that deal with public policies towards the creative sectors in a transversal way, while in Brazil this was not effective enough. On the other hand, it was possible to observe a few similarities, such as the participation of private sector entities in promoting creative exports.

Keywords: Public policies. Creative goods and services. International trade.

RESUMO

Este artigo analisa como Brasil, Chile e Colômbia atuaram para fomentar as exportações de bens e serviços criativos durante o período de 2011 a 2020. São estudadas as estratégias de internacionalização e as políticas públicas com foco na primeira fase do ciclo das políticas públicas, qual seja a definição de agenda e a formulação de alternativas. É feita uma revisão das principais políticas de cada país, seguida de uma análise sobre como o Brasil articulou os atores públicos para desenhar suas estratégias em comparação com as políticas do Chile e da Colômbia. Os resultados sugerem que esses países em geral seguem diferentes estratégias, sendo a mais importante delas a criação no Chile e na Colômbia de marcos legais e institucionais que tratam de políticas públicas para os setores criativos de forma transversal, ao passo que no Brasil isso não foi suficientemente efetivo. Por outro lado, foi possível observar algumas semelhanças, como a

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participação de entidades do setor privado na promoção das exportações de bens e serviços criativos.

Palavras-chave: Políticas públicas. Bens e serviços criativos. Comércio internacional.

1 INTRODUCTION

This article presents the results of the research developed during the professional master's in Economics and Politics of Culture and Creative Industries at the Federal University of Rio Grande do Sul (Porto Alegre, Brazil). It investigates the formulation of public policies to foster creative exports in Brazil, Colombia, and Chile, in order to answer the following question: What have been the strategies of the Brazilian, Colombian and Chilean governments to promote exports of creative goods and services from 2011 to 2020? The main objective of this research is to compare the strategies of the Brazilian, Colombian and Chilean governments to promote exports of creative goods and services from 2011 to 2020. The specific objectives of this research are:

- a) to map the bureaucratic-institutional structure aimed at promoting exports of creative goods and services in the selected countries;
- b) to map and evaluate the policies developed in the three countries during the studied period; and
- c) to think over the role of the State in promoting the cultural sector as part of a comprehensive and coordinated socio-economic development strategy.

As a working hypothesis, we observed that Brazil, Chile and Colombia have developed projects and plans for their export policy for creative goods and services. In comparison to Chile and Colombia, however, articulations among the Brazilian government institutions were not effective enough in designing export strategies.

The methodology of this work consists in:

- a) literature review and documental research about the economy of culture and creative industries, public and innovation policies, market intelligence and international trade;
- b) survey of the bureaucratic-institutional framework for the promotion of exports of creative goods and services in the selected countries;
- c) survey of the main public policies which were designed to structure cultural sectors and creative industries in Brazil, Chile and Colombia, from 2011 to 2020, through the review of documents produced by Brazilian, Chilean and Colombian institutions; and
- d) individual semi-structured interviews with managers from the three countries chosen for the case study, in order to gather information on public policies to foster exports carried out in the indicated countries from 2011 to 2020.

This material is critically analysed to respond to the objectives of this research.

The analysis carried out here will be circumscribed to the phase of formulation of public policies, meaning that it will not delve into other phases of policy cycle, such as the implementation or evaluation of policies. In addition, methodological differences in measurement made in each country must be considered, since they impact in the definition of what is or is not part of the cultural and creative sectors. These differences permeate the data analysis of the specific sections of each country and will be reflected in the conclusions of the work.

This article is divided in five sections. Following this introduction, the next section presents the theoretical background which supports the analysis. The third section shows the

policies of each country. In the fourth section the three cases are compared. The final section concludes the article.

2 THEORETICAL BACKGROUNDS

As a theoretical foundation, this work starts from studies on the cycle of public policies, which is a model that systematizes the steps in which the process of construction and execution of a policy takes place, starting with the definition of the agenda, moving on to the formulation of alternatives all the way to decision-making, then into implementation and finally evaluating policy execution.

To support the research theme from an economic perspective, this article uses some research that points out how the economy of culture is related to innovation policies and the importance of cultural sectors as engines of innovation and development. Among other authors, we think over Tolila's idea that cultural activities are part of long-term policies and contribute to innovation and competitiveness. Then we consider the ideas of Potts and Cunningham about four economic models that describe the relationship between economy and creative industries. Moreover, we have the inducing role of the State in innovation processes and public policies addressed in studies of the Entrepreneurial State and mission-oriented policies, with Mariana Mazzucatto, and other researchers, ahead.

These concepts are in line with the defence of the transversality of creative sectors, brought in IDB publications and also in Luciana Guilherme's thesis, which are detailed in the next sections.

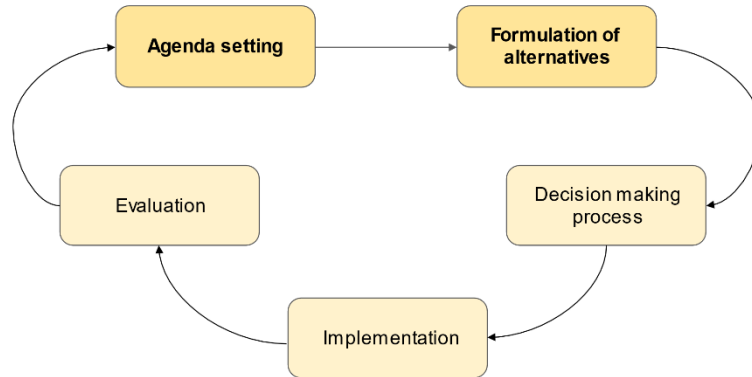
2.1 PUBLIC POLICY CYCLE

The public policy process can be divided into five phases, which constitute the public policy cycle: agenda setting, formulation of alternatives, decision making, implementation and evaluation (HOWLETT, 2011¹ *apud* LIMA, 2022, p. 23). Some authors, such as Capella (2018), encompass agenda setting and the formulation of alternatives as the first stage of the public policy process, considered as the formulation stage, on which we will work in this article. Figure 1 illustrates the public policy cycle.

¹ HOWLETT, M. *Designing public policies: principles and instruments*. Abingdon: Routledge, 2011.

Figure 1- Public policy cycle

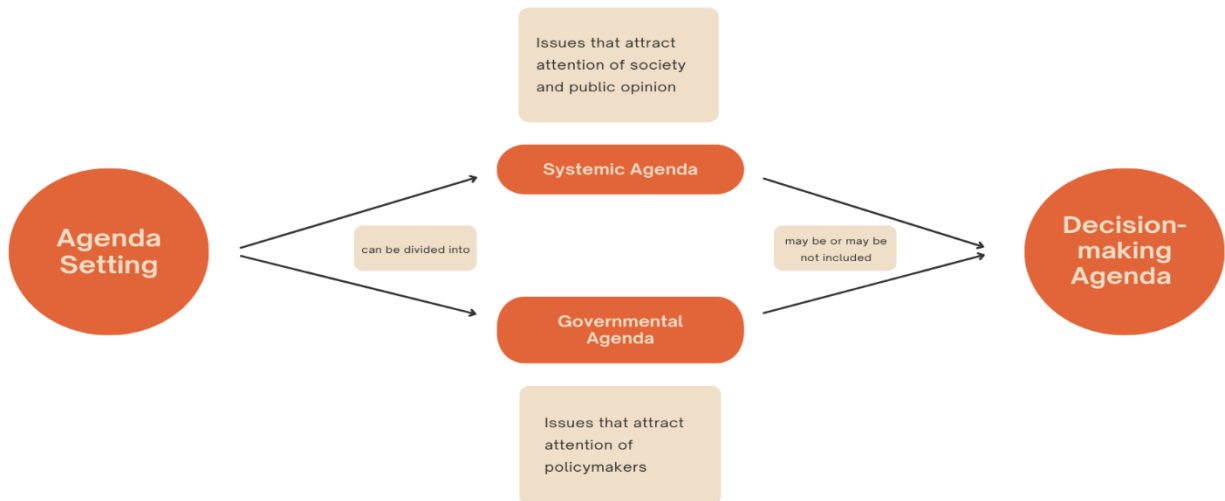
PUBLIC POLICY CYCLE



Source: Author based on Lima (2022).

Agenda setting is defined as the process in which social problems draw the attention of political actors to be considered as a possible object of public policies (LIMA, 2022, p. 24). This can be divided into a systemic agenda, comprised of issues that attract the attention of society and public opinion, and a governmental agenda, which is composed of themes that attract the attention of policymakers. The issues of these two types of agenda setting may or may not be included in the decision-making agenda, which are those problems that will effectively receive attention to be implemented as public policies (CAPELLA, 2018, p. 28-29). Figure 2 brings a schematic view of these concepts.

Figure 2 - From Agenda Setting to Decision-Making Agenda



Source: Author based on Capella (2018).

After defining the agenda, the formulation itself is the phase in which alternatives to deal with certain problems are defined. The solutions are designed considering different points of view and interests in dispute (CAPELLA, 2018, p. 73). The analysis of public policies for the

creative industries involves the role played by the State in financing creative activities, and the relatively recent recognition of a cultural economy.

2.2 CULTURAL AND CREATIVE INDUSTRIES POLICIES

The United Nations Conference on Trade and Development (UNCTAD), together with the United Nations Development Program (UNDP) (UNCTAD, 2022), defines the creative economy from a broad perspective, which involves not only economic aspects, but also artistic, cultural and industrial ones. Thus, the creative economy is an evolving concept based on creative assets that can potentially generate economic growth and development, as well as foster income generation, creation of jobs and exports growth, while at the same time it promotes social inclusion, cultural diversity and human development. It also covers cultural, social and economic aspects related to technology, intellectual property and tourism. It is also a group of knowledge-based economic activities with a development dimension and transversal connections with the whole economy and a viable option to development that demands innovative and multidisciplinary policies through interministerial actions. (UNCTAD, 2022, p.5)

As part of the creative economy, creative industries are defined by the UNCTAD (2022, p.5) as “[...] the cycles of creation, production and distribution of goods and services that use creativity and intellectual capital as their primary inputs. They are classified by their role in heritage, art, media, and functional creations.”.

According to Tolila (2007), macroeconomics took about 50 years to start carrying out studies and research related to the cultural sector, which led to just a few economists being interested in the subject and to a lack of data and information about the cultural sector’s importance to countries’ economy. This analysis coincides with the work by Throsby (2010) on the change in the States’ view of cultural policies. Until the 1970s, the focus in many countries was on traditional arts and their contribution to the education and civility of peoples. From 1990’s onwards, the growth of the creative economy and of cultural industries has led policies to emphasise the economic potential of the arts and the cultural sector.

Cultural activities constitute long-term structural policies, in conjunction with others areas such as education, science and technology, research & development (TOLILA, 2007), which are policies that allow innovation to flourish. These types of policies increase the country's competitiveness. Therefore, it is possible to combine policies aimed at cultural and creative sectors with innovation policies. When culture is included in economic analyses, policy makers are mobilised, and the subject “cultural economy” leaves the sphere of the systemic agenda – because it draws the attention of part of the public opinion and, in this case, of cultural and market agents – and enters the field of the governmental agenda.

Potts and Cunningham (2008) defined four economic models that can be applied to the study of the creative industries. They analysed how each of these models presents a dynamic relationship between the creative industries and the economy, leading to different responses in terms of economic policies. The four models were welfare, competition, growth and innovation. According to the authors, the last two are those that presented the best answers for three perspectives: firms, income, and comparative growth evidence. Model 4, concerning innovation, is based on Schumpeterian theoretical models and reinforces that the creative sectors contribute to the coordination of new ideas or technologies and, therefore, to the processes of change in the economy, thus having “crucial policy significance” (POTTS; CUNNINGHAM, 2008, p. 10).

In this context, the evolutionary perspective contained in model 4 considers the inducing role of the State so that the sectors are included in a broad development strategy. Supporting this

point of view, Mazzucato (2011) rejects the neoclassical theoretical line of Economics according to which the State should limit itself to guaranteeing the essential conditions for the market to develop and innovate, as if the State could not promote innovation. She points out that many of the innovations seen in the market today were due to large investments made by the public sector (MAZZUCATO, 2015). The author suggests that the structure of state agencies and laboratories can be used to shape markets and drive technological improvement, acting to accelerate the change through a network system with potential to disseminate new ideas quickly (MAZZUCATO, 2011).

Still related to this point of view, among the approaches to public policies that favour this vision and fit the cross-cutting nature of the creative industries are those “mission-oriented” (TATSCH, 2021). Mission-oriented policies can be defined as systemic public policies that use knowledge to achieve specific objectives (MAZZUCATO, 2018). They are interdisciplinary systemic policies that bring together different areas of knowledge to reach specific goals. Hence, the mission does not refer to a single project, but to a set of projects, which require investments in and for different sectors.

These concepts are in line with one of the challenges to be faced by governments: the transversality of the creative sectors, which requires integration between different areas within the governmental structure. As Luzardo and Gasca (2018) emphasise, the creative economy is transversal so it cannot be under the competence of cultural authorities only but demands a comprehensive coordination from different sectors. As Guilherme (2018, p. 234) explains, the complexity of the economic field linked to the creative sectors no longer supports an isolated and unidirectional logic of political action. In this way, she argues that “creative economy policies should not be limited to the policies of a ministry or a secretariat, but should be treated in a transversal way, even if under the leadership of an institution or entity, essential to guarantee a minimum level of institutionalism, coordination and articulation”¹ (GUILHERME, 2018, p. 234, our translation).

In the case of Brazil, some attempts to define or organise the joint action of federal agencies in public policies for the export of goods and services were made but without tangible measures. Coordination between the official culture body (the Ministry of Culture, until 2019, when it was replaced by the Special Secretariat for Culture, under the Ministry of Tourism), the Ministry of Foreign Affairs and the Brazilian Agency for the Promotion of Exports and Investments (Apex-Brasil) has occurred depending on the projects in progress, without any document that formalised a perennial or long-term partnership.

In contrast, Chile and Colombia are two examples of countries that have more coordinated and transversal policies to promote foreign trade of creative goods and services. The Colombian guidelines took part of a broader plan for the development of the creative sectors and are organised among the Ministry of Culture, the Ministry of Commerce and ProColombia, the autarchy responsible for international promotion and investment attraction. In the case of Chile, the competences related to the subject are also expressed in a multi-annual plan, with the functions shared between the Ministry of Cultures, Arts and Heritage of Chile, the Ministry of International Affairs and the Program for the Promotion of Chilean Exports (ProChile). The next section delves deeper in each of these cases.

¹ In the original: “Portanto, políticas de economia criativa não devem se limitar às políticas de um ministério ou de uma secretaria, mas devem ser tratadas de modo transversal, ainda que sob a liderança de um órgão ou entidade, essencial para garantir um nível mínimo institucionalidade, coordenação e articulação”.

3 CASE STUDIES

The economic chain linked to the creative sectors experienced, worldwide, throughout the 2010's, a constant increase, both in terms of income generation and jobs as well as exports. According to the UNCTAD (2022, p.15), the value of exports of creative goods was US\$548 billion in 2019, just under 3% of total exports of goods in that year. The average annual growth of creative goods exports between 2010 and 2019 was 2.4%. With regard to exports of creative services, the organization estimates that, in 2019, they amounted to around US\$ 1 trillion, with an estimated annual growth rate of 9% for the period 2010-2019 (UNCTAD, 2022, p.17).

In South America, however, there is a long way until the region takes advantage of its cultural potential to boost its international trade. According to the UNCTAD (2018, p. 25), Mercosur's foreign trade on creative goods and services in 2015 was around USD 1 billion, which represented only 0.2% of the international trade of this specific export list. In contrast, ASEAN² countries accounted for 4.5% of international trade on creative goods and services, with expanded ASEAN topping that list, accounting for 39.6% of this market share, or nearly US\$200 billion.

The distance between the countries of South America and the other regional blocs demonstrates that it has not yet been possible to reflect the diversity and creativity of the region in foreign trade gains.

Among the countries studied in this work, the cultural and creative sectors play an important role in the economy. In Colombia, over the last few years, their share has maintained an average of 3% of the Gross Added Value. The measurement takes into account the cultural and creative sectors according to the methodology developed by the National Administrative Department of Statistics (DANE), organised in a Satellite Account. In Chile the cultural sectors accounted for 2.2% of GAV, but there are still unpublished data from the Ministry of Culture and Arts that indicate that in 2019 this figure reached 2.5%. Data referring to the cultural sectors are consolidated by the Ministry of Culture and Arts based on information from Chile's National Accounts. In Brazil, according to data from the survey on creative industries by the Federation of Industries of Rio de Janeiro (Firjan), participation reached 2.91% of the Gross Domestic Product (GDP), in 2019, as Table 1 shows.

Table 1- Participation of creative sectors in the economy

Country	Sectors	Participation	Year	Focus
Brazil	Creative Industries	2.91%	2020	GDP
Chile	Culture	2.20%	2013	GAV
Colombia	Culture and Creative Economy	3.00%	2019	GAV

Source: DANE (2019); Firjan (2022).

This relatively important contribution to the economy of these countries is not reflected yet, however, in the countries' exports. The participation in exports of creative goods and services in Chile and Colombia is merely residual, around 0.75% in Chile and 0.60% in Colombia. In the case of Brazil, exports of creative goods and services reach a higher percentage than the sector's participation in the total economy. These exports, however, are led by Fashion

² ASEAN is composed by Brunei Darussalam, Cambodia, Indonesia, Laos, Malaysia, Myanmar, Philippines, Singapore, Thailand and Vietnam, and the expanded ASEAN is joined by China, Japan, and Korea.

and Handicraft activities, which account for more than 95% of exports, according to the Itaú Cultural Observatory's Data Panel. Table 2 presents an overview of the volume of exports registered in the years 2019 and 2020, considering that the three countries adopt different approaches in defining their basket of creative products and services.

Table 2 - Volume of exports of creative goods and services 2019 and 2020 (in USD million FOB)

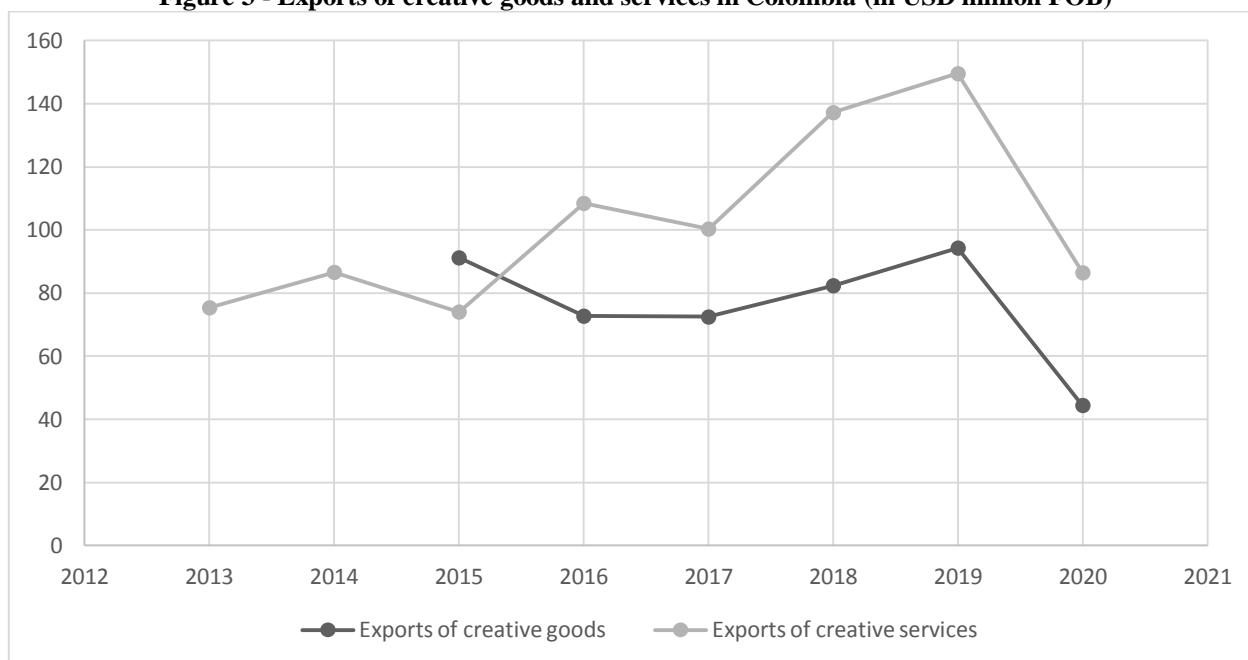
Country	Exports of creative goods and services 2019	Total Exports 2019	Rate	Exports of creative goods and services 2020	Total Exports 2020	Rate
Brazil ⁽¹⁾	7,607.55	221,126.80	3.37%	7,807.30	209,180.20	3.73%
Chile ⁽²⁾	591.96	78,022.00	0.76%	568.23	79,803.00	0.71%
Colombia ⁽³⁾	243.85	39,489.38	0.61%	130.88	31,055.81	0.42%

Source: (1): Itaú Cultural (2022) and the Brazilian Ministry of Development, Industries, Trade and Services (BRASIL, 2023); (2): Chile's Observatory of Culture (CHILE, 2021); (3): Reports on Culture and Creative Economy and the Colombian National Accounts both provided by the Colombian National Department of Statistics (DANE, 2022).

It is important to consider, in this analysis, the differences in methodology among countries. Unlike Chile and Brazil, Colombia has a Satellite Account for Culture and Creative Economy, which extracts from national accounts the values of more than one hundred subsectors, directly or indirectly related to the field of culture and creative economy. Data on foreign trade, however, only started to be included in the 2021 reports, with data from 2019. Therefore, to access the numbers from previous years, it was necessary to consult other DANE databases (DANE, 2022).

The data on creative goods were taken from the DANE reports on Culture and Creative Economy, and provide information on arts and heritage, functional creations and cultural industries. With regard to creative services, the data are grouped together with other categories that do not belong to the cultural and creative sectors, considering that the account refers to "personal, cultural and leisure services". As Figure 3 shows, there was an increase in exports from 2017 onwards, but this trend of growth was interrupted by the pandemic in 2020.

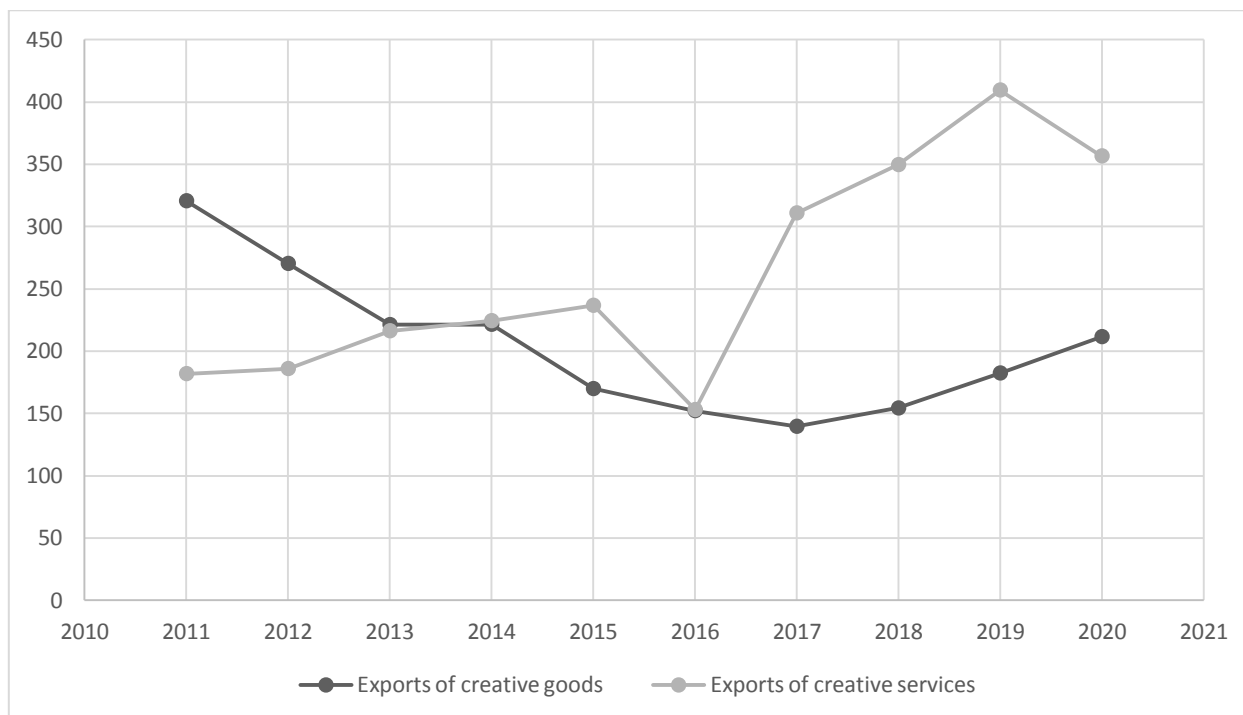
Figure 3 - Exports of creative goods and services in Colombia (in USD million FOB)



Source: Elaborated by the author with information from the Reports on Culture and Creative Economy and the Colombian National Accounts both provided by the Colombian National Department of Statistics (DANE, 2012-2021).

In the case of Chile, export data is provided by the Annual Reports Prof of the Ministry of Culture and Arts in partnership with the National Institute of Statistics (CHILE, 2021). In these reports, cultural and creative goods are broken down by the following sectors and subsectors: architecture, design and creative services, performing arts, literary arts, books and press, musical arts, visual arts, handicrafts, infrastructure and equipment, audiovisual and interactive media and heritage. As regards creative services, the sectors are similar to goods, with the exception of crafts, performing arts and heritage, but the subsectors change. Additionally, since 2019, service data has been disaggregated into core services for culture and services supporting culture. Figure 4 shows that from 2016 onwards there was growth in exports of both goods and services, the latter being more pronounced. In 2020, the first year of the Covid-19 pandemic, there was a drop in exports of services, but as for exports of goods, the recovery that had been occurring since 2017 continued.

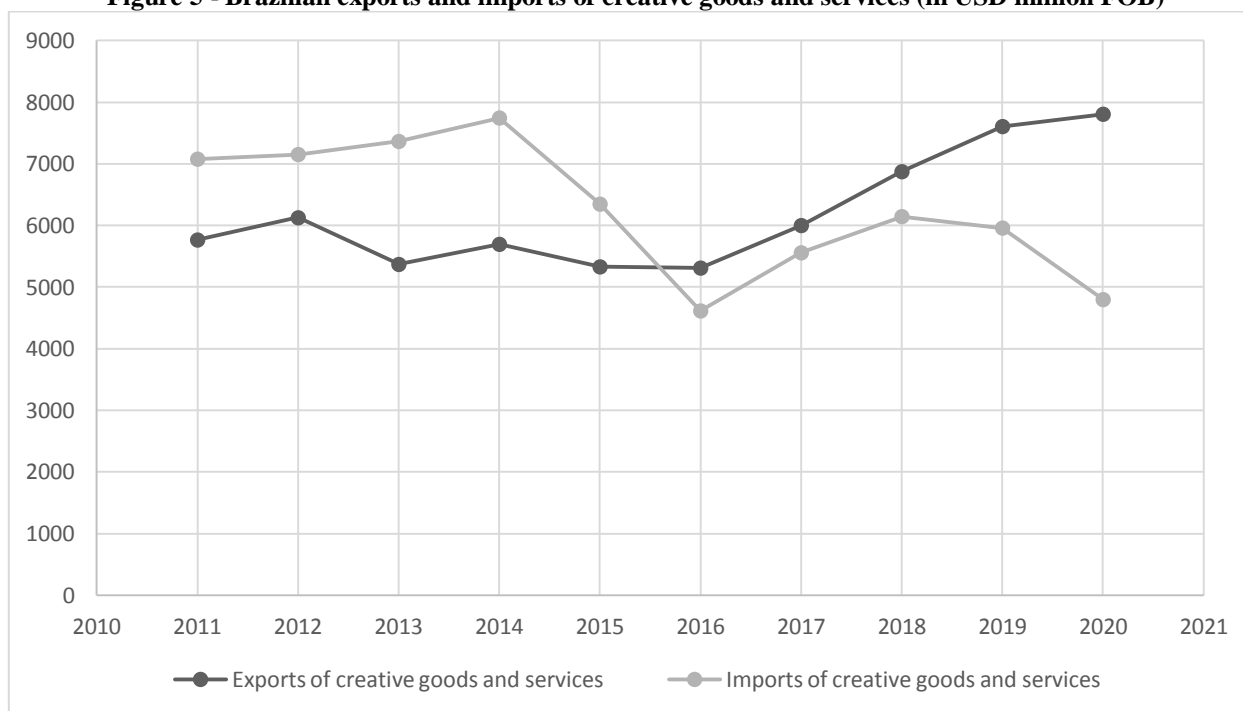
Figure 4 - Exports of creative goods and services in Chile (in USD million FOB)



Source: Chile's Observatory of Culture – Annual Reports, from 2011 to 2020

Data referring to the cultural and creative sectors in Brazil can be found in several sources. Official data is provided by the Brazilian Institute of Geography and Statistics (IBGE), which provides information in the Cultural Information and Indicators System (SIIC), mostly related to the supply of goods and services, the expenses of families and the government, and the characteristics of the employed population. However, there were periods when the data had not been updated for more than six years, a problem which seems to have been solved in the last three years. The IBGE does not provide specific data referring to the cultural sector and the national accounts, such as exports and imports and Gross Domestic Product (GDP). That is why, in addition to this official source, there are other sources that provide important data on the creative sectors. The Federation of Industries of Rio de Janeiro (Firjan) provides data on the participation of the creative sectors in the economy, including an estimation of GDP, and the Itaú Cultural Observatory Data Panel, created in 2020, provides, among others, data on exports and imports of the creative sectors.

During the period from 2011 to 2020, Brazilian exports of creative goods and services increased US\$2 billion, from US\$5.7 billion dollars to US\$7.8 billion. The data is from the Data Panel of the Itaú Cultural Observatory. The data covers the following sectors related to products: Fashion, Craft Activities, Performing Arts and Visual Arts, Museums and Heritage. As for services, they comprise the following sectors: Publishing, Cinema, Music, Photography, Radio and TV, Information Technology, Architecture, Advertising and Business Services, Design, Performing Arts and Visual Arts, Museums and Heritage, Copyright. Figure 5 shows the evolution of Brazilian exports and imports of creative goods and services in the studied period. The Data Panel of Itaú's Cultural Observatory does not provide separate information about creative goods and services.

Figure 5 - Brazilian exports and imports of creative goods and services (in USD million FOB)

Source: Itaú Cultural (2022).

As a summary, Table 3 shows the sectors covered in each country to define the baskets of exported and imported goods and services.

Table 3 - Sectors included in the basket of creative goods and services measured in each country

Country	Goods included	Who measures	Services included	Who measures
Brazil	Fashion, Craft Activities, Performing Arts and Visual Arts, Museums and Heritage	Itaú Cultural Observatory's Data Panel based on data from the Brazilian Ministry of Development, Industries, Trade and Services	Publishing, Cinema, Music, Photography, Radio and TV, Information Technology, Architecture, Advertising and Business Services, Design, Performing Arts and Visual Arts, Museums and Heritage, Copyright	Itaú Cultural Observatory's Data Panel based on data from the Brazilian Ministry of Development, Industries, Trade and Services
Chile	Architecture, Design and Creative Services Performing Arts Literary Arts, Books and Press, Musical Arts, Visual Arts, Crafts, Infrastructure and Equipment, Audiovisual and Interactive Media, Heritage	Chile's Ministry of Cultures, Arts and Heritage and Chilean National Institute of Statistics	Nuclear services to culture: Musical Arts, Literary Arts, Books and Press, Audiovisual and Interactive Media, Architecture, Design and Creative Services, Infrastructure and Equipment	Chile's Ministry of Cultures, Arts and Heritage and Chilean National Institute of Statistics

Country	Goods included	Who measures	Services included	Who measures
			Cultural support services: Architecture, Design and Creative Services, Infrastructure and Equipment	
Colombia	Arts and heritage, Functional creations, Cultural industries	DANE's Satellite Account of Culture and Creative Economy	Personal, cultural and leisure services	DANE's Quarterly Sample of Foreign Trade in Services

Source: (1): Itaú Cultural, 2022; (2): CHILE, 2021; (3): DANE, 2022.

In the next subsections, an analysis will be provided of public policies developed in the three countries and the strategies used by different institutions in order to foster exports of creative goods and services.

3.1 INSTITUTIONAL FRAMEWORK OF PUBLIC POLICIES FOR THE BRAZILIAN CREATIVE SECTORS

The Constitution of the Federal Republic of Brazil, promulgated in 1988 and known as the Citizen Constitution, and its amendments, brought an entire section dedicated to cultural rights, with three articles that defines how the state should act to protect these rights, assure access to culture, elaborate a decennial national cultural plan, and organize a national cultural system with the participation of states and municipalities. In its article 215, the Constitution states: “The State shall guarantee the complete exercise of cultural rights and access to the sources of national culture to everyone and shall support and encourage the appreciation and dissemination of cultural manifestations”³ (BRASIL, 2022, our translation).

With the approval of the National Plan of Culture (NPC), in 2010, Brazil started to give more attention to public policies for creative sectors. The next year, the Secretariat of Creative Economy was created. These documents and the initiatives of the Ministry of Culture, Apex-Brasil and the Ministry of Foreign Affairs are part of the analysis of this section.

The Secretariat of Creative Economy (SEC) was created within the structure of the Ministry of Culture in 2011 to meet a determination from the National Plan of Culture (NPC) 2010-2020 towards specific cultural public policies for the creative economy and the economy of culture. In the Federal Constitution of Brazil, in an amendment of 2005, the determination to elaborate the NPC has the objectives of promoting the cultural development of the country and integrating the actions of the public sector. The NPC (BRASIL, 2010) reflects the concept of culture having three dimensions in which public policies happen: the social dimension, the citizen dimension, and the economic dimension. The last one is expressed in strategy 4 of the NPC, that is, “Expand the participation of culture in sustainable socioeconomic development” (BRASIL, 2010). Drawing a parallel with the concepts of public policy formulation, as explained by Capella (2018, p. 28-29), at this moment the issue leaves the systemic agenda to the governmental agenda until it finds space in the decision-making agenda.

³ In the original: “O Estado garantirá a todos o pleno exercício dos direitos culturais e acesso às fontes da cultura nacional, e apoiará e incentivará a valorização e a difusão das manifestações culturais”.

The Secretariat of Creative Economy Plan was launched in 2012 and established the concept of creative economy and the entire process of building and structuring the bases of the Secretariat and its strategies. It brought as its main vision culture as the axis of development of the Brazilian State and organized the structure of the Secretariat's actions on topics related to microeconomics and macroeconomics. According to the then Secretary Claudia Leitão, in interview to this research, the intention was to bring culture to the discussing table in what pertains to development and tackle structural issues to allow the growth of the sector. Thus, the Secretariat's objectives were divided into four subjects, namely: training and assistance to creative workers, encouraging the development of the Creative Economy, Cultural Tourism, and Economic Regulation (legal frameworks). The SEC Plan also discussed the definition of creative sectors and cultural activities covered by the Ministry of Culture, as it is possible to see in Table 4.

Table 4 - Creative activities covered by the Brazilian Ministry of Culture (2011)

Group	Activities
Heritage	Material and Immaterial Heritage, Museums, Archives
Cultural Expressions	Craft, Popular, Indigenous and African-Brazilian Cultures, Visual Arts
Performing Arts	Theatre, Dance, Circus, Music
Audiovisual and Publishing	Film, TV, Publishing, Press Media
Functional Creations	Design, Fashion, Architecture, Digital Arts

Source: The Secretariat of Creative Economy Plan (BRASIL, 2011, p. 29).

In the second axis – stimulating the development of the Creative Economy –, some of the objectives refer to the export of goods and services. One of them makes direct reference to supporting the increase of exports and the other mentions supporting the greater circulation and distribution of creative goods and services. These objectives were reflected within the structure of the Secretariat in the Directorate of Entrepreneurship, Management and Innovation, which had among its functions the promotion of creative goods and services in the international market, in articulation with the Ministry of Foreign Affairs (BRASIL, 2012).

The SEC Plan designed an institutional articulation with other ministries, in addition to public banks, development banks and agencies. A development of this document was the institutional articulation and elaboration of Creative Brazil Plan (*Plano Brasil Criativo*, 2013), which was never officially launched. The CBP envisaged that the creative economy agenda would be dealt with in a transversal manner, functioning as a coordination tool and connection between projects already carried out in different bodies. As Guilherme (2018, p. 233) points out, there was great resistance to dealing with a cross-cutting theme within the tight and hierarchical structures of the Ministries, and also a resistance within the Ministry of Culture.

With the difficulties in institutionalizing the transversal treatment of the theme, the efforts of the Ministry of Culture continued with the approach of negotiating agenda by agenda. In the case of policies related to the internationalization and export of goods and services, the main players in Brazil are the Ministry of Foreign Affairs and the Brazilian Agency for the Promotion of Exports and Investments (Apex-Brasil).

The Ministry of Foreign Affairs has a structure dedicated to cultural policy, reflected in a network of cultural divisions in Brazilian Embassies, which are responsible of developing actions to promote Brazilian culture abroad and implement the guidelines of the Brazilian Foreign Policy. In Brasília this group of guidelines and actions is coordinated by the Cultural Department, recently turned into Cultural Institute Guimarães Rosa. The main framework of action considered

by the Ministry of Foreign Affairs is the Brazilian Foreign Policy, although there is a dialogue established between both ministries to conduct specific actions abroad.

The institutional relationship with Apex-Brasil was based on sectoral projects that the agency had been developing since 2004. However, there was no articulation between the institutions during the period of public policy formulation, only during the process of implementation, according to the interest of each association linked to a sectoral project.

Created in 2003, after five years being part of the Sebrae structure, Apex-Brasil is the agency responsible for promoting Brazilian products and services abroad and attracting foreign investment to strategic sectors. Apex-Brasil serves companies of all sizes, but prioritizes small and medium-sized ones, and operates in all stages of export maturity. One of the agency's lines of actions is the Sector Projects, which are organized in partnership with sector entities and develop prospective and commercial missions, business roundtables, support for the participation of Brazilian companies in major international fairs and visits by foreign buyers and opinion makers to get to know the Brazilian productive structure.

Until 2020, Apex Brasil's sectoral projects were divided into groups of productive sectors, namely: agribusiness; food and drinks; technology and health; machines and equipment; home and construction; fashion; and creative economy and services. The last three groups fall within the scope of this research, but not in their entirety. In the creative economy and services sectors, in addition to sectoral projects in sectors such as audiovisual, music, publishing, visual arts and games, there are others related to franchising, which were not considered among the creative sectors. Likewise, the fashion sector was broad enough to include the leather-footwear sector and gems and jewellery, which were not part of the scope of this research. In the home and construction sector, there are sectoral projects related to handicrafts, considered one of the creative sectors, but not the others, related to engineering projects and construction materials.

The decision to support the creative sectors took place during Apex-Brasil's first years of operation, around 2004, when the first projects aimed at supporting companies from some creative sectors interested in boosting their exports were created. These sectoral projects had the objective of expanding the Brazilian export agenda, still highly concentrated on commodities. The projects were developed in areas such as: publishing, cinema, TV, publicity, games, music, visual arts, and others.

According to Christiano Lima Braga, manager of sectoral projects from 2005 until 2008 and exports manager from 2008 until 2019, the sectors had to have an organized association that could apply for a project and, from the moment the agreement with the sectoral entity was signed and the project was instituted, a sectoral planning was carried out to define the goals to be met. This fact seems to indicate that rather than choosing the priority sectors, the process of defining supported projects followed the logic of the best organized sector, with an association capable of operating promotion actions. Thus, the analysis of the project's viability would be performed later through the evaluation of the results. Consequently, some projects were discontinued throughout the years.

Throughout the period researched, Apex-Brasil developed on a permanent basis, with periodic renewals of agreements with representative associations, seven projects in the creative economy and services sector and two projects in the Fashion sector. These projects are described in Annex A.

Projects linked to musical instruments, through an agreement with the National Association of Musical and Audio Instrument Manufacturers (ANAFIMA), and the Design sector, through an agreement with the Brazilian Association of Design Companies (ABEDESIGN), were discontinued in 2014 and 2015, respectively. In addition to them, there

were projects related to the creative economy sector, but which were allocated to the Home and Construction sector in the areas of crafts, architecture and design. These projects have been discontinued from 2016 onwards. After the change of government in January 2019, even well-succeeded projects were discontinued: the agreement with SIAESP was terminated that year, while, in 2020, the agreements with BRAVI and BM&A were terminated.

Considering the period researched, from 2011 to 2020, it appears that, in general, the Agency's strategy was based on the search for competitive and sustainable insertion and international expansion of companies supported by global value chains. For this, the agency used its structure abroad – through its business centres – and the Offices and Embassies of the Ministry of Foreign Affairs, which took place more noticeably from 2016 onward, when the agency moved from the field of influence from the Ministry of Development, Industry and Foreign Trade to the Ministry of Foreign Affairs.

As a support to the international insertion strategies, APEX-Brasil offered commercial and competitive intelligence studies, with indications on potential markets, sectors, scenarios and global movements of foreign trade and business opportunities. In addition to prioritizing traditional markets, the agency also prospected new markets for Brazilian products and services based on market intelligence studies.

In 2013, the agency expanded its Market Intelligence program in order to increase the capillarity of the services provided, supporting sectoral strategic planning, and offering strategic information through a portal. The actions developed that year were the following (APEX-BRASIL, 2014, p. 21):

- Customized Commercial Intelligence: customized surveys for companies considered to have great export potential, with a view to identifying target markets.
- Profile and Commercial Opportunities of International Markets: studies of the economic and commercial profile of international markets indicating opportunities for Brazilian exports.
- Export Profile of Brazilian States: analysis of the export basket of Brazilian states and identification of international markets with potential for commercialization of local products.
- Export Profile of Brazilian Productive Sectors: mapping the characteristics of Brazilian export sectors and identification of target markets.
- Georeferenced Market Assessment System: uses indicators to select destinations for Brazilian exports and investments, in order to collaborate with the decisions of public and private managers related to foreign trade.

The development of sectoral projects found another point of support in the strategic plans. For each management contract signed between the Agency and the Direct Administration body, a strategic plan was defined for the defined period. Thus, for the 2011-2015 five-year period, the Strategic Plan defined seven programs for the agency's activities – Market Intelligence and Business Strategy; Business Qualification; Strategies for Internationalization; Business Promotion; Competitiveness, Innovation and Sustainability; Attraction of Foreign Direct Investment; and Facilitation for International Business – which is also in line with the 2015-2018 National Export Plan.

Regarding this Plan, its objective at the time was “to stimulate the resumption of economic growth, diversification and the addition of value and technological intensity in Brazilian exports” (BRASIL, 2015). The creative sectors were not included among the sectoral complexes of goods (unlike the Fashion sector and others contemplated by Apex-Brasil's sectoral projects). However, cultural and creative activities were considered among the strategic services

with export potential for some of the markets considered a priority in the document, namely: South Africa, United States, Germany, United Kingdom, France, Argentina, South Korea and China. The main services considered for action within the Plan, in these markets, were, in general: Audiovisual production, support and related services; artistic performance services and other artistic services; Assignment of copyright and related rights; Assignment of industrial property rights; and other professional and telecommunications services.

In relation to programs for the export of goods and services maintained by the Ministry of Culture, between 2013 and 2018, actions focused on the participation of entrepreneurs and professionals at global creative markets. However, an apparent strategic line that strengthened the policies was lacking, and the context was one of changes in the structures of the Secretariat of Creative Economy. In this period, for instance, Brazil took part in a Southern American initiative to organise the Southern Cultural Industries Market (MICSUR), which happened in Argentina in 2014, Colombia, 2016, and Brazil, in 2018, held in partnerships between the Ministry of Culture, the Ministry of Foreign Affairs, Apex-Brasil and SEBRAE, the Brazilian SME Support Service.

Between 2014 and 2016, the Ministry of Culture began to organise public calls specifically to support the participation of Brazilian entrepreneurs in highly visible markets abroad, such as Arco Madrid, Museum Connection, Womex, Guadalajara International Book Fair. Part of these actions was carried out in partnership with Apex-Brasil, through sectoral projects maintained by the agency.

In 2018, the Manual for the Export of Cultural Goods and Services was launched, aimed at the audiovisual sectors (TV and digital media, cinema, advertising), electronic games and music. The Manual expected to guide creators and producers on the best ways to export and which tax rules to follow, in addition to encouraging new entrepreneurs to seek to export their productions.

The government which took office in Brazil in January 2019 extinguished the Ministry of Culture. While the secretariat structures were maintained, the culture topic lost importance in the governmental and decision-making agenda. Specifically, the Secretariat of Creative Economy was left without a responsible in charge until October 2019. That year, articulations were made for the participation of a delegation of Brazilian entrepreneurs in Micsur 2020, which would be held in Uruguay, but the event was cancelled due to the Covid-19 pandemic. In 2020, with the Covid-19 pandemic, initiatives aimed at the foreign market were interrupted, and the Secretariat directed its work towards the operationalization of the Aldir Blanc Law, approved by the National Congress and which directed emergency resources to cultural agents and creative entrepreneurs in the Brazilian states and municipalities.

What is possible to detect is that, during the period in analysis, there were some actions that provided some support to entrepreneurs who intended to export their services and goods. However, this support did not meet an integrated organisation among the institutions. In the Brazilian case, actions between government institutions do not follow a joint plan, given that each entity has its own planning and priorities, and only in some situations seeks out other entities for specific partnerships. Although the search for dialogue and the participation of different entities during the structuring of the Secretariat for the Creative Economy and, consequently, during the elaboration of the SEC Plan, these initiatives were not able to create a culture of participatory planning among the agencies involved.

In this context, even though there was a search by the Ministry of Culture for partners to build a perennial strategy, a movement in the opposite direction was lacking. Thus, the formulation of public policies for the creative sectors in Brazil over the period was characterized by isolated initiatives, in which each institution sought to accomplish its legal competences,

without seeking a systemic strategy that could lead to a union of efforts for the development of common actions in a coordinated way. One of the differences to Chilean experience is the fact that in the following analysed country, it was possible to constitute a committee of ministers to design and implement public policies for the creative economy, dealing with the subject in a transversal way. In the case of Colombia, the same was done, as will be seen later. In both cases, the committees were formally established and aim to bring together different institutions that contribute to the development agenda of the creative sectors, acting transversally.

3.2 INSTITUTIONAL FRAMEWORK OF PUBLIC POLICIES FOR THE CHILEAN CREATIVE SECTORS

In Chile, public policies for culture have been structured in quinquennial plans. Here the analyses are focused on two of them: the 2011-2016 Plan and the 2017-2022 Plan. Besides, the National Plan for Fostering the Chilean Creative Economy 2017-2022, which can be considered an outcome of the quinquennial plans, will be also analysed.

The Cultural Policy 2011-2016 brings in its values the respect for a State that facilitates opportunities for access to culture and subsidiary to creative activity, which contributes to the development of the country, the promotion of cultural exchange in a globalised world, and the internationalisation of Chilean culture. The document was produced by the National Council for Culture and Arts, the institution responsible for carrying out Chilean cultural policies. The council was replaced by the Ministry of Cultures, Arts and Heritage, in 2018, after a long public consultation process.

The Cultural Policy 2011-2016 defines objectives, which guide the policy in medium or long terms, purposes, which indicate the expected results for each objective, and strategies, in which the paths to reach the results are presented. The strategies, however, do not come with detailed targets or other indicators that show how they will be put into practice. After editing the Policy, the National Council for Culture and Arts developed strategies to some of the purposes listed.

In 2012, the Strategic Plan for the Internationalisation of Chilean Music was launched. In 2013, the Study of Good Practices for the Internationalisation of Performing Arts in Chile: Diagnostics of Experiences Linked to Public Funds and FITAM (*Fundación Teatro a Mil*) was published. This document mapped out the Chilean situation in the performing arts, facilities and challenges for exports, main destination countries and more adequate strategies for internationalisation, having as a perspective both the work carried out within the scope of public funds and the Teatro a Mil Foundation (CHILE, 2013).

One of the milestones of this intergovernmental approach towards creative economy matters was the creation, in 2015, of the Interministerial Committee for the Promotion of the Creative Economy (at the time chaired by the National Council for Culture and Arts, now under the responsibility of the Ministry of Cultures, Arts and Heritage), which brings together seven ministries: Economy, Development and Tourism; Finance; Foreign Affairs; Education; Work and Social Security; Agriculture; and Social Development (CHILE, 2017a).

The Cultural Policy from 2017 to 2022 was prepared considering the history of policies previously developed and also the imminence of the transformation of the National Council of Culture and Arts into a Ministry, which occurred in 2018, through a specific law. The document reinforced the need for interinstitutional coordination aiming at the internationalisation of artists from Chilean regions and those who stand out at the national level. The concept of internationalisation adopted by the CNCA “refers to the promotion, outside national borders, of

cultural and artistic expressions of a country. This implies an active role of the State in the identification, appreciation, and subsequent promotion of local expressions to be shown abroad” (CHILE, 2017a).

Also in 2017, which was an important year to the agenda setting in Chile, the National Plan for Fostering the Chilean Creative Economy was published, as a result of the work of the Interministerial Committee for the Promotion of the Creative Economy. The Plan defines a methodological and conceptual framework on the creative economy, adapting Throsby's model of concentric circles from the mapping of the production chain carried out in Chile (CHILE, 2017b) and reinforcing the need for interinstitutional articulation so that actions and budget are used effectively, considering the characteristics of the creative sectors. The sectors prioritized in the Plan are presented in Table 5.

Table 5 - Creative activities covered by Chilean policy

Group	Activities
Core creative group	Performing Arts (theatre, dance, circus), Visual Arts, Crafts and Photography
Industrial creative group	Film, Music and Publishing
Creative group associated with media	TV, Radio, Press Media
Creative group of support	Architecture, Design, Advertising and IT media

Source: Chile (2017b, p. 22-23).

As for international trade, the National Plan for Fostering the Chilean Creative Economy presents data on Chile's characteristic as a net importer of creative goods: these imports represent 5% of total imports, while creative exports represent only 0.3% of total exports. For the policy makers, Chile has comparative advantages to expand its export capacity and stand out in exports in the South American context. This is due to the high proportion of skilled workers in the sector (2.1% of the total) and the high rate of sales to the countries of the region, which reaches 94% of the total, for creative goods (CHILE, 2017b).

The promotion of exports of creative goods and services from Chile is the responsibility of both the Ministry of Culture and the Program for the Promotion of Chilean Exports (ProChile), linked to the Ministry of Foreign Affairs. On its website, ProChile dedicates a session exclusively to Creative Industries. The highlighted sectors are performing arts, visual arts, animation, electronic games, graphic and narrative illustrations, music, fashion, publishing and audiovisual.

Created in 1974, ProChile aims to contribute to sustainable development through the internationalization and promotion of goods and services, in order to diversify the export basket, including a gender perspective, to attract foreign investment and promote tourism, as well as to strengthen the country's image.

The focus of ProChile's strategy is to support exporting companies, primarily micro, small and medium-sized ones. It works at all stages of internationalization, offering specific services depending on where the company is located. Market intelligence is part of the tools for all phases, but for beginners, the focus is on training. For companies that already export, market prospecting and diversification work is carried out, while for the more mature ones, maintenance, installation, and investment are also carried out in international markets.

Within the structure of the Agency, there is a division by geographic regions and by priority themes, namely: Agriculture and Food, Industries 4.0, Services and Tourism, and Creative Economy. The highlighted sectors are performing arts, visual arts, animation, electronic games, graphic and narrative illustrations, music, fashion, publishing and audiovisual. Support for the creative sectors by ProChile began in 2004 with support for the audiovisual and

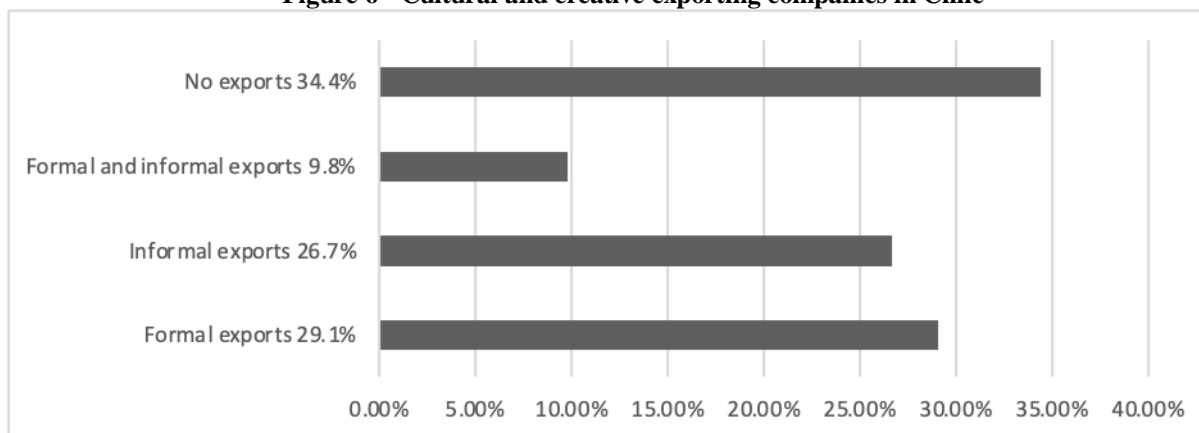
publishing sectors, followed by a study of other creative sectors to be supported. With the publication of the National Plan for Fostering the Chilean Creative Economy, a specific department was created to take care of the creative industries.

Over almost 20 years of support to the creative sectors, it was found that some of them, such as audiovisual and music, have well-defined brands and positioning strategies and, therefore, have already reached export maturity and are in a better position for internationalization than others, such as fashion. As the Export Mapping of the Cultural and Creative Industries in Chile (*Mapeo Exportador de las Industrias Culturales y Creativas en Chile*, CHILE, 2022, p. 95) informs, the creative sectors in general are in a process of consolidation, growth and professionalization.

According to the Head of the Creative Economy Department at ProChile, Raúl Vilches, Chilean companies need to export, given the challenges related to the size of the domestic market. He also recalls that, in the case of the creative sectors, the presence in large market sector events allows the promotion of exports not specifically in a given country, but for different markets, given the varied number of participating players.

Even so, there are a large number of companies that do not export and another expressive number that export informally, which affects the country's export numbers. As the data in Figure 6 shows, from a sample of 450 companies, almost 35% do not export and another 27% export informally (CHILE, 2022, p. 31), which suggest that Chilean strategies can be improved to provide a better range of actions and the professionalization of the creative sectors that wish to export.

Figure 6 - Cultural and creative exporting companies in Chile



Fonte: Chile (2022).

Another important partner for the internationalisation and promotion of Chilean exports is Santiago's Chamber of Commerce. Together with the private institution, the Strategic Plan for the Internationalisation of Chilean Music had already been published, in 2012, and the Study of Good Practices for the Internationalisation of Performing Arts in Chile, in 2013. In 2017, the Manual for the Exporter of Creative Services was published, aiming at supporting and guiding cultural agents in relation to the regulatory and tax framework that regulates the exports of services from five sectors – audiovisual, music, publishing, design and performing arts.

The implementation of the National Plan for Fostering the Chilean Creative Economy faced difficulties arising from the change of government in 2018 and, later, the political manifestations of the second half of 2019 and the Covid-19 pandemic in 2020. Since 2019 the

Interministerial Committee for the Promotion of the Creative Economy has not gathered, which has delayed the decision-making agenda. However, the Executive Secretariat responsible for the operation of the Plan is still working. Because of that and despite those occurrences, in 2020, Chile launched a specific webpage to creative sectors, with data, information, public calls and artists' showcase⁴.

Thus, despite the difficulties and according to what was shown before, there were some achievements in Chilean public policy. It was possible to notice that 2017 was an important year, since it was when two of the most important frameworks on public policies to the country – the Cultural Policy 2017-2022, which led to the transformation of the CNCA into the Ministry of Culture and Arts, and the National Plan for Fostering the Chilean Creative Economy, which established the guidelines for the public policies. Additionally, it is important to recall that these guidelines were already devised in a context of governmental transversality, since the Interministerial Committee for the Promotion of the Creative Economy had been created two years before and it was responsible for gathering all the actor in order to elaborate the Plan. In the next case, it will be possible to compare another experience, launched by Colombia, which demonstrates an effort to develop a perennial policy towards the creative sectors.

3.3 INSTITUTIONAL FRAMEWORK OF PUBLIC POLICIES FOR THE COLOMBIAN CREATIVE SECTORS⁵

In Colombia, the integration of public policies for the creative economy among different government agencies and the private sector is based on transversal policy focusing on formally outlined strategic points. This is internalised through legislation, a multi-annual plan and an integral policy, which seeks to include actions in all the strategic lines provided for in the legal documents. This context will be considered in the analysis of this section.

The 1991 Constitution defined Colombia as a pluri-ethnic and multicultural country. One of the goals of the Constitution is the protection and promotion of Colombian culture. From that moment on, supported by the Constitutional chart, Colombia saw the spread of the legal framework related to Culture and creative industries in the beginning of the 21st century, which culminated with the promulgation, in 2017, of Law 1834, the so-called *Ley Naranja* (Orange Law⁶) (COLOMBIA, 2017).

In 1997, the General Law for Culture was published, creating the Ministry of Culture and two incentive funds (one for cinema, called ProImágenes, immediately implemented, and the other one for the other sectors, called Fondo Mixto, only implemented in 2019). In the following year the National Cultural System was instituted by decree (COLOMBIA, 2010). Sectoral laws were published to promote books and reading (2003), films (2003) and Performing Arts (2011), as well as specific economic incentive legislation for cultural heritage, libraries, publishing, films, and public entertainment sectors. Colombia also adhered to the UNESCO Convention on

⁴ See <https://ec.cultura.gob.cl/>, <https://mercadocul.cultura.gob.cl/> and <http://observatorio.cultura.gob.cl/>.

⁵ Part of this section was built based on the work presented during the International Seminar on the Economics and Policies of Culture and the Creative Industries, which was held by Itaú Cultural Observatory in partnership with the Federal University of Rio Grande do Sul (UFRGS) and with the United Nations Educational, Scientific and Cultural Organization (UNESCO). The event took place on 6th-8th October 2021, online.

⁶ In Latin America, the term “*economía naranja*” has been used to refer to the creative economy. In Colombia, particularly, the term is widely used. Duque and Buitrago (2013) defined the “*economía naranja*” based on three aspects: it has creativity as a raw material, it establishes a relationship with intellectual property rights and it has a direct role in a creative value chain.

the Protection and Promotion of the Diversity of Cultural Expressions (2005 Convention) and instituted the first ten-year plan for Culture, the National Culture Plan 2001-2010 (REIS, 2021).

This legal framework and the public policies implemented in this period were important bases for the new legislation that emerged in the second half of the 2010s, having the *Ley Naranja* as a milestone. The *Ley Naranja* defined seven major themes as strategies for public management actions and policies, called the “7i”: information, institutions, industry, infrastructure, integration, inclusion, and inspiration.

This law represented the starting point for the consolidation of a structure to support and promote the creative industries. For one thing, the National Council for Creative Economy (*Consejo Nacional de Economía Naranja* – CNEN) was created, led by the Ministry of Culture. The CNEN is composed of seven ministries and five more national bodies (COLOMBIA, 2019). The institutions that constitute the CNEN carry out strategic actions based on the Comprehensive Policy for Creative Economy (Política Integral de Economía Naranja) in Colombian territories, in coordination with local agents.

And for another, the Council drew up guidelines for the implementation of two strategic frameworks – the National Development Plan 2018-2022 (NDP) and the Comprehensive Policy for Creative Economy. In the National Development Plan (NDP), creative sectors are defined based on the classification made by the Unctad (2010, p.8), but organising activities into three distinct groups: Arts and Tangible and Intangible Heritage, Cultural Industries and Functional Creations, as shown in Table 6.

Table 6 - Creative Sectors in Colombia

Group	Activity
Arts and Material and Intangible Heritage	Visual Arts
	Performing arts and shows
	Cultural tourism and tangible and intangible cultural heritage
Cultural industries	Arts, culture, and creative economy education
	Editorial
	Phonographic
	Audiovisual
	News agencies and other information services
Functional creations, new media, software content	Digital media, software content
	Design
	Advertising

Source: Own elaboration based on the National Development Plan (COLOMBIA, 2019, p. 825)

Following the recommendations of the *Ley Naranja* and the NDP, Colombia's Comprehensive Policy for Creative Economy is also structured based on the “7i”, and each of the seven lines comprises different strategies (COLOMBIA, 2020b). Despite the efforts of legislators to organise the law in these seven axes, this structure brought some difficulties related to the moment of definition of alternatives, since the “7i” did not have a defined technical content, they were open to interpretation.

To support the international trade of Colombian creative goods and services, coordination between agencies and actors proved to be even more fundamental. Initially, exports were driven by the private sector. Big drivers such as Film, Books and IT were catered to by Proimagenes and Procolombia along with the private sectors. Then the Ministry of Culture decided to foster exports from independent producers in all sectors combined, with the support of a public partner

specialized in foreign trade. With the Comprehensive Policy for Creative Economy, the functions were better defined, and ProColombia's role became clearer and wider in the promotion of all creative industries. Adriana González Hassig, former manager of the Group of Entrepreneurship at the Ministry of Culture of Colombia from 2010 to 2021, interviewed for this article, affirmed that the great challenge was the multilevel articulation among different sectors, most of them without a previous connection with culture and creative industries.

Until 2018, ProColombia's work with the cultural and creative sectors focused mainly on cultural promotion through tourism, in addition to some specific actions, such as the support provided by the Agency to the Ministry of Culture in Colombia's participation in MICSUR and in the organization of that market in Bogotá in 2016, and in the organization of missions of Colombian entrepreneurs to large sectoral markets, such as Rio Content Market (today Rio2C), Womex, International Book Fairs of Frankfurt and Guadalajara. With the advent of *Ley Naranja*, the Agency began to outline a more articulated action with the cultural and creative sector.

The Comprehensive Policy for Creative Economy defines some specific strategies for the internationalisation of Colombian entrepreneurs and creative ventures, based on three pillars – exports, investment attraction and cultural tourism – which coincide with ProColombia's competences. Among the strategies envisaged, the promotion of exports stands out, through the expansion of support for the design of internationalisation strategies and training activities for exports.

In addition, there are strategies designed to strengthen national and international platforms and markets for the circulation of cultural and creative goods and services. The initiatives should develop the offer according to the characteristics of each market – local or external –, improving the ability to sell products and services (COLOMBIA, 2020b). Market intelligence studies are included in the internationalisation strategy, with analysis of demand and consumption patterns in potential markets.

During the pandemic, Colombia organised its webpage with all the programs available to creative entrepreneurs. The webpage also offers information about legal framework, funds, public calls and data and economic reports provided by the National Department of Statistics (DANE), which is part of the CNEN and responsible for the Colombian Culture and Creative Economy's Satellite Account⁷.

As it could be seen in the section about Chile, Colombian experience shows an effort to structure a permanent policy enforced by a legal framework and based on the leadership of the Ministry of Culture. As a matter of coincidence regarding Chile's experience, 2017 was also a relevant year to creative policies in Colombia, considering that *Ley Naranja* came into force that year and with it a series of other guidelines that built the legal and institutional framework to launch initiatives to foster Colombian creative economy. One of the major achievements of the law was to set the cornerstone for the creation of the National Council for Creative Economy (CNEN), which consolidated a transversal system to elaborate and implement policies to creative sectors in Colombia. After the presentation of the three former cases, the next section will show the similarities of each experience as well as the most relevant differences among them.

⁷ See: <https://economianaranja.gov.co/oferta-nacional/> and <https://economianaranja.gov.co/reporte-naranja-dane-minicultura/>.

4 COMPARISONS OF THE THREE CASES

The results of this research suggest that Brazil, Chile and Colombia have been seeking to foster their exports of cultural goods and services following different strategies, albeit with some similarities.

The first thing to be pointed out refers to export data. In the Brazilian case, from 2016 onwards, an increase in exports can be noted, however, the available figures show a large concentration in only two sectoral extracts related to products. Despite the need to seek other sources of data to deepen the analysis, this seems to indicate the need for more accurate work to diversify the export basket in relation to the creative sectors. In Chile, the data indicate a slight growth in exports from 2017 onwards. However, these data do not account the informal exports pointed out by ProChile studies. If informality in exports is treated as a priority in the institution's policies, the numbers of Chilean exports of goods and services may present an increase in the coming years. In the case of Colombia, what was noted was that, despite the country investments in the production of data and indicators for culture and the creative economy in general, there is no consolidated set of studies and information for foreign trade yet.

Another point of comparison refers to the legal and institutional framework that each country managed to build over the years. Both in Chile and Colombia, there is a structured coordination among different public sectors based on documents and laws. In the case of Chile, this coordination happens among the Ministry of Cultures, Arts and Heritage, the Ministry of Foreign Affairs and ProChile. Moreover, there is an interministerial committee which congregates seven different governmental institutions under the coordination of the Executive Secretariat of Creative Economy. In the case of Colombia, the coordination occurs at the level of the National Council for Creative Economy, which is composed by seven ministries and other five entities, under the leadership of the Ministry of Culture. Specifically, about internationalisation and promotion of exports, the Ministry of Culture articulates with the Ministry of Commerce and ProColombia. In Brazil, by contrast, the partnership among the Ministry of Culture, the Ministry of Foreign Affairs and Apex-Brasil depends on the project, without any permanent structured coordination.

In all three cases, the participation of private sector entities proved to be fundamental for the promotion of exports, since they were responsible for suggesting markets and planning the companies' participation. In Chile and Colombia, the chambers of commerce of both capitals are important actors as well as sectoral institutions. In Brazil, sectoral associations have been important actors in projects launched by Apex-Brasil to promote the exports.

A striking difference among these cases is the way each country deals with information and trade promotion, which apparently could indicate how strategically the subject is treated by the government. Both Colombia and Chile present their studies and documents on their web pages: in Chile's national observatory page, it is possible to find the studies, reports, manuals, and policies launched since the creation of the National Council. There is also a page, remodelled during the pandemic, dedicated to Chile's creative economy, which promotes services and goods and informs about public calls and available funds. Colombia's web page shows all the documents related to the policies designed and under implementation, data from the National Statistic Department, funds, and open public calls. Brazil does not have any organised digital environment and information ends up being very dispersed.

Table 7 summarises the characteristics of cultural policies in Brazil, Chile and Colombia described in the three previous sections.

Table 7 - Comparison about the characteristics of public policies

Factor	Brazil	Chile	Colombia
Frameworks	National Plan of Culture 2010-2020 SEC Plan 2011-2014	Cultural Policy 2011-2016 Cultural Policy 2017-2022 National Plan to Foster Chilean Creative Economy 2017-2022	Ley Naranja National Development Plan 2018-2022 Comprehensive Policy for Creative Economy
Interministerial committees	None	Seven ministries – without meetings since 2019	Seven ministries + five autarchies
Public partners	Ministry of Culture Ministry of Foreign Affairs Apex-Brasil	Ministry of Culture Ministry of Foreign Affairs ProChile Corfo	Ministry of Culture Ministry of Commerce Procolombia
Private partners	Sectoral associations	Santiago's Chamber of Commerce	Bogota's Chamber of Commerce
Digital presence	None	https://ec.cultura.gob.cl/ http://observatorio.cultura.gob.cl/ https://chilecreativo.cl/	https://economianaranja.gov.co/oferta-nacional/

Source: Author.

The last analysis topic refers to the idea that each of the countries uses export promotion for different reasons. In the case of Chile, exporting is a way of overcoming domestic limitations, given the country's size and internal market restrictions. In the case of Colombia, exports are reflected in the country's image and in encouraging cultural tourism. However, there is still a latent need to strengthen the domestic market. And in the case of Brazil, it is linked to the creation of an exporting culture and the fact that the country's image is strongly linked to its culture. As pointed out by the former Director of Productive Strategy at the Ministry of Culture in the 2016-2018 period, Ana Letícia Fialho, being connected to the world and exporting is also an issue that is part of contemporary times.

The transversality of bureaucratic structures in Chile and Colombia in cultural policies seems to be better arranged in relation to the domestic field. Important advances can be seen, for example, in the institutions' digital presence, with a relevant role in promoting the creative sectors, as well as in the production of data and information and its dissemination to the public, although improvements would be necessary. In Brazil, currently, there is no strategy to come up with solutions to the lack of coordination in data production or to give Brazil a strong digital presence. Concerning promotion of exports in Brazil, it was possible to take into account that it is necessary to increase and diversify the current exports basket of creative goods and services. However, even considering the importance of transversality in public policies to creative sectors, it is not possible to affirm that this fact only could contribute to increase exports as the data of Chile and Colombia may indicate.

Recalling that 2017 was a significant year for the consolidation of the institutional framework in both Chile and Colombia, and concerning data related to exports, it can be noted that there were discreet advances between 2017 and 2019 with a fall in 2020. There were other factors, however, that may have hindered the growth of countries in the external field, such as the Covid-19 pandemic and the political crises of 2019 in Chile and 2021 in Colombia. An analysis of a possible positive relation between the formalized transversality between institutions and an improvement in the results in the trade balance of creative goods and services could be done in a few years, with more information available to compose a historical series.

5 FINAL CONSIDERATIONS

This research set out to investigate the phase of formulation of public policies regarding the export of creative goods and services in Brazil, Colombia and Chile as a means to know what the strategies of the governments of these countries have been to promote creative exports from 2011 to 2020. The main objective was to compare the strategies of the three countries during the considered period, and the specific objectives were:

- a) to map out the bureaucratic-institutional structure used to promote exports of creative goods and services in these countries;
- b) to map out and evaluate their policies during the studied period; and
- c) to reflect upon the role of the State in promoting the cultural sector regarding a socio-economic development strategy.

The working hypothesis was that Brazil, Chile and Colombia have developed projects and plans for their export policies for creative goods and services. Nevertheless, in comparison to Chile and Colombia, Brazil did not have an effective articulation among government and civil society to design export strategies.

In this context, the research found out that Brazil, Chile, and Colombia have followed different strategies, although it was possible to find some similarities. Chile and Colombia managed to develop a legal and institutional framework which was decisive so that institutions worked in a transversal way, while in Brazil the current legal and institutional frameworks were not capable of producing the same result. It should be considered that the institution of the legal and institutional frameworks in both Colombia and Chile, though an achievement, did not reflect yet in robust export gains.

The period in which the research was conducted, especially the year 2022, found government changes in the three countries studied, which, to a greater or lesser extent, made it difficult to collect data and search for qualitative information on the policies formulated during the studied period. It is understood that it would be interesting to carry out a subsequent analysis that could deal with the continuity of the formulated policies. A possible next survey may also consider to investigate the implementation and evaluation phases of public policies, which will allow to deepen in the evaluation of the results of the policies pointed out in this work.

Another issue that may be further investigated in future research concerns the use of market intelligence in export promotion strategies. Experiences of using market intelligence could be found in export promotion bodies of the three countries, but it was not possible to delve into the mechanisms used in the three cases.

Finally, some topics that were not addressed in this research may compose a future work. The language issue is one of them. An eventual analysis could verify the obstacles imposed by the language, that is, how much the language favours or not the insertion of a country in foreign markets. In addition, the budget available for export policies can also be analysed in a future work, which was not possible in this research.

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APPENDIX A - LIST OF INTERVIEWEES

Brasil

- Christiano Lima Braga – Manager of Sectoral Projects at Apex-Brasil, from 2005 to 2019.
- Claudia Sousa Leitão – Creative Economy Secretariat of the Ministry of Culture from 2011 to 2013
- Luciana Lima Guilherme – Director of Entrepreneurship, Management and Innovation at the Creative Economy Secretariat of the Ministry of Culture from 2011 to 2013
- Ana Letícia do Nascimento Fialho – Director of Productive Strategy at the Secretariat for the Economy of Culture of the Ministry of Culture, from 2016 to 2018.
- Adam Jayme Muniz – Diplomat, Director of the International Promotion Department from 2016 to 2018 and International Advisor to Ancine in 2019.

Chile

- Sofía Lobos Araya – Executive Secretariat for Creative Economy of the National Council of Culture and Arts and later of the Ministry of Culture and Arts, until 2019
- Carolina Pereira - Executive Secretariat for Creative Economy of the National Council of Culture and Arts and later of the Ministry of Culture and Arts, from 2019
- Raúl Vilches – Director of ProChile's Subsector of Creative Economy
- Felipe Mujica - Director of Programs and Projects · Chilecreativo - Strategic Program for the Creative Economy of the Production Promotion Corporation of Chile (Corfo)

Colombia

- Adriana González-Hassig – Manager of the Group of Entrepreneurship at the Ministry of Culture of Colombia from 2010 to 2021
- Carlos Mora – Coordinator at the Department of National Statistics Administration (DANE)

ANNEX A - APEX-BRASIL'S MAIN SECTORAL PROJECTS DEVELOPED FROM 2011 TO 2020 – CREATIVE ECONOMY AND SERVICES AND FASHION SECTORS

Sector	Sectoral Project	Partner	Objective	Target	Agreements
Creative Economy and Services	Latitude - Promoção das Artes Contemporâneas Brasileiras (Latitude – Promotion of the Brazilian Contemporary Arts)	ABACT – Associação Brasileira de Arte Contemporânea (Brazilian Association of Contemporary Arts)	Promote Brazil's position as a leader in Latin America in terms of visibility and exports of works of contemporary art, expanding Brazil's participation in the international market with impactful actions, mainly in opinion-forming countries.	Contemporary art galleries, which carry out an effective and active work of representing Brazilian artists, that is, they promote and care for the image of artists in the international market, going far beyond the simple sale of works of art.	2011-2013; 2013-2014; 2015-2017; 2017-2019; 2020-2022
	Brazilian Publishers - Promoção do Conteúdo Editorial Brasileiro (Promotion of the Brazilian Publishing Content)	CBL – Câmara Brasileira do Livro (CBL – Brazilian Book Chamber)	Internationalize Brazilian publishing houses, promoting constant dialogue between the sector and the foreign market, and expanding the volume exported and the insertion of the Brazilian publishing product in the international market.	Publishers that already have or intend to have an international presence, through the purchase and sale of copyrights or by exporting the project or finished product.	2010-2012; 2012-2014; 2014-2016; 2016-2017; 2017-2019; 2020-2022
Creative Economy and Services	BRAZILIAN TV PRODUCERS/ Brazilian Content - Promoção de Exportação da Indústria Brasileira de Audiovisual (Promotion of exports from the Brazilian Audiovisual Industry)	BRAVI – Brasil Audiovisual Independente (Brazil Independent Audiovisual)	Expand and consolidate the participation of independent production in the Brazilian audiovisual sector in the international market. Independent production companies and distributors of audiovisual products for television and new media.	Independent production companies and product distributors audiovisual for television and new media.	2010-2012; 2012-2014; 2014-2016; 2016-2018; 2018-2020
	CINEMA DO BRASIL - Promoção da Indústria Audiovisual (Promotion of	SIAESP – Sindicato da Indústria Audiovisual do Estado de São Paulo	Positioning the image of Brazilian film production internationally and consolidate the process of internationalization	Brazilian companies that produce audiovisual, sell rights to audiovisual productions and	2010-2012; 2012-2014; 2014-2016; 2016-2017; 2017-2019

Sector	Sectoral Project	Partner	Objective	Target	Agreements
	Audiovisual Industry)	(Syndicate of Audiovisual Industry of the State of São Paulo)	of the film industry in Brazil.	provide infrastructure services, in addition to distributors and film festivals.	
	FILMBRAZIL - Promoção de Exportação de Obras Audiovisuais (Promotion of Exports of Audiovisual works)	APRO – Associação Brasileira da Produção de Obras Audiovisuais (Brazilian Association of Audiovisual works)	Increase Brazilian exports of advertising production services, position the sector's brand (FilmBrazil) in the international market and expand and diversify the sector's export base.	Image, sound, post-production and interactive media producers and infrastructure rental companies.	2010-2011; 2012-2014; 2014-2016; 2015-2017; 2018-2020; 2020-2022
	MÚSICA DO BRASIL - Exportação da Música do Brasil (Brazilian Music Exports)	BM&A – Brasil, Música & Artes	Expand the participation of companies in the sector in the international music trade and in emerging productive niches, including new media and shows. Encourage Brazilian companies to operate in other markets where music is not the final product, such as video games, movies and advertisements.	Micro, small and medium-sized companies that operate in the independent Brazilian music market, artists and other holders of copyright that seek the internationalization of their musical goods and services.	2010-2012; 2013-2015; 2015-2017; 2018-2020
Creative Economy and Services	Brazil Games	ABRAGAMES - Associação Brasileira das Desenvolvedoras de Jogos Eletrônicos (Brazilian Association of Electronic Game Developers)	Support Brazilian companies that develop digital games, in order to promote their products and services in the international market, highlighting their excellence, creativity and innovation.	National companies that develop and distribute digital games	2013-2014; 2014-2016; 2016-2016; 2016-2018; 2018-2020; 2021-2023
Fashion	Internacionalização da Moda Brasileira (Internationalization of Brazilian Fashion Industry)	ABEST – Associação Brasileira de Estilistas	Expand, develop and consolidate the presence of Brazil's image and fashion creation product in the international market.	Brazilian companies in the fashion creation segment focused on the development of superior quality products, with their own design, committed to the Brazilian lifestyle and focused on internationalization	2010-2012; 2012-2014; 2014-2015; 2016-2017; 2017-2019; 2019-2021

Sector	Sectoral Project	Partner	Objective	Target	Agreements
				through brand building.	
	TEXBRASIL – Programa Estratégico da Cadeia Têxtil Brasileira (Strategic Program of the Brazilian Textile Chain)	ABIT – Associação Brasileira da Indústria Têxtil e de Confecção (Brazilian Textile and Clothing making Industry Association)	Enlist and support companies in the textile and clothing chain for an organized offer of Brazilian products abroad, aiming at increasing sector exports and increasing the visibility of the Brazilian fashion industry.	Brazilian exporting and potentially exporting companies in the textile, bedding, table and bath and clothing sectors.	2010-2012; 2012-2013; 2013-2014; 2014-2016; 2017-2019; 2019-2021

Source: Elaborated by the author based on data provided by Apex-Brasil.

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