



BEHIND THE CAMERA: **CREATIVITY AND INVESTMENT FOR LATIN AMERICA AND THE CARIBBEAN**

Learnings from Conversations
with Key Players in the Audiovisual Sector

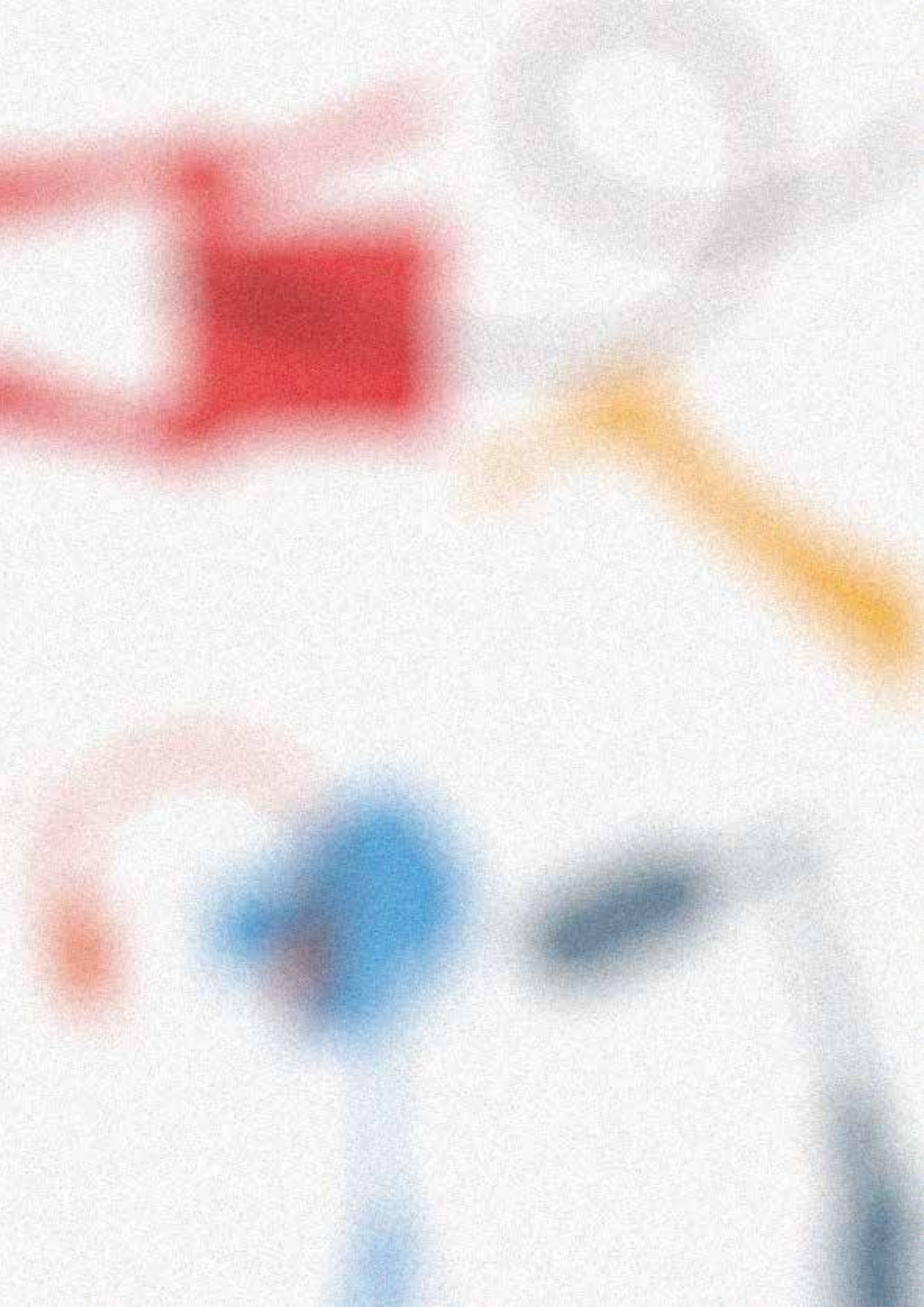


TABLE OF CONTENTS

| | |
|--------------|---|
| P. 04 | A CONVERSATION SPANNING THE REGION: NOTES ON OUR METHODOLOGY |
|--------------|---|

| | |
|--------------|--------------------------|
| P. 07 | EXECUTIVE SUMMARY |
|--------------|--------------------------|

FOREWORD

| | |
|--------------|--|
| P. 09 | AUDIOVISUAL CONTENT: CAPITAL IN THE DIGITAL ECONOMY |
|--------------|--|

| | |
|-------|--|
| P. 11 | Lights, Camera, Introduction! |
| P. 16 | Recent Announcements of Investment in Local Content Production |

PART I

| | |
|--------------|---|
| P. 20 | LEGACY MODELS AND NEW PATHS FORWARD IN THE AUDIOVISUAL SECTOR: FROM INDUSTRY DIGITALIZATION TO THE RISE OF STREAMING |
|--------------|---|

| | |
|-------|---|
| P. 21 | Historical Background: An Audiovisual Century |
| P. 22 | The Rise of the Small Screen |
| P. 23 | Streaming Makes an Entrance |

CHAPTER 1

| | |
|--------------|---|
| P. 28 | THE RULES OF THE AUDIOVISUAL GAME CHANGE FOR AUDIOVISUAL INDUSTRY GIANTS |
|--------------|---|

| | |
|-------|---|
| P. 31 | Mexico: A New Golden Age? |
| P. 34 | "Mexico Has Quality, Variety, Price and Industry" |
| P. 37 | Colombia Emerges As an Audiovisual Powerhouse |
| P. 40 | What Are Film Incentives? |
| P. 44 | Brazil: A Major Industry Faces New Horizons |
| P. 48 | Brazil: Marginal Voices Take Center Stage |
| P. 50 | Argentina: Unleashing Potential |
| P. 52 | Chile: Too Little of a Good Thing? |
| P. 55 | Venture Capital for the Audiovisual Sector |
| P. 56 | Latin America and the Caribbean at the Oscar Awards |

CHAPTER 2

| | |
|--------------|---|
| P. 60 | NEW EMERGING CENTERS—NEW OPPORTUNITIES |
|--------------|---|

| | |
|-------|--|
| P. 62 | From the Beaches to the Screen: Not Content With Offering Services, the Dominican Republic Wants to Strengthen an Industry |
| P. 64 | Córdoba and Mendoza Want to Remind the World That There Is an Argentinian Audiovisual Industry Beyond Buenos Aires |
| P. 66 | The Case of Uruguay: Supply Exceeds Demand (and Other Envidable But Pressing Problems) |
| P. 68 | Peru, Ecuador, Bolivia: The Andean Region as an Emerging Area |
| P. 71 | Panama's Boom is Beginning: The Panama International Film Festival (IFF), a Gate to New Opportunities |
| P. 74 | Audiovisual Central America: El Salvador, Honduras, Guatemala, Nicaragua, Costa Rica |
| P. 77 | Animation Is Not Child's Play, But an Industry with Vast Potential: A Tour Through Mexico, Brazil and Peru |
| P. 81 | Paraguayan Cinema Takes Off |

PART II

| | |
|--------------|--|
| P. 82 | A COMMON PRIORITY: INVESTING IN HUMAN CAPITAL |
|--------------|--|

CHAPTER 3

| | |
|--------------|--|
| P. 83 | WORKFORCE SKILLS WITHIN AUDIOVISUAL PRODUCTION IN LATIN AMERICA AND THE CARIBBEAN |
|--------------|--|

| | |
|--------|--|
| P. 84 | Critical Thinking, Perseverance and Curiosity: Human Skills Are More Important Than Ever in this Age of Automation |
| P. 92 | From the Artistic to the Technical: Above the Line and Below the Line |
| P. 96 | Which Are the Most Urgent Needs and Challenges Audiovisual Producers Face in Latin America and the Caribbean? A Survey of the Industry |
| P. 116 | Experiences in Audiovisual Projects Launched by the Organization of Ibero-American States |
| P. 119 | Ibermedia Program |
| P. 120 | Conversation with the Ibero-American Federation of Cinematographic and Audiovisual Producers |

CHAPTER 4

| | |
|---------------|---|
| P. 123 | JOBS IN DEMAND WITHIN THE INDUSTRY |
|---------------|---|

| | |
|--------|--|
| P. 124 | A Below-the-Line Future: A Conversation with a Sound Engineer, an Art Director, and an Expert in Filmmaking Equipment. |
| P. 126 | If Latin America Has Such a Strong Literary Culture, Why is it So Difficult to Find Screenwriters? |
| P. 129 | Drawing Reality: Visual Effects (VFX) is a Growing Sector |
| P. 132 | "Why Not Teach the Neighborhood Kids?" How to Take the Leap from Guatemala to Hollywood and Back Again |
| P. 134 | Technology Used in Video Games is Changing the Way Hollywood Makes Movies |
| P. 135 | A Philosopher, Filmmaker, Chef, Legal Assistant, PR Manager: Being a Producer in Latin America is Multi-Disciplinary by Nature |

PART III

| | |
|---------------|---|
| P. 137 | IMPLICATIONS AND RECOMMENDATIONS |
|---------------|---|

CHAPTER 5

| | |
|---------------|-------------------------------|
| P. 138 | THE SCREEN AS A MIRROR |
|---------------|-------------------------------|

| | |
|--------|--|
| P. 140 | Amplifying Voices: A Conversation with Women in the Latin American Audiovisual World |
| P. 143 | Best Practices and Spaces for Education: Diversity, Inclusion and Training |
| P. 147 | Lessons Learned and Paths to Explore |

| | |
|---------------|-------------------------|
| P. 149 | ACKNOWLEDGEMENTS |
|---------------|-------------------------|

| | |
|---------------|-------------------|
| P. 152 | REFERENCES |
|---------------|-------------------|

A CONVERSATION SPANNING THE REGION: NOTES ON OUR METHODOLOGY



This document is based on a hybrid methodology that combines primary and secondary data sources, including open data portals, reports published by national governments and the private sector, academic literature, press releases, and news media sources. It also incorporates in-depth interviews with nearly 100 key players in the Latin American audiovisual sector composed of producers, policymakers, government officials, investors, screenwriters, company directors, entertainment executives, researchers, and technical experts throughout the region. We also include the results of a survey focusing on the needs of the sector regarding skill and labor competency development to identify the below-the-line skills that we need to strengthen in the region. The survey was designed and implemented by the London-based independent consultancy Olsberg SPI.

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A FEW WORDS ON THE IADB/NETFLIX PARTNERSHIP

In recent years, the Inter-American Development Bank (IADB) has occupied a leading position in the cultural and creative industries, also referred to as the Orange Economy. From its onset, the IADB has promoted research, knowledge development, public policies, and over 300 projects aimed at supporting cultural and creative sectors. To this end, the IADB collaborates with governments, public institutions, research centers, consultants and private companies. As part of the development of this publication, the research team received support from various departments within the IADB and worked together with key stakeholders in the audiovisual sector.

Since its establishment in Latin America more than a decade ago, Netflix has worked hand-in-hand with governments, institutions and producer associations within the region to better understand how to support the development of local entertainment ecosystems. Recently, Netflix joined the Coalition for the Development of 21st Century Skills in Latin America and the Caribbean (Coalición para el Desarrollo de Habilidades del Siglo XXI en América Latina y el Caribe), led by the Inter-American Development Bank. As part of this crucial effort, Netflix provided financial support to develop this publication.

NETFLIX



EXECUTIVE SUMMARY

This document provides an overview of the audiovisual sector in Latin America and the Caribbean. It uses a hybrid methodology that combines primary and secondary research, as well as nearly 100 interviews with key stakeholders in the industry. We present a map of the region, highlighting its milestones, with a focus on public policy debates and 21st-century skills. We include conversations with emerging creators, producers, entertainment executives, as well as with members of film associations and institutions. Our goal is to kickstart a conversation on the potential of this strategic sector and explore the challenges faced by its workforce. For this purpose, it is necessary to understand where professionals train, how they join a production, and which technical skills are in greatest demand. With 2025 in sight, our region must invest in training and make the most of the opportunities presented by this growing industry.

Along the way, we sought to answer important questions regarding how the audiovisual ecosystem operates: Where do producers conduct their work? What is the average size of a production company in Latin America and the Caribbean? Where are film professionals recruited? Does the region have adequate technical skills to meet demand? Are there sufficient training opportunities? What below-the-line jobs are in highest demand in emerging markets?

Latin America and the Caribbean are on the verge of a new audiovisual boom. In 2019 alone, nearly \$5.7 billion USD were invested in audiovisual productions, which, according to Olsberg SPI, led to the creation of more than 1.6 million direct and indirect jobs. While the COVID-19 crisis has undoubtedly impacted our lives in many ways, mass lockdowns have affected the AV sector in a way never seen before, with the cancelation of numerous film shootings. However, demand for audiovisual content did not decrease. On the contrary, it continued to soar as a result of increased demand owing to new forms of content delivery, including streaming. Due to the significant expenditures it pours into local economies, the audiovisual industry can contribute to a rapid recovery of creative economies. Because of its proven ability to adapt, its resilience and its talent pool, the Latin American and Caribbean region is in an ideal position to capitalize on present circumstances.

A close examination of the audiovisual sector will reveal two important trends: streaming platforms, which are currently accessed in one out of every five homes in

Latin America, are increasingly interested in developing original content geared towards regional markets that have demonstrated a marked interest in original local content. On the other hand, there is a global demand for content produced in Latin America and the Caribbean, both in Spanish and Portuguese, which serves to highlight the region's potential as an audiovisual exporter capable of taking its stories to all corners of the world.

Countries with more mature audiovisual industries such as Brazil, Mexico, Argentina, and more recently, Chile and Colombia, are exploring ways to strengthen audiovisual production as a means to draw foreign investment in a sector that moves billions of dollars and impacts industries as diverse as tourism and construction. In Uruguay, the Dominican Republic, Panama and Peru, among other countries, new centers have emerged aiming to position themselves as competitive locations to establish film production service companies and audiovisual hubs.

Experience has taught us that legislation supporting the audiovisual industry is an important step in the right direction. However, it should not be the only one. Governments in the region face a once-in-a-generation opportunity and are in a position to capitalize on the potential impact of this industry on the economy and job creation. Moreover, there is an undeniable link between digital agendas and human capital development. It is thus essential to support public policies that dynamize the sector, seek solutions for local challenges, and help develop professionals with good prestigious training in globally recognized creative skills that translate into a competitive edge in the market.

As a result of its accelerated growth, audiovisual production and distribution are constantly transforming. A recent survey commissioned for this publication shows that the lack of courses and training options at the level of quality demanded by the global industry and the fact that practical and curricular experience are out of sync were seen as some of the main challenges faced by the audiovisual production labor force in Latin America and the Caribbean.

The shared priority of AV industry players should be to address the lack of human capital and insist on the need to invest in training for new generations of young creators, especially for those who are socially vulnerable. We should use this opportunity to contribute to reactivating the regional economy through a growing Orange Economy.



Evidence shows that so-called 21st-century skills are crucial and will be essential in the forthcoming labor transition, in which millions of jobs will become automated. Critical thinking, learning how to learn, self-regulation and other soft skills such as empathy, perseverance and creativity will be indispensable in this scenario.

Likewise, developing a diverse talent pool will be key in enabling Latin America and the Caribbean to consolidate their position as an audiovisual powerhouse. The stories we tell and the way they are communicated portray our cultural wealth. It is vital to amplify voices and provide a creative platform to historically excluded groups such as women, First Nations, the Black community, people with disabilities and the socially marginalized. The audiovisual industry is an ideal channel to try out new narratives rooted in these voices. Their experience and talent both in front of and behind the camera are crucial to reach this goal. Since education is currently a significant gateway into the industry, it is essential to open training programs, scholarships, boot camps and artistic residencies designed to promote diversity.

Given its importance for the economy and employment, as well as its impact on our cultural identities, the audiovisual industry must become a priority. Public policy centered on this sector must be comprehensive and consider the various audiovisual formats: cinema, television series, short films, advertisements, video games and animation. It must also understand that these formats can transcend their own nature and bolster culture, tourism and country image.

It is an ideal time for the countries of Latin America and the Caribbean to benefit from the lessons provided by other audiovisual ecosystems and consolidate their own audiovisual industries. Transregional cooperation is as important as cooperation between governments, the private sector, professional associations and multilateral organizations. We hope this document is a first step in this direction.

FOREWORD

AUDIOVISUAL CONTENT: CAPITAL IN THE DIGITAL ECONOMY

It is the year 2030 and the Latin American economy has been improving for years. The COVID-19 pandemic is a sad and distant memory, and the GDP of the creative economy in the region has been steadily increasing throughout the decade. The Latin American and Caribbean region has consolidated as an emerging area in a sector that has demonstrated stable growth for the past 20 years: the entertainment and audiovisual content production industries.

As a result of bold political decisions and strategic partnerships, Latin America and the Caribbean have developed technical and creative professionals who became instrumental in the region's recovery from the worst socio-economic crisis in over a century. This has translated into greater investment, more robust business and innovative ecosystems, and more formal, high-quality and inclusive jobs. Our countries have capitalized on the opportunity to play a central role in creating and exporting audiovisual content, including cinema, television and series designed for digital channels. In this fu-

ture imaginary world scenario, animation studios in cities like Medellín or Montevideo will produce animated feature films and series for audiences in Canada and Russia. Screenwriters in Chile will write series that can move audiences in Istanbul and Paris. Brazilian productions, many of them directed by and starring Afro-Brazilians, will be all the rage in Nairobi and London. More young women will become producers and directors than ever before.

Not only will traditional jobs in the industry flourish, but also those requiring new 21st-century skills. It is not hard to imagine that new ventures will thrive in cities such as Puebla in Mexico and Mendoza in Argentina. The animation and visual effects (VFX) industries have turned these cities into hubs intertwining technology and art.

At the same time, countries such as the Dominican Republic, Uruguay and Paraguay will have consolidated their position as centers for high-quality production services. Films that would have been located in Eastern Europe will choose Montevideo instead, attracted by a professional workforce, high-quality infrastructure, and film-friendly audiovisual legislation. For years, the Dominican Republic has become the most obvious choice for crews wishing to shoot beach scenes, and the country has profited from this resource in order to develop an industry that offers world-class post-production services.



The economic landscape I have just described is not a work of fiction worthy of the big screen. For years, not only our region but the world as a whole has been increasingly consuming audiovisual content. Some estimates suggest that by 2026 there will be more than 100 million streaming subscribers in Latin America. Considering that the region's population is currently around 600 million, this figure is substantial.⁰¹

A boom in the demand for content, coupled with favorable public policy that includes national cinema laws and production incentives, has stimulated the industry throughout the continent. Historically important markets such as Mexico and Brazil are producing record-breaking volumes of audiovisual content. Other countries such as Colombia have seen the industry grow steadily. Countries that were not producing films only two decades ago are now launching productions that have become a source of pride and international acclaim. Throughout Latin America and the Caribbean, investment in infrastructure has generated employment and transformed the region into an area where films can be shot and produced. Once we overcome the pandemic and resume shooting, this activity will contribute to reactivating other sectors that have been severely affected by the pandemic, including the hospitality and tourism industries.

However, there is still much to be done if this industry is to play a more significant role in regional development. Investment and public policies aimed at transforming talent into the cornerstone of the audiovisual sector go hand in hand with what public policy experts, economists, creators and scholars have insisted upon in Latin America and the Caribbean for years—opting for industries nurtured by ideas, technology and creativity.

This is easier said than done. Our region has been exporting raw materials since the 15th century. As globalization expanded in the 20th century, Latin America increased its production of soybeans, gems, oil, minerals and natural gas. Our countries, however, are increasingly vulnerable to international price shocks. If the COVID-19 pandemic is added to the equation, it becomes clear that alternative ways forward will be needed to enable the development of more resilient economies and societies.

The cultural and creative industries are a resource that replenishes whenever creators experience a burst of inspiration and an impetus that hastens innovation. A new discussion about the value of these industries is already occurring in the region among producer organizations in Argentina, film and audiovisual institutes, national congresses, public and private universities, and development banks.

The increase in the demand and production of local content requires that entertainment and education/training join forces to lay the foundations of an industry that will become increasingly relevant in the coming decades. To this end, ecosystems will be of crucial importance for developing tools and supporting policies that promote talent and strengthen human capital. The IADB leads a coalition promoting 21st-century skills, which currently consists of more than 40 public and private sector partners, including Netflix. This coalition promotes a new generation of education and training policies to respond to current challenges: highly dynamic environments, a changing labor market and increasingly diverse societies.

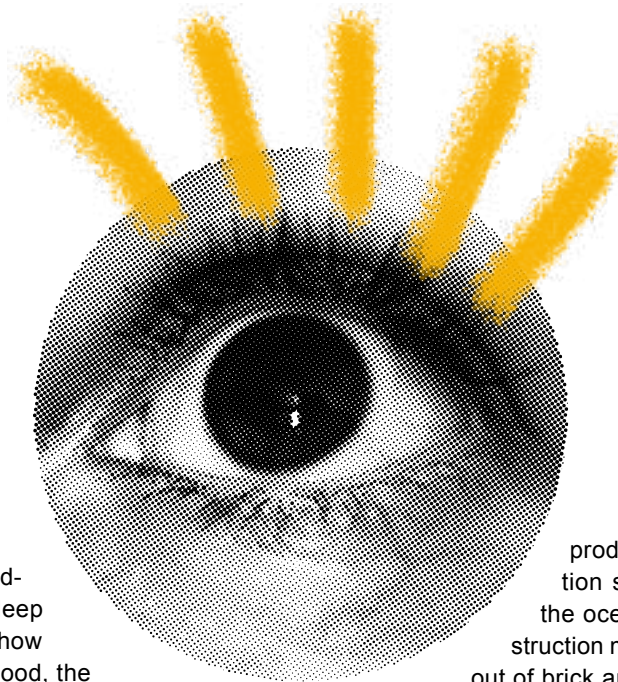
With the right kinds of public policies and a long-term vision, we will be able to anticipate the challenges that the sector will face and develop an industry that creates jobs and contributes to economic recovery. We will prepare the human capital that this budding industry requires in order to generate the creative outputs that are currently the digital economy's primary source of revenue. It is up to us to make our imagined future become a reality. It is up to us to build a more prosperous and creative region, where Latin American and Caribbean talent can shine.

MARCELO CABROL

— *Manager of the Social Sector,
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⁰¹ Digital TV Research, *Latin America OTT TV & Video Forecasts* (March 2021). https://www.digitaltvresearch.com/ugc/Latin%20America%20OTT%20TV%20and%20Video%20Forecasts%202021%20TOC_sample_313.pdf

LIGHTS, CAMERA, INTRODUCTION!



Everyone can name a Latin American movie, television broadcast or series that has made a deep impression on us: the comedy show that made us laugh in our childhood, the telenovelas we watched as a family or the acclaimed film that packed the movie theaters. It is hardly surprising: Latin America and the Caribbean have spent almost a century producing films and television content that have reached big, small and now even phone-sized screens all over the world.

Behind each of these productions, featuring just a handful of famous faces, is a powerful industry responsible for job creation and economic dynamism in cities like Buenos Aires, São Paulo, Mexico City and Caracas. We are, of course, referring to the audiovisual (AV) industry. When thinking of this industry, the first professions that would come to mind are those of the camera operators training their lenses from an overhead crane, the screenwriters who spend sleepless nights imagining stories or the cinematographers who transform ordinary city streets into an evocative landscape. However, any audiovisual

production also involves color correction specialists entrusted with making the ocean blue and the night black, construction managers in charge of building sets out of brick and wood, and even chefs catering breakfast buffets for the early rising technical team. In addition, there is the cost of the physical infrastructure—the industry invests significantly in sets and scenery as well as devoting countless hours to post-production in state-of-the-art studios. These titanic, creative and highly technical efforts often go unnoticed in the deceptive simplicity of a scene appearing on screen. But all it takes is a glance at the hundreds of credits rolling at the end of any movie to realize that every single film shoot entails hundreds, even thousands, of technically skilled, high-qualified jobs.

Despite the industry's association with red carpets and gala gowns, it is important to remember that glamour is only the most visible face of a sector that involves thousands of people who perform a vast range of tasks, and that the audiovisual and entertainment industry is synonymous with investment and development. The audiovisual industry's economic engine distributes approximately \$177 billion USD in investments every year.⁰² In Latin America, it is estimated that some \$5.7 billion USD were invested in audiovisual productions in 2019, resulting in over 1.6 million direct and indirect jobs.⁰³ The industry employed more people than the current population of Montevideo, Uruguay. Despite this massive economic impact, most governments in the region have yet to harness the full

02 Olsberg SPI, *Global Screen Production- The Impact of Film and Television Production on Economic Recovery from COVID-19* (June 25, 2020), 5. <https://www.o-spi.co.uk/wp-content/uploads/2020/06/Global-Screen-Production-and-COVID-19-Economic-Recovery-Final-2020-06-25.pdf>

03 Olsberg SPI, *Global Screen Production*, 13, 15.

IN LATIN AMERICA, IT IS ESTIMATED THAT SOME \$5.7 BILLION USD WERE INVESTED IN AUDIOVISUAL PRODUCTIONS IN 2019, RESULTING IN OVER 1.6 MILLION DIRECT AND INDIRECT JOBS



potential offered by this sector—a goal that could be achieved through appropriate public policies to stimulate the industry. As in other areas of the creative economy, the pandemic considerably affected the global and regional entertainment industries. For instance, the lockdowns caused by the COVID-19 pandemic led to the loss of more than 10 million full-time equivalent jobs in the audiovisual value chain.⁰⁴ In 2020, after a multi-year increase in ticket sales and domestic film releases, difficult moments ensued. Movie theaters in Latin America and the Caribbean play a crucial role in a community's social and economic fabric, which has meant years of rapid growth for the industry. In 2019, there was an average of 21 movie screens per million inhabitants.⁰⁵ According to Mexico's National Chamber of the Cinema Industry (Canacine),⁰⁶ losses incurred as a result of the pandemic in countries such as Mexico (which has the highest concentration of cinemas in the region) were estimated at 18.4 billion pesos between March 2020 and February 2021. The same was true for film shoots around the world, which were forced to suspend work. This affected thousands of jobs and incurred losses for production companies.⁰⁷ However, throughout the crisis, audiovisual production has been resilient. This industry was among the first to adapt to the reality of a new virus and incorporate health measures aimed at curbing contagion and resuming film shoots. The sector also demonstrated acts of great social solidarity—during the first months of the global lockdown of 2020, many creators and entertainment companies shared their content free-of-charge, which made staying at home more bearable. As a result, whether they sought entertainment in films, telenovelas, series, television or online videos, millions of Latin Americans eased the psychological burden of staying at home thanks to the support of the audiovisual sector. Likewise, many companies sprang into action and created funds to support the workers most affected by the film industry's shutdown.⁰⁸

Beyond these important contributions to society, some experts suggest that the audiovisual and entertainment industry will play a decisive role in post-pandemic economic recovery. A study by the Inter-American Development Bank concerning the pandemic's impact on the cultural sector has highlighted that value chain disruptions, the low priority assigned to culture in recovery efforts, and budget cuts are some of the most pressing issues faced by the Orange Economy in the current health and economic crisis.⁰⁹

Given these difficulties, the production of films and series, which generally entails the execution of major budgets in short time periods, can play an important role in reactivating short-term economic recovery. This is also due to the fact that, on average, 67% of production expenditures have an indirect impact on other economic sectors.¹⁰

67%

of production expenses indirectly impacts other sectors.



04 Olsberg SPI, *Global Screen Production*, 2.

05 Oscar Berrendo, Juan Antonio Serrano and Enrique Encinas. *Panorama Audiovisual Iberoamericano 2019* (Madrid: EGEDA, 2019), 41. <https://www.egeda.com/documentos/PanoramaAudiovisualIberoamericano2019/Panorama%20Audiovisual%20Iberoamericano%202019.pdf>

06 Alejandra Rodríguez, "El impacto de la pandemia a cines en México: 334 millones de boletos no vendidos en 11 meses," *El Financiero* (February 9, 2021). <https://www.elfinanciero.com.mx/empresas/el-impacto-de-la-pandemia-a-cines-en-mexico-334-millones-de-boletos-no-vendidos-en-11-meses/>

07 Mario Carbonell, "La doble crisis de la industria cinematográfica en México (5/5)," *France 24* (September 4, 2020). <https://www.france24.com/es/20200904-m%C3%A9xico-criisis-industria-cine-pandemia>

08 Milenio, "Netflix y AMACC dan fondo de apoyo a mil 437 trabajadores de industria cinematográfica" (July 15, 2020). <https://www.milenio.com/espectaculos/cine/netflix-amacc-fondo-1-437-trabajadores-industria-cine>

09 Banco Interamericano de Desarrollo [BID], *La pandemia pone a prueba a la economía creativa. Ideas y recomendaciones de una red de expertos* (2020), 5. <https://publications.iadb.org/publications/spanish/document/La-pandemia-pone-a-prueba-a-la-economia-creativa-Ideas-y-recomendaciones-de-una-red-de-expertos.pdf>

10 Olsberg SPI, *Global Screen Production*, 6-7.

PROPORTION OF PRODUCTION SPEND IN OTHER BUSINESS SECTORS BY PROJECT TYPE¹¹

| | Major Film (\$220m USD) | Mid-Budget Film (\$20m USD) | Low-Budget Film (\$6m USD) | High-End TV Series (\$70m USD) | Mid-Budget TV Series (\$13m USD) | Average |
|----------------------------|----------------------------|--------------------------------|-------------------------------|-----------------------------------|--|---------|
| SECTOR | % | % | % | % | % | % |
| Screen Production Specific | 42,5 | 30,2 | 32,1 | 37,3 | 23,3 | 33,1 |
| Business Support | 11,4 | 15,0 | 5,8 | 11,9 | 15,9 | 12,2 |
| Construction | 14,6 | 5,5 | 2,6 | 24,6 | 8,5 | 11,2 |
| VFX & Interactive | 12,5 | 6,4 | 1,8 | 8,1 | 4,5 | 6,7 |
| Travel & Transport | 4,3 | 8,3 | 16,8 | 1,3 | 9,8 | 8,1 |
| Hospitality & Catering | 2,3 | 3,6 | 10,6 | 3,6 | 12,8 | 6,6 |
| Finance & Legal | 1,5 | 6,8 | 11,5 | 1,3 | 6,7 | 5,6 |
| Real Estate | 1,6 | 9,7 | 7,6 | 2,2 | 6,4 | 5,5 |
| Fashion & Beauty | 4,6 | 2,2 | 7,6 | 5,4 | 5,8 | 5,1 |
| Music & Performing Arts | 2,7 | 6,4 | 2,2 | 2,8 | 3,4 | 3,5 |
| Electrical Services | 1,1 | 1,0 | 0,3 | 1,0 | 0,4 | 0,8 |
| Safety & Security | 0,5 | 1,2 | 0,2 | 0,2 | 1,4 | 0,7 |
| Education | 0,1 | 1,2 | 0,7 | 0,1 | 0,8 | 0,6 |
| Health & Medical | 0,3 | 1,5 | 0,2 | 0,2 | 0,3 | 0,5 |
| | 100 | 100 | 100 | 100 | 100 | 100 |

¹¹ Olsberg SPI, *Global Screen Production*, 8.

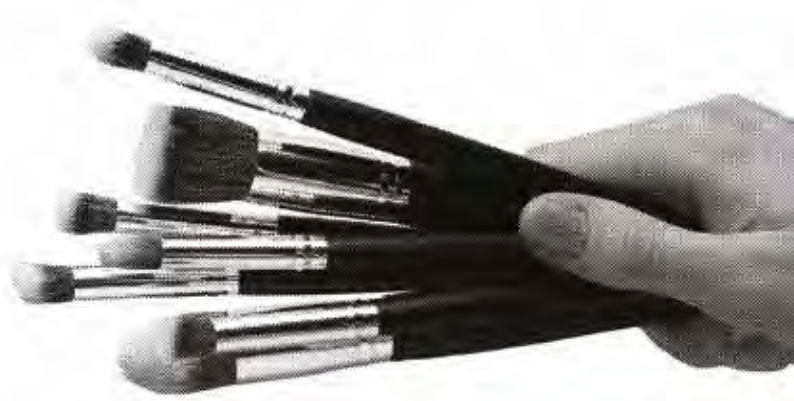
The audiovisual sector presents additional reasons for optimism. The recent boom of subscription video on demand services (SVOD), colloquially called streaming services, has consolidated Latin America and the Caribbean as a market that demands high-quality local content in all genres. Through global and regional streaming services such as Amazon Prime Video, Disney+, Netflix, Globo Play, Movistar+, Claro Video, HBO Max and Blim, among others, major corporate players are investing heavily in producing original content destined for the Latin American market. This has translated into new sources of investment.

Since demand for audiovisual content has not decreased despite the pandemic, investments by streaming services in the region are not expected to diminish.

The arrival of the streaming model in the region a decade ago has underlined two key trends in Latin America's audiovisual history. It underscores the region's strong affinity for local content and demonstrates its potential as an audiovisual exporter that takes relevant stories to diverse places. This should come as no surprise—the wellspring of Latin America and the Caribbean's creativity is directly drawn from a vast cultural and social richness that appeals to audiences worldwide. The recent boom of the audiovisual industry is proof that, in Latin America and the Caribbean, it is possible to find good stories, artistic talent, film locations and a creative lens that has seduced the world many times over through films, telenovelas, series, comedies, animations, and more.

Despite this, the region faces some drawbacks and harsh realities that cannot be ignored, including nascent educational programs as well as a demand for services that often outpaces the availability of technical and creative talent. Even though some countries have developed legal frameworks through film laws, as well as state and national programs designed to accelerate growth in this sector, many others are still in a position where they struggle to compete with more established audiovisual centers around the world that offer talent, infrastructure and direct incentives.

Opportunities, however, are ripe for the taking. According to the study commissioned for this publication, most audiovisual producers in Latin America and the Caribbean believe that demand for technical jobs related to audiovisual production will increase over the next few years. These jobs include those associated with special effects, visual effects, greenery and stunt work. Other talent-related jobs, including those of screenwriters and makeup artists, can benefit from upskilling. Many of the insiders and experts interviewed for this publication agreed on the urgent need to reinforce training efforts, strengthen public-private partnerships and equip Latin American talent with the appropriate knowledge and technologies to carry out new jobs that the industry will demand in the near future. Some experts have warned that their countries are already experiencing bottlenecks when it comes to finding audiovisual talent. For this reason, training and skill-honing must be prioritized in the region. Achieving this objective requires a concerted effort at the level of the government, the private sector, professional associations, and multilateral organizations.



Our numerous conversations with producers, executives, government officials, screenwriters, specialists and other experts enabled us to focus our lens on understanding the needs behind the scenes. We are confident that these conversations signal a need to implement specific public policies and can therefore serve as a path to create policy recommendations geared toward this strategic sector.

By combining research, interviews and storytelling, our aim is to share experiences that help promote the talent and stories of Latin America and the Caribbean as well as the unique opportunities offered by the present moment.



**AND SO:
LIGHTS,
CAMERA,
ACTION!**

RECENT ANNOUNCEMENTS OF INVESTMENT IN LOCAL CONTENT PRODUCTION

AMAZON PRIME VIDEO

"Amazon Prime Video has a range of local original titles from across Mexico, Brazil, Argentina, Colombia, and Chile in varying stages of production that will premiere over the next 2-3 years. In Mexico alone, we recently announced a plan to greenlight between 10-15 new original series and 4-5 new original movies each year over the next 3 to 5 years."¹²

2021 will see the release of the second season of *De viaje con los Derbez*, *Pan y Circo* and *El juego de las llaves*, as well as the third and fourth seasons of *LOL: Last One Laughing*. Other announcements include a biographical series on the life of Diego Maradona (*Maradona: sueño bendito*) and a documentary about the Chivas de Guadalajara soccer club. *Soldados o zombies*, the first Mexican horror series, is also set for release.

Announcements for the Brazilian market include the drama series *Sentença*, together with the comedies *Desjuntados* and *5X Comedy*, an adaptation of a theater production.

Amazon also announced a \$2.65 million USD recovery fund supporting the recovery efforts of television, cinema and theater companies in Mexico and throughout Latin America.¹³

DISNEY+

On November 17, 2020, the Walt Disney Company launched its streaming platform Disney+ in Latin America. Soon after, Diego Lerner, president of the Walt Disney Company Latin America, announced that it had 71 productions in different stages of development in Latin America, including "15 in Brazil, 21 in Mexico, 29 in Argentina and 6 in Colombia." These include "fiction, interview shows, documentaries [and] live shows."¹⁴

A few of the Latin American creators set to participate in these productions include Jay de la Cueva, Fito Páez, Adal Ramones, Fabio Porchat and Omar Chaparro.

Disney also announced it would launch the platform Star in Latin America on August 31, 2021. Geared towards a more adult audience, Star will serve as a complement to Disney+, although Lerner has assured that it can "carry its own weight as a digital service independent from Disney." *Santa Evita*, *No fue mi culpa*, *El galán* and *Los protectores* are some of the titles the company is developing entirely in Latin America that will soon premiere.¹⁵

GLOBOPLAY

In November 2020, the Brazilian media conglomerate Globo announced its plans to invest \$250 million USD in content and technology and confirmed that it is currently producing and developing 82 original shows.¹⁶

¹² Amazon, personal communication (February 26, 2021).

¹³ Infobae, "Amazon donará más de USD 2.65 millones a productoras de América Latina por covid-19" (January 26, 2021). <https://www.infobae.com/america/agencias/2021/01/27/amazon-donara-mas-de-usd-265-millones-a-productoras-de-america-latina-por-covid-19/>

¹⁴ Disney, "Disney+ presenta su sólida oferta de contenido original, íntegramente producido en Latinoamérica" (November 30, 2020). <https://www.disneylapresspack.com/disney-plus/post/5453>

¹⁵ Disney, "No Star+, cada consumidor encontrará exactamente o que quer ver" (May 14, 2021). <https://www.disneylapresspack.com/star-plus/post/7884>

¹⁶ Tom Grater, "How Brazilian TV Giant Globo Is Planning To Compete With Netflix & Amazon In The Streaming War," *Deadline* (January 19, 2021). <https://deadline.com/2021/01/how-brazilian-tv-giant-globo-is-planning-to-compete-with-netflix-amazon-in-the-streaming-war-1234676055/>

RECENT ANNOUNCEMENTS OF INVESTMENT IN LOCAL CONTENT PRODUCTION

NETFLIX

Mexico According to a January 2021 report by *Forbes*, Netflix has announced more than 50 original productions and will be investing \$300 million USD in 2021.¹⁷ Some of the titles announced include *Río Grande*, *Río Bravo* (a five-episode documentary series produced by Gael García Bernal, Elena Fortes and Daniela Alatorre) and feature films such as *Fondeados* (directed by the screenwriter and producer Marcos Bucay of *Club de cuervos*) and series such as *Los corruptores*, based on the novel by Jorge Zepeda Patterson, and the young adult series, *Sofía H.*, produced by Lemon Films.

Brazil In 2021-2022, Netflix will release *De Volta aos 15*, *Temporada de Verão*, and *Maldivas*. It will also release the second seasons of *Cidade Invisível*, *Bom Dia, Verônica*, *Hermandad*, as well as local adaptations of the reality shows *Too Hot to Handle* and *Love is Blind*.

After the success of the films *Pai em Dobro* and *Modo Avião*, viewed in 28 million households worldwide, Netflix is set to expand its offer of original Brazilian feature films. A few of the announced projects include *Carnaval*, *Confissões de Uma Garota Excluída* and *Lulli*, as well as the comedies *Vizinhos* and *Casamento a Distância* and the first Brazilian original action film, *Carga Máxima*.

Colombia More than 30 projects produced in Colombia are set for release between 2021 and 2022. A few of these include *Ritmo salvaje*, *Juanpis*, *Nada es igual*, *Goles en contra*, *Pálpito*, *Perfil falso*, *Diomedes* and a series starring Alejandra Azcárate.

Argentina In February 2021, Netflix confirmed the production of new series and films in Argentina. These include a second season of *Casi feliz* (starring Sebastián Wainraich and Natalie Pérez), *El amor después del amor* (a fiction series based on the life of musician Fito Páez), and seasons 4 and 5 of *El marginal*, *Cielo grande* (starring Pilar Pascual, Abril Di Yorio, among others), *El eternauta* (based on a popular science fiction graphic novel) and *El reino* (a thriller starring Mercedes Morán and Diego Peretti, set for release during the winter of 2021). Other movies to premiere include *Granizo* (a comedy starring Guillermo Francella) and *Pipa* (with Luisana Lopilato as leading actress).

Chile *42 días en la oscuridad* is the first Netflix original feature made for the Chilean market. It will be co-directed by Claudia Huaiquimilla and Gaspar Antillo. Produced by Fabula (the production house founded by the brothers Juan de Dios and Pablo Larraín), the series will center on the disappearance of a woman and her sister's desperate race against time to locate her.

Peru The first Netflix original feature film made in Peru will be directed by Bruno Ascenzo and produced by Tondero. The main cast includes Stephanie Cayo and the Spanish actor Maxi Iglesias. 2021 will also see the release of *Distancia de rescate*, directed by the acclaimed Claudia Llosa, based on a novel by the Argentinian fiction writer Samanta Schweblin, who co-authored the script with Llosa.

17 Mauricio Hernández and Roberto Aguilar, "Netflix invertirá más de 300 millones de dólares en México para 2021," *Forbes México* (January 25, 2021). <https://www.forbes.com.mx/exclusiva-netflix-invertira-mas-de-300-millones-de-dolares-en-mexico-para-2021/>

RECENT ANNOUNCEMENTS OF INVESTMENT IN LOCAL CONTENT PRODUCTION

HBO MAX

In late April of 2021, HBO Max, owned by WarnerMedia, announced its plans to develop over 100 local productions in Latin America during the next two years, 33 of which are already being produced.¹⁸

In February 2021, WarnerMedia announced that *Días de gallos* and *Bunker* would be its first Latin American productions made for the HBO Max streaming platform.¹⁹ Other titles include *Amarres* (Mexico) and *Bilardo, El doctor del fútbol*, a sports documentary set in Argentina.

In 2021, HBO will also premiere the series *Entre hombres* (Argentina), *El huésped americano* (an international series with a Brazilian cast), *Hard* (season two, Brazil) and *Ámsterdam*, shot in Mexico and Uruguay. Season 3 of *El jardín de bronce*, together with the release of *Área de Serviço* and the documentary series *Tu casa es mi casa* will complete the company's roster.²⁰

APPLETV+

AppleTV+ will develop a project entitled *Acapulco* together with the Mexican comedian Eugenio Derbez. Other Latin American creators working with AppleTV+ include Fede Álvarez, who directs the miniseries *Calls*, and Pablo Larraín, who will be directing *Lisey's Story*, based on the novel by Stephen King. The Mexican director Alfonso Cuarón has signed an exclusivity agreement with the company.²¹

AppleTV has previously shot in Latin America: The English-language series *The Mosquito Coast*, based on the novel by Paul Theroux, was filmed in Jalisco, Mexico, in 2020.

MOVISTAR+

In 2020, Movistar+ announced that it was producing 15 programs, 10 of them new, and five of which are new seasons of existing productions, such as *SKAM España*. *Dime quién soy*, based on the novel by Julia Navarro, is a historical super-production. The series *Antidisturbios* centers on a team of riot police. Another recent production is *Nasdrovia*, a miniseries comedy starring Leonor Watling and Hugo Silva.²²

18 WarnerMedia, "HBO Max Arrives in Full Force in Latin America With More Than 100 Local Original Productions Over the Next Two Years" (April 29, 2021). <https://pressroom.warnermedia.com/us/media-release/hbo-max/hbo-max-arrives-full-force-latin-america-more-100-local-original-productions-over>

19 John Hopewell, "WarnerMedia Latin America Unveils Its First Original Series for HBO Max, 'Días de Gallos' and 'Bunker'," *Variety* (February 13, 2021). <https://variety.com/2021/streaming/global/warnermedia-latin-america-hbo-max-dias-de-gallos-bunker-1234907699/>

20 Forbes, "HBO anuncia todo el contenido original que llegará este 2021" (February 15, 2021). <https://www.forbes.com.mx/forbes-life/entretenimiento-hbo-estrenos-contenido-original-2021/>

21 El País, "Alfonso Cuarón ficha por Apple TV para crear series" (October 11, 2019). https://elpais.com/cultura/2019/10/11/television/1570791964_497938.html

22 Álvaro Onieva, "Las próximas series originales de Movistar+ para otoño de 2020 y 2021," *Fuera de series* (August 3, 2020). <https://fueraadeseries.com/las-proximas-series-originales-de-movistar-para-otono-de-2020-y-2021-922067aff2fc/>

RECENT ANNOUNCEMENTS OF INVESTMENT IN LOCAL CONTENT PRODUCTION

CLARO VIDEO

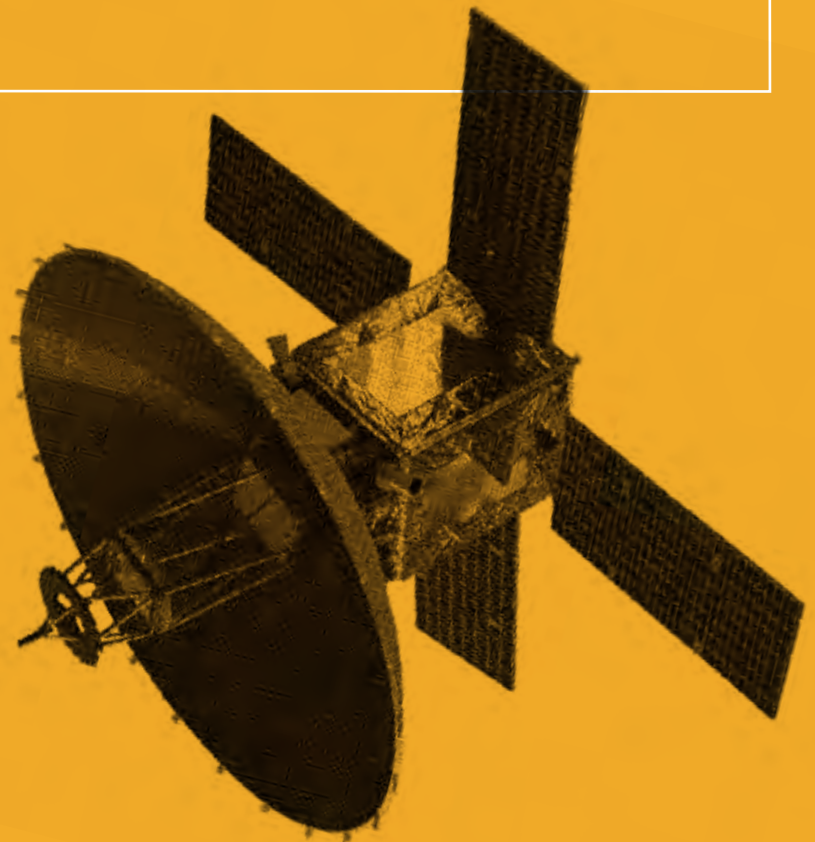
In February 2021, Claro premiered *La negociadora*, an original series with Bárbara Mori in the leading role, co-produced by 11:11 Films TV. Claro Video also broadcasted the 2020 Tokyo Olympics.²³

PARAMOUNT+

Directed by Juan José Campanella (Argentina), *Los enviados* is the first Spanish-language series by Viacom CBS for Paramount+. The main cast will include Luis Gerardo Méndez, Irene Azuela and Ángel Silvestre.²⁴

TELEVISA-UNIVISION

In April 2021, media conglomerates Televisa and Univision announced a merger aimed at positioning themselves in the streaming market through a platform that is set to be launched in early 2022.²⁵



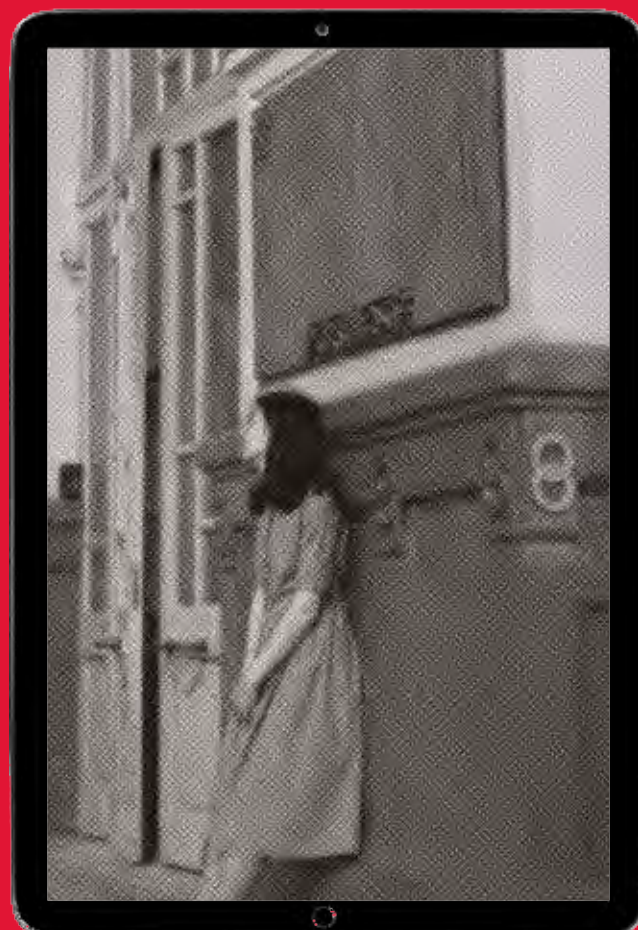
²³ El CEO, "Netflix, Claro Video y Amazon Prime apuestan por series para lidiar con nuevos rivales" (January 27, 2021). <https://elceo.com/negocios/netflix-claro-video-y-amazon-prime-apuestan-por-series-para-lidiar-con-nuevos-rivales/>

²⁴ El Horizonte, "Luis Gerardo Méndez a la cabeza de la nueva serie de Paramount Plus" (April 13, 2021). <https://d.elhorizonte.mx/escena/luis-gerardo-mendez-cabeza-nueva-serie-paramount-plus/3033584>

²⁵ El País, "Televisa y Univisión se fusionan para competir contra las plataformas de 'streaming'" (April 14, 2021). <https://elpais.com/mexico/2021-04-14/televisa-y-univision-se-fusionan-para-competir-contra-las-plataformas-de-streaming.html>

PART I

LEGACY MODELS AND NEW PATHS FORWARD IN THE AUDIOVISUAL SECTOR: **FROM INDUSTRY DIGITALIZATION TO THE RISE OF STREAMING**



HISTORICAL BACKGROUND: AN AUDIOVISUAL CENTURY

The history of the audiovisual industry in Latin America spans more than a century. Its origins can be traced to the Lumière brothers traveling to Mexico to promote their latest invention: the Cinematographe. They were succeeded by other European travelers who traversed the region with a camera in hand, filming heads of state on horseback and locals in the marketplace. Some might argue that this was the birth of Latin America as a film location.

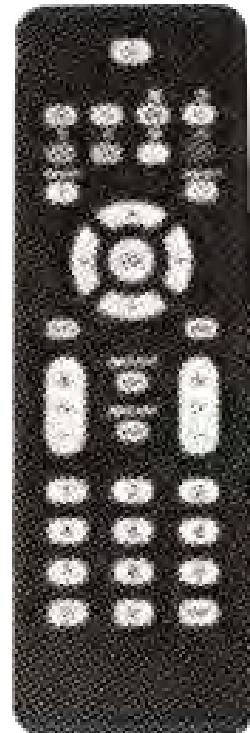
However, Latin Americans were already demonstrating a desire to be more than mere figures in a backdrop and soon began shooting their own films. Starting in 1918 with the outbreak of World War I, cinema in Latin America enjoyed its first moment of splendor. France, Germany and Italy, the leading film exporting countries at the time, were too busy on the battlefield to pay attention to their film industries. This situation bolstered the budding industry in Hollywood but also in Mexico City and Buenos Aires. The founding of the Fox Film Corporation (1915) in the United States took place more or less at the same time as that of Azteca Films (1917), the first film studio established in Mexico. In Buenos Aires, Cairo Films released *Nobleza gaucha* (1915), a silent feature film that became the first box-office success in the history of Latin American cinema.²⁶

Technical accomplishments were the hallmarks of new eras and created opportunities. The development of sound film in the 1930s revolutionized the industry and led to a second wave of film investment and distribution. It soon became evident that cinema was a powerful tool of representation. In Mexico, the Russian director Sergei Eisenstein filmed the villagers wearing leather sandals and sombreros that for decades identified Mexico around the world. *Las luces de Buenos Aires* (1931), the pioneering sound film that launched Carlos Gardel into stardom, did the same for the city of Buenos Aires, which became associated with the rhythms of tango presented in the film (which was actually shot in Paris). On the other hand, the Californian movie industry turned the border city of Tijuana, Mexico, not only into a location but also a protagonist for numerous films. Between 1924 and 1935, a total of 20 Hollywood films chose Tijuana as a location or topic.²⁷ The same occurred with Rio de Janeiro, which served as a backdrop for the 1933 feature *Flying Down to Rio*, starring the Mexican diva Dolores del Río and the Omaha-born Fred Astaire. The film created an archetype of Rio de Janeiro as an elegant and mystical city (this was done with aid from the Brazilian government and its Commission for International Cooperation, which saw cinema as a space to shape a positive image of Brazil on the international stage).²⁸ Eighty years after the film's release, tourists still pass through the grand hotels of Copacabana in search of the ghosts of the *cidade maravilhosa* that they first saw on the big screen decades before.

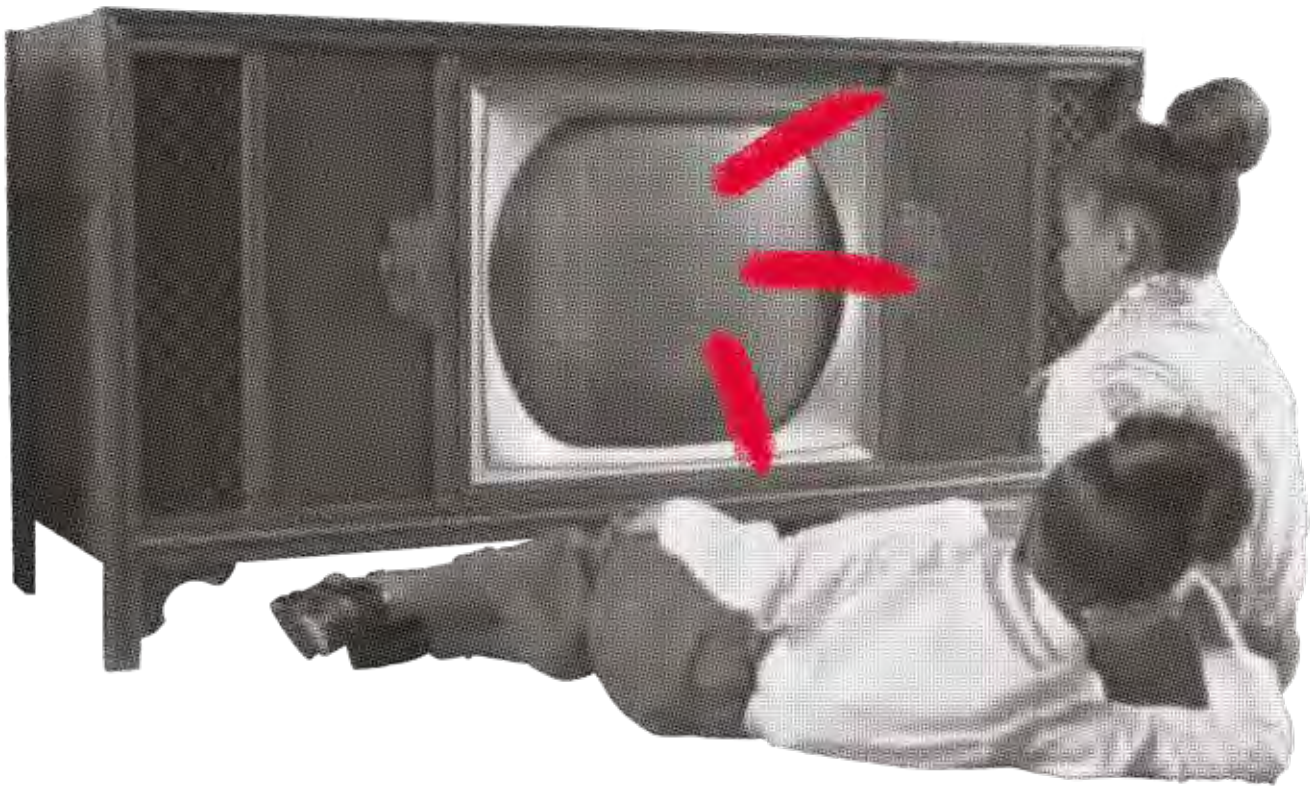
The first boom of Latin American cinema, particularly in Mexico and Argentina, would come soon after due to the negative impact of the Great Depression of 1929 and the Second World War. With Hollywood out of cash, Argentina increased its production of sound films starting in the 1930s.²⁹ In 1942, Argentina produced 56 films, the highest number of films in the Spanish-speaking world that year; this production was widely distributed throughout the

southern countries of South America. Argentina's years as a filmmaking powerhouse are often referred to as its Golden Age of cinema. These were the decades of stars such as Tita Merello, Zully Moreno and Libertad Lamarque.

In the 1940s, Mexico increased its film production and began exporting to what some have called its "natural market"—Central America, northern South America and the southern United States. This growth was due, in part, to the 1945 inauguration of Estudios Churubusco (Churubusco Film Studio), which was the most technically advanced film studio in Latin America at the time. In 1950, out of 124 films premiered in Mexico, a whopping 36 were produced in this studio. This proportion would increase in the coming years,³⁰ providing compelling evidence for the importance of investing in infrastructure. As a result of its increasing global presence and its large production volumes and star system, Mexico also experienced its own golden age.



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- 26 Laura Tucker, "Páginas libres: Inclusion and Representation in Early Argentine Cinematic Practices," *Revista de Estudios Hispánicos*, 49 (2015), 131.
 - 27 Tim Girven, "Hollywood's heterotopia: US cinema, the Mexican border and the making of Tijuana," *Travesía, Journal of Latin American Cultural Studies*, 3 (1994), 119-120.
 - 28 João Mascarenhas, "La construcción de la imagen de Río de Janeiro en Hollywood durante los años treinta y cuarenta," *Procesos Históricos, Revista de Historia, Arte y Ciencias Sociales*, 31 (2018), 131.
 - 29 Nadia Ponti, "La evolución del espacio escénico en la época dorada del cine argentino (1933-1943)," *Escena Uno | Escenografía, dirección de arte y puesta en escena*, 7 (2017), 1. <http://escenauno.org/wp-content/uploads/2017/12/La-evolucion%C3%B3n-del-espacio-escenico-en-la-epoca-dorada-del-cine-argentino.pdf>
 - 30 Isaac León Frías, *Más allá de las lágrimas: espacios habitables en el cine clásico de México y Argentina* (Lima: Universidad de Lima, 2018), Scribd edition, chapter II, section 13.



In the following decades, comedies, melodramas and musicals would become the most important genres of Latin American cinema, marked by the rise of figures such as Mario Moreno, better known as “Cantinflas,” or Pedro Infante, whose fame crossed borders and made them idols in places as unexpected as the Peruvian Andes, the Chilean Patagonia or the villages of Andalusia. Mexico saw its audiovisual exports reach unlikely audiences. *Ranchero* films, for instance, gained mass appeal in General Tito’s Yugoslavia. And although this country today no longer exists, many Serbians and Croatians still profess a great fondness for *mariachi* music, which demonstrates the longstanding cultural influence of audiovisual content on the social imaginary.

THE RISE OF THE SMALL SCREEN

In the 1960s, cinema began to face new competition: television. This technology, which emerged in the 1930s but only gained mass distribution and a color signal in Latin America during the 1960s, became an essential part of households throughout the region. At the same time, Latin America saw the rise of a new industry led by companies such as Telesistema Mexicano (which later became Televisa), TVGlobo in Brazil, Caracol Televisión in Colombia and Venevisión in Venezuela, among others. These companies began producing and broadcasting content specifically made for television—a device that would become the king of domestic appliances and the sole screen of the household for decades.

For the most part, television programs were recorded live: news programs, political speeches, sports, and variety shows with live music and dancing. However, television soon adapted formats that had earlier been the domain of cinema and radio—melodramatic radio serials were combined with cinema’s visual narrative to integrate new forms of storytelling. Latin America was the birthplace of what the scholar Eduardo Santa Cruz has called “Latin America’s most important cultural product”—the telenovela.

Television experienced a boom in the 1970s and 1980s, and the film industry found it difficult to compete. Most countries in Latin America faced severe economic and political crises that affected consumer purchasing power, in turn hurting national film production, which dropped together with the quality of content.³¹ State funding was slashed, and the overall number of films produced, especially in Mexico and Brazil, fell dramatically. As a result of economic liberalization and the rise of free trade agreements, U.S. films increased their share of the market. The same occurred with content from other foreign regions, including Japan, whose animated series (known as *anime*) were broadcast widely during the 1990s on Latin American television.

31 Isis Saavedra, “El fin de la industria cinematográfica mexicana 1989-1994,” *EIAL: Estudios Interdisciplinarios de América Latina y el Caribe*, 17 (2006), 111.

However, the region continued to produce audiovisual content, primarily for television, through media conglomerates, such as Televisa, Caracol TV, Globo, TV Azteca and Venevisión. In the 1990s, Brazilian, Colombian and Venezuelan telenovelas reached audiences throughout the Americas as well as Europe, Asia and Africa, with the ensuing economic gain that exports bring. The rise of cable and satellite television also increased demand for audiovisual content³² and created jobs for directors, screenwriters, producers and crews. In the early 21st century, the pay-TV segment, with nearly 15 million subscribers in Latin America, fueled demand for domestic and imported content for markets such as Brazil, Argentina, Mexico and Venezuela. Throughout those years, the skylines of cities like São Paulo, Monterrey and Caracas were dotted with ubiquitous satellite dishes. Corporations like Omnivisión Multicanal (Venezuela), Cablevisión (Mexico), PCTV (Mexico) and Net (Brazil) were some of the biggest players in the sector. Through these services, U.S. channels such as Cartoon Network, MTV, Fox, CNN and Discovery Channel, among others, created Latin American offshoots of their channels, offering locally produced content from across the region as well as content originating in the United States headquarters.

Despite this situation and the rise of television as a format, the drive to create films did not decline. In the late 1990s, a wave of directors in Mexico and Brazil, including Alfonso Cuarón, Walter Salles, Fernando Meirelles and Alejandro González Iñárritu, experimented with new forms of financing, including private investment and international co-production. This gave rise to some of the most iconic films of the new century, including *Amores perros* (2000), *Central do Brasil* (1998), *Y tu mamá también* (2001) and *City of God* (2002).

With the turn of the century, the rise of state funding meant a new stream of financing for regional cinema industries. The growth in the number of movie theaters and the rise of cable television increased distribution, which bolstered production ecosystems. An interesting example is HBO Olé, launched in 1991 by Omnivisión Multicanal in Venezuela. HBO Olé introduced premium television series to Latin American consumers. In the 1990s, HBO US had experimented with producing original drama series, including *Oz* (1997) and *The Sopranos* (1999). Both series, extending over several seasons, served as models for HBO productions in Latin America including *Epitafios* (Argentina, 2004), *Mandrake* (Brazil, 2005), *Capadocia* (Mexico, 2008) and *Prófugos* (Chile, 2011).

STREAMING MAKES AN ENTRANCE

Sometime between 1989 (Mexico) and 1994 (Colombia), most Latin American countries connected to the Internet for the first time. In the following years, this technology went from being available only to university researchers and government officials to becoming somewhat common in urban households. Initially, internet speeds allowed for the transmission of small files (mostly text). The onset of broadband internet, which became increasingly common throughout the early 21st century, improved connection speeds dramatically.³³ These high-speed connections made it possible to share ever-larger files (for instance, video) via the web. As the internet grew, a new electronic device became more and more prominent in the home—the desktop computer. The desktop would soon morph into new shapes, including portable computers, smartphones and, later on, electronic tablets. All of these would become potential devices from which to consume audiovisual content.

On April 24, 2005, a user going by the name Jawed uploaded a clip to a new website called YouTube. The clip, barely 19 seconds long, shows a man in his twenties—Jawed Karim, one of the website's founders—speaking in front of an elephant enclosure in a zoo. This was the first video in the platform's history.

YouTube started as a service where anyone could share or watch videos. The platform appeared at a crucial moment—one in which the rise of digital cameras and faster download speeds meant people could easily disseminate videos online. Less than one month after launching, the service was receiving nearly 30,000 daily visits from all over the world. By December 2005, the number had reached 25 million daily visits.³⁴

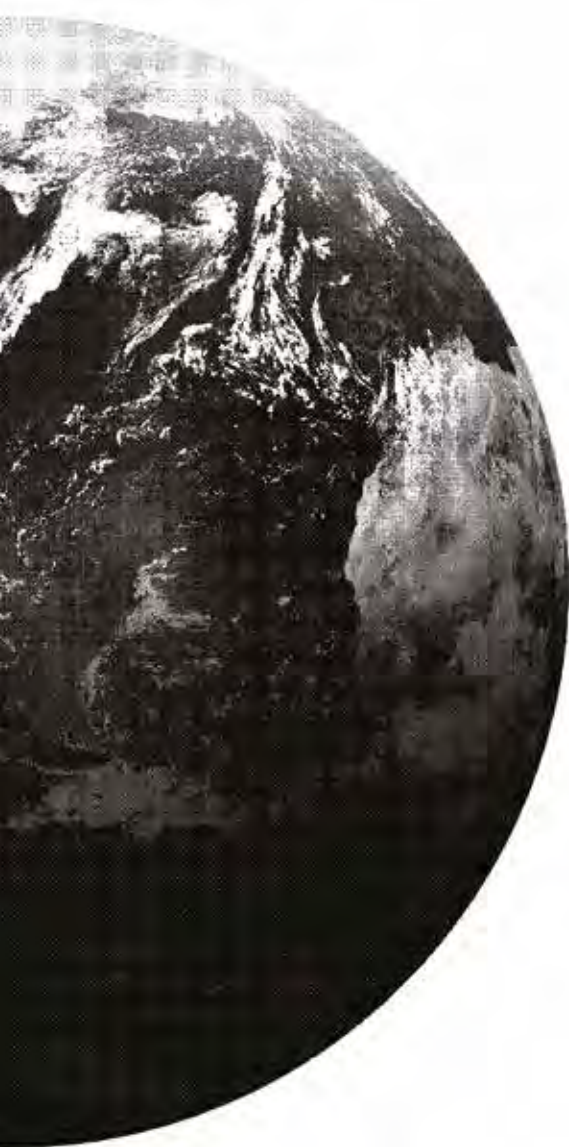
Although it was not the first service to allow online sharing of videos (Vimeo, a similar service, was founded in 2004), YouTube would be the first to offer the service—what we now call streaming—to a mass audience. Despite facing significant challenges in its first year, mostly related to meeting extraordinary user demand and curbing copyright infringement, the rapid growth in users proved there was an enormous online interest in series, films, music videos and other audiovisual content (including user-generated videos). In November 2006, barely a year and a half after launching, YouTube was purchased by Google for \$1.6 billion USD. The service has continued to grow since, and the technology it popularized—streaming—has become a common vehicle for all sorts of content.

32 Delia Crovi, "La televisión por cable en México," *Revista Telos* 69 (n.d.), 9. <https://telos.fundaciontelefonica.com/archivo/numero069/la-television-por-cable-en-mexico/?output=pdf>

33 Yevgeny Kuznetsov and Carl Dahlman, *Mexico's Transition to a Knowledge-Based Economy. Challenge and Opportunities* (Washington: World Bank Institute, Development Studies, 2008), 92.

34 William Hosch, "YouTube," *Encyclopedia Britannica*; <https://www.britannica.com/topic/YouTube>.

At the turn of the century, Netflix's business model was mostly based on DVD rentals by mail. Beginning in 2007, however, the company pivoted away from this service and became an entertainment company charging subscribers for access to a digital streaming platform. **Contrary to the box office that measures success by the number of tickets sold or the rating-based metrics of television, success for subscription video-on-demand companies is measured by the number of subscribers that sign up for the service, who in turn pay a monthly subscription fee.** In its early years, the Netflix catalogue was composed entirely of content leased from Hollywood film companies, independent producers, and other media companies.



Today, however, aside from distributing licensed content, Netflix also hosts exclusive content, including shows and films intended for global or regional distribution. The first big international success of this model was the series *House of Cards*, which brought the company nearly two million new subscribers in the first quarter of 2013.³⁵

In 2011, Netflix launched its service in Latin America. Despite the digital gap and limited access to credit cards, the service was well received among urban consumers with access to broadband internet, who were enticed by the enormous amount of content offered by the service. In the following years, the company began offering original content tailored for the Latin American market. According to Paula Pinha, Director of Public Policy at Netflix, "working with independent producers is key to this achievement. And this translates into major investments in local content, which in turn means significant opportunities for the creative ecosystem."³⁶

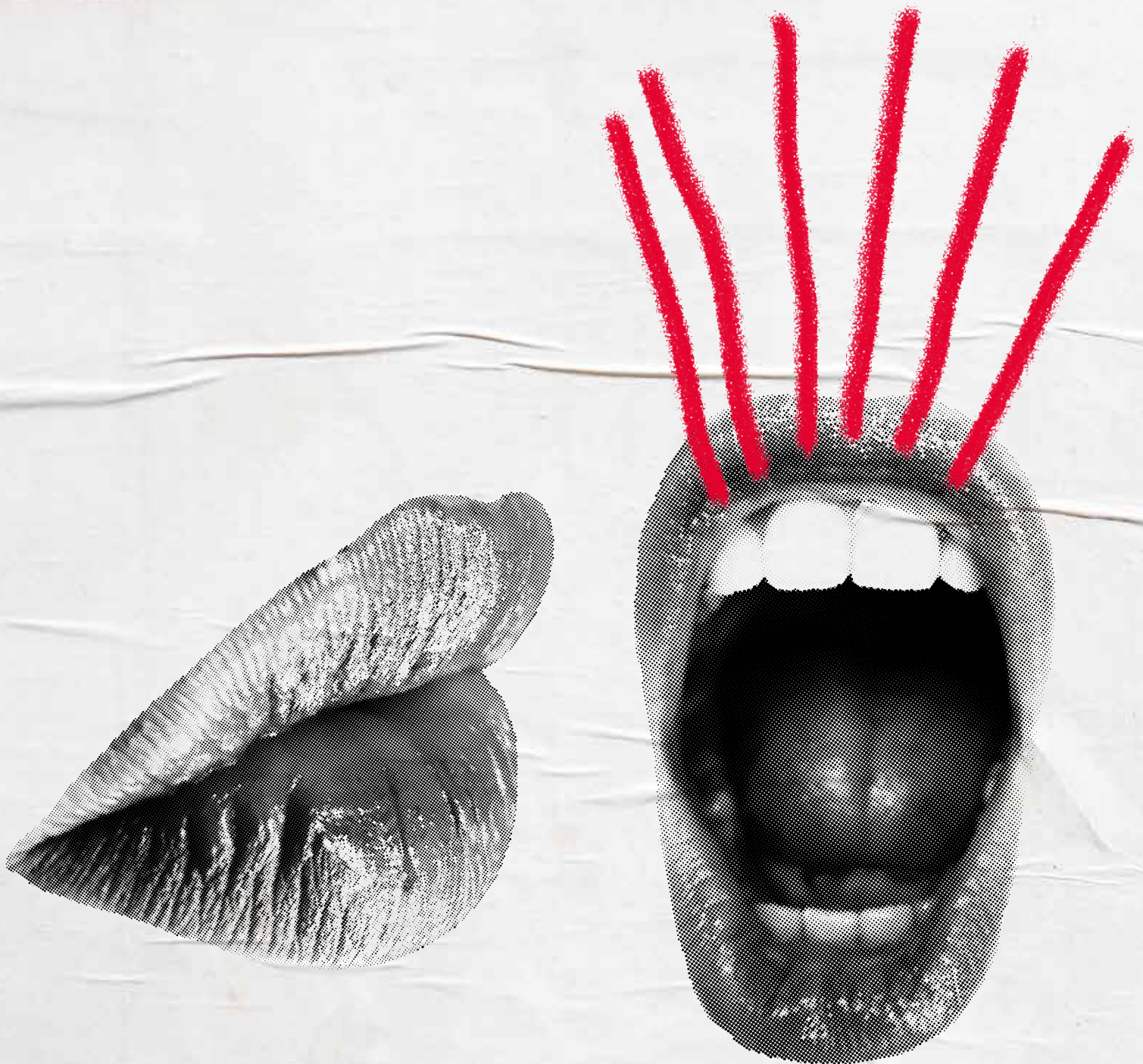
In 2015, Netflix launched its first original productions in Latin America. Its debut Spanish-language original was *Club de cuervos*, produced with Alazraki Entertainment. The series was shot and produced in Mexico, and the main cast was Mexican. Later that same year, the company launched the Brazilian dystopian drama *3%*, created with São Paulo-based Boutique Filmes. Both series followed in the footsteps of HBO Latin American productions of the previous decade, such as *Epitafios* and *Capadocia*, which combined local talent with Hollywood production standards and storytelling power.

The pattern would be repeated around the globe. In Spain, the series *La casa de papel* (*Money Heist*, 2017), whose first season was produced by Atresmedia before being acquired by Netflix, would become the most viewed series on the platform in 2020.³⁷ According to Francisco Ramos, VP of Content for Latin America, more than 80% of new Netflix subscribers come from outside the United States.

35 Laura Siri, "El rol de Netflix en el ecosistema de medios y telecomunicaciones: ¿El fin de la televisión y del cine?" *Hipertextos* 5 (2016), 65.

36 Paula Pinha, personal communication (October 12, 2020)

IN 2015, NETFLIX BET ON ORIGINAL LOCAL CONTENT, ANNOUNCING THEIR FIRST PRODUCTION IN SPANISH: *CLUB DE CUERVOS*. THIS SERIES, PRODUCED IN CONJUNCTION WITH ALAZRAKI ENTERTAINMENT, WAS FILMED AND PRODUCED IN MEXICO, WITH MEXICAN PROTAGONISTS.



The company produces similar volumes of content inside and outside the United States, with film shoots taking place in more than 100 countries.

In Latin America, Netflix has worked with some of the region's most notable creators, bringing their work to global audiences. Alfonso Cuarón, Salma Hayek, Fernando Meirelles, Guillermo del Toro, Carlos Saldanha and Diego Luna are among those who have worked with Netflix as actors, directors and producers in both feature films and series. But streaming has also increased the visibility of emerging filmmakers throughout the region, amplifying the work of some of the most highly regarded figures of Latin American independent filmmaking, including Amat Escalante, Marcela Said, Alonso Ruizpalacios, Pedro Aguilera, Laura Mora, Pablo González, Alejandra Márquez Abella, Manolo Caro and Mauricio Leiva-Cock.

The model's success taught a valuable market lesson, namely that the growth of streaming goes hand-in-hand with providing high-quality content tailored to the specific tastes of local audiences.

In 2018, Amazon Prime Video launched its first streaming series intended for the Mexican audience: *Diablo guardián*. In the years since, HBO, Disney+, Claro, AppleTV+, Blim, Movistar+ and GloboPlay have

followed a similar path and have increased their number of products created for local markets in Latin America, made available on their VOD platforms.

According to data from FTI Consulting and PwC, in 2020, one in five Latin American households owned at least one subscription to a streaming service.³⁷ **Given the model's success and the growing need to capture and retain subscribers, companies currently competing for a share of the streaming market are projected to invest hundreds of millions of dollars to acquire and produce content in the region. And annual budgets can compare to those associated with building a car manufacturing plant or an interstate highway.** According to a recent study by Olsberg SPI, a major film incurs an average weekly expenditure of approximately \$9.9 USD.³⁸

In 2020, Netflix announced its intention to invest \$200 million in local content for Mexico.⁴⁰ A year later, Netflix revealed that the amount for 2021 would increase to \$300 million USD. According to data from NextTV, this would translate into 14 Mexican productions (nine series, two feature films and two shows), plus licensing fees. In Brazil, a similar announcement was made amounting to 350 million Brazilian reais.⁴¹ In January 2021,⁴² Amazon announced that, in the next five years, it would produce "15 new original and local series and five original and local films" in Mexico. Two months later, it announced three original series intended for the Brazilian market.⁴³ Disney has also announced 70 Latin American productions, and WarnerMedia made public that it would be launching HBO Max in the region in 2021 (replacing HBOgo). As part of that launch, HBO is set to premiere more than 100 original Latin American productions in the next two years. Reports from Uruguay indicate that several Amazon Prime Video projects are in various stages of production, including the crime series *Losi, el espía arrepentido*, featuring Uruguayans in the lead roles, the Brazilian series *Sentença*, an HBO series, as well as future productions for Sony, Netflix and Disney+.⁴⁴

Contrary to media conglomerates in the late 20th century that controlled both content distribution and production, streaming companies are in control of the former, whereas the latter is often in the hands of local production companies. These partners are generally not large film studios. Instead, they are independent production companies working together with other local, regional or international players to ensure they are able to meet project demands. In recent years, a diverse production ecosystem has flourished. Some of the companies mentioned in the interviews, upon which this publication is based, include Noc Noc Cinema, La Corriente del Golfo, Alazraki Films, Caponeto, Lemon Studios, Vice Studios and Argos Comunicación. In 2019, these production companies all developed streaming content in Mexico.⁴⁵ Some of the major Brazilian players include Gullane, O2, Prodigio Films, Zazen Produções and Boutique Films. Other relevant production companies in the region include Polka (Argentina), Dynamo (Colombia), Fabula and Invercine y Wood (Chile). Most of these companies were founded by established filmmakers. However, a few of the newer players have been set up by up-and-coming creators who have used streaming to launch some of their first projects.

37 Isobel Lewis, "Netflix's most watched shows of 2020," *Independent* (December 23, 2020). <https://www.independent.co.uk/arts-entertainment/tv/news/netflix-most-watched-shows-2020-b1778004.html>

38 FTI Consulting, "Is Latin America Ready to Binge" (August 24, 2019). <https://www.fticonsulting.com/insights/fti-journal/is-latin-america-ready-to-binge>

39 Olsberg SPI, *Global Screen Production*, 7.

40 Agustín Bertran, "Netflix plans to invest about USD 87 million in Brazilian productions in 2020," *Nextv News Internacional* (September 12, 2019). <https://nextvnews.com/netflix-plans-to-invest-about-usd-87-million-in-brazilian-productions-in-2020/>

41 Agustín Bertran, "Netflix plans to invest about USD 87 million in Brazilian productions in 2020," *Nextv News Internacional* (October 30, 2019). <https://nextvnews.com/netflix-plans-to-invest-about-usd-87-million-in-brazilian-productions-in-2020/>

42 Infobae, "Fuerte inversión y decenas de producciones: Amazon Prime Video apuesta por México para su expansión en español" (January 28, 2021). <https://www.infobae.com/america/entretenimiento/2021/01/28/fuerte-inversion-y-decenas-de-producciones-amazon-prime-video-apuesta-por-mexico-para-su-expansion-en-espanol/>

43 Karol Albuquerque, "Amazon Prime Video announces original Brazilian series," *Olhardigital* (March 2, 2021). <https://olhardigital.com.br/en/2021/03/02/cinema-and-streaming/amazon-prime-video-announces-original-brazilian-series/>

44 TV Show, "HBO y Amazon vinieron a filmar a Uruguay: conocí los títulos y los famosos del elenco" (January 22, 2021). <https://www.tvshow.com.uy/series/hbo-amazon-vinieron-filmar-uruguay-conoce-titulos-famosos-elenco.html>

45 *Anuario Estadístico de Cine Mexicano 2019*, 45.

As in other industries, many of the barriers for participation in the audiovisual industry have fallen. Although the investments in infrastructure required to create content are considerable, there are other important factors when it comes to creating a successful end product. Ideas, technical skills, talent and storytelling capabilities are all key to success. As in the creative industries in general, ideas are as important as physical infrastructure. If only a few decades ago, high investment costs and the need to partner with a TV channel in order to distribute content meant that only large conglomerates had the capacity to produce a film or series, today, an increasingly high number of independent production companies pitch, write, develop and produce audiovisual content that is in turn acquired by streaming companies under diverse licensing schemes for online distribution.

In the coming years, competition for the regional streaming market will be tough. Growing internet access, combined with demand that has shown little sign of abating even during economic turmoil, and the appearance of a slate of new companies such as Disney+, Paramount+ and AppleTV+, among others, suggests that companies will do all they can to increase—or retain—their subscribers. Even the coronavirus pandemic, with its devastating effects on national economies, was unable to curb the global demand for streaming.⁴⁶ If we add to this the proven model of producing local content as a form of engaging audiences, it is very likely that the demand for this type of content—and, thus, for high-quality production services by local ecosystems—will also increase.

It is important to note that many of the changes taking place in the audiovisual industry are occurring in an increasingly volatile and complex context of media production. Prior to the 2020 pandemic, and despite the rise of streaming services, movie theaters continued to play a decisive role in distributing and financing productions (films often recoup a significant part of their investment when they premiere in movie theaters). Before the pandemic, the number of tickets sold in countries such as Colombia, the Dominican Republic and Mexico had been steadily increasing year by year. By late 2020, however, movie theaters had lost significant revenue due to social distancing restrictions, and large movie chains operating in Latin America, such as Cinépolis, Cinemark and Cinemex, were facing economic hardships and uncertainties.⁴⁷ Data from Colombia, for instance, showed a drop from 73.1 million moviegoers in 2019 to 12.6 million in 2020.⁴⁸ Given this harsh global reality, WarnerMedia did something that would

have been unthinkable before the pandemic—it released a major film on streaming (HBO Max) before premiering it in cinemas. Something similar occurred with a significant part of Argentina's 2020 film production, which premiered on the CINE.AR channel and the CINE.AR Play app without being first released in movie theaters, which were closed during a significant part of 2020.⁴⁹ In order to make this possible, the National Institute for Cinema and Audiovisual Arts (INCAA) of Argentina approved a resolution that modified its regulations to allow producers to receive a movie theater exhibition subsidy despite releasing their films digitally (Resolution 166/2020).⁵⁰ This also occurred in other countries of the region. Although it is not yet clear whether this tendency is irreversible, some of the experts consulted for this publication noted the likelihood that the distribution window (the time between a film's release in a movie theater and its distribution on streaming platforms) will shorten in a post-pandemic world.

It is important to stress that open television channels still continue to be more widely viewed than streaming. According to data from the Federal Institute of Telecommunications of Mexico (IFT), 76% of the urban population and 79% of the rural population watch open television, whereas only 21.6% of the urban population and 6% of the rural population watch Netflix.⁵¹ Despite this sizable gap, **future scenarios suggest that both pay and open television will be increasingly accessed on internet-connected devices.** According to estimates by Digital TV Research, the number of Latin Americans with access to pay TV services is expected to drop from 72 million subscribers in 2017 to 67 million subscribers in 2025.⁵²

In other words, the medium-term horizon suggests that streaming will not be limited to subscription video on demand. Instead, it is likely to also become a vehicle for both public and pay TV. During the pandemic, film festivals, independent cinema, theaters and animators, among others, also opted for streaming as a tool for content distribution. This suggests a future in which streaming will become increasingly extensive and diverse.

46 BBC News, "TV watching and online streaming surge during lockdown" (August 5, 2020). <https://www.bbc.com/news/entertainment-arts-53637305>

47 Edgar Apanco, "El silencio de Cinemex y el futuro de las salas multiplex," *Cine Premiere* (February 26, 2021). <https://www.cinepremiere.com.mx/cinemex-cierre.html>
Daniel Arias, "¿Se extinguirán las salas de cine?," *Los Andes.com* (October 11, 2020). <https://www.losandes.com.ar/estilo/se-extinguiran-las-salas-de-cine/>

48 Claudia Triana (directora de Proimágenes Colombia), personal communication (February, 2021).

49 Impulso Baires, "CINE.AR PLAY se consolida como una de las revelaciones de este tiempo de pandemia" (August 15, 2020). <https://www.impulsobaires.com.ar/nota/285197/cinear-play-se-consolida-como-una-de-las-revelaciones-de-este-tiempo-de-pandemia/>

50 Boletín oficial de la República Argentina, "Instituto Nacional de Cine y Artes Audiovisuales - Resolución 166/2020" (April 27, 2020). <https://www.boletinoficial.gob.ar/detalleAviso/primera/227241/20200328>

51 Instituto Federal de Telecomunicaciones. Encuesta Nacional de Consumo de Contenidos Audiovisuales 2019, 82-93. <http://www.ift.org.mx/sites/default/files/contenidogeneral/medios-y-contenidos-audiovisuales/01encca2019vp.pdf>

52 Panorama Audiovisual, "América Latina perderá cinco millones de abonados a televisión de pago" (September 3, 2020). <https://www.panoramaaudiovisual.com/2020/03/09/america-latina-perdera-cinco-millones-abonados-television-pago/>



CHAPTER 1

THE RULES OF THE GAME CHANGE FOR AUDIOVISUAL INDUSTRY GIANTS

Over the past two decades, Latin America and the Caribbean have advanced in their development of regulatory and cultural frameworks that include the audiovisual sector. During this period, most countries in the region have, for example, created different programs to promote and fund cinema. Following some difficult years at the end of the last century—a notoriously complex period for the Mexican and Brazilian film industries—the ecosystem of audiovisual content production today is experiencing a favorable moment in most of the region. Moreover, this sector was among the first to reactivate after the initial shock of the coronavirus pandemic in March of 2020. However, the three Latin American audiovisual giants (Mexico, Brazil and Argentina) continue to face political and economic complexities that are worth noting.

In early 2021, Mexico was evaluating new ways to finance its industry after the closure of two important avenues: FOPROCINE and FIDECINE. (A new entity, FOCINE, was created to finance the sector.) In 2019, the budget for ANCINE, in Brazil, was reduced by 43% for 2020. The audiovisual industry in Argentina faces difficulties associated with the national macroeconomy. Historical media and television conglomerates such as Globo, Televisa and Clarín are reformulating their channels of distribution due to greater competition from digital advertising.

The Chilean and Colombian industries have grown in recent years. While the audiovisual industry in these two countries has not attained an equivalent size to that of the three ‘historical’ giants, both have made qualitative leaps in the last decade. Chile, despite its small domestic market, has created a high-quality audiovisual industry with major export ambitions. In 2019, it exported \$38.7 million USD worth of “audiovisual services, advertising and animation” to the United States—8.2% more than in 2018.⁵³ Colombia, meanwhile, has grown as a consumer market. In recent years, too, thanks to numerous laws designed to strengthen the sector and the evolution of its local ecosystem, it has increased its capacity to attract foreign productions. From 2013 to 2018, the “export of audiovisual and related services” showed an average annual growth of 20%, placing Colombian audiovisual exports at around \$48.2 million USD in 2018.⁵⁴

Among the challenges these two countries share is how to integrate, on a regulatory level, the recent evolution catalyzed by streaming models. Video on demand (VOD) platforms release content, but they are not broadcasters.

They are an over-the-top media service (OTT) without being tech or software companies. These distinctions are important because they imply that the industry is both emerging and not yet fully defined. This makes it difficult to design relevant legislation that will remain applicable over time, given the constant changes in what must be regulated.

This prompts us to ask two questions: How do we regulate something that is in a state of continual flux? And how do we avoid affecting the services accessed by audiences? The nature of audiovisual content is ultimately appealing to its viewers, who demand more diverse and pluralistic on-screen representations. Understanding this tension is essential to producing better public policies when designing regulatory frameworks in Latin America and the Caribbean.

“Public policy has always failed when it hasn’t been in sync with scientific and technological advancement,” asserts Lucrecia Cardoso, Argentina’s Secretary of Cultural

“OUR CULTURE IS PART OF OUR HERITAGE, BUT IT IS NOT EXEMPT FROM BEING DISTRIBUTED AND MARKETING IN THE CONTEXT OF GLOBALIZATION.”

— Lucrecia Cardoso

Development. “Our culture is part of our heritage, but it isn’t exempt from being distributed and marketed in the context of globalization. The challenge is for public policies to take past developments into account, and encourage them in the understanding that cultural production is a global phenomenon that countries need to promote by supporting their creators and workers, since they now represent a considerable percentage of the region’s economy and enable the world to feel drawn to us through our talent and competitiveness.”⁵⁵

53 ProChile, “Ministro de Relaciones Exteriores y Director General de ProChile inauguran Encuentro de Negocios para empresas del sector audiovisual con foco en Estados Unidos” (November 23, 2020). <https://www.prochile.gob.cl/noticia/ministro-de-relaciones-exteriores-y-director-general-de-prochile-inauguran-encuentro-de-negocios-para-empresas-del-sector-audiovisual-con-foco-en-estados-unidos/>

54 Cámara de Comercio de Bogotá, “Colombia exporta más de 80% de su producción cinematográfica a EE.UU.” (March 2019). <https://www.ccb.org.co/Clusters/Cluster-de-Industrias-Creativas-y-Contenidos/Noticias/2019/Marzo-2019/Colombia-exporta-mas-de-80-de-su-produccion-cinematografica-a-EE.UU>

55 Lucrecia Cardoso, personal communication (January 4, 2021).

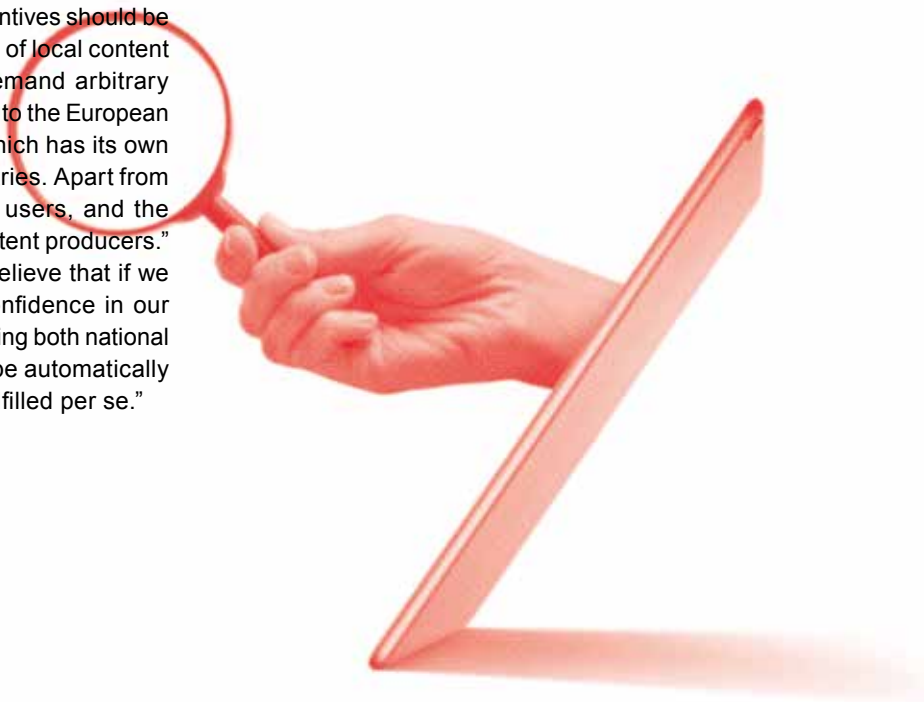
The Latin American Observatory for Regulation Media, and Convergence (Observatorio Latinoamericano de Regulación, Medios y Convergencia, OBSERVACOM), the Uruguay-based organization devoted to studying different audiovisual laws across the region and issuing recommendations to OTT services, insists on the need for regulation that guarantees the protection of audiences, free competition, net neutrality and—above all—human rights. OBSERVACOM also suggests that our countries follow the model promoted by the European Union, which includes, in addition to production incentives, mechanisms to ensure diversity and free competition: the European content quotas. In other words, the platforms are required to offer a certain percentage of European productions or co-productions. These in turn will need to be supported by prominence measures which must translate into added visibility for the titles on the platform.

Many other interviewed experts, however, believe that the reality of the European Union, which governs 27 member states, is so different from the Latin American reality that it cannot be replicated. Copying their model would thus be arbitrary. They believe it makes more sense to develop targeted policies addressing the specificities of the Latin American reality.

Cardoso believes that production incentives should be prioritized: “We are confident that the quota of local content can be self-fulfilled without needing to demand arbitrary percentages. We cannot compare ourselves to the European Union, which is a continental block, and which has its own parliament to legislate for all member countries. Apart from that, it has an enormous critical mass of users, and the European Union countries are colossal content producers.” She advocates for a mix of the two: “We believe that if we do things right and the platforms have confidence in our region, creating production hubs and producing both national and international content, this debate can be automatically resolved, since the screen quota will be fulfilled per se.”

Yvette Marichal, head of the Dominican Republic Film Commission (DGCINE) at the time of this writing, is convinced that the solution lies in the audiences themselves, who are naturally inclined toward content that depicts their experiences and portrays their daily lives on screen: “When they go to the movies, Dominicans consume local films more than anything else. More people went to see Dominican movies than *Star Wars*.”⁵⁶

Whether a country is medium-sized or large, it is important for its government to include the audiovisual sector as a possible magnet for global investments that move billions of dollars throughout the world. Major markets have both talent and infrastructure, but they often lack training, funding mechanisms and up-to-date political frameworks that would make their industries competitive on the necessary scale. Many countries around the world are competing to develop an audiovisual industry, and the region’s ‘audiovisual giants’ should not rest on their laurels—an industry needs more than historical inertia in order to thrive.



56 Yvette Marichal, personal communication (November 2, 2021).

MEXICO: A NEW GOLDEN AGE?



BECAUSE YOU WERE INTERESTED IN:

*Mexico, independent production, promoting production, auteur film,
independent film, training*

Mexico became an epicenter of the film industry during the 1940s. In the following decades, performers such as Pedro Infante and Dolores del Río, as well as characters like Cantinflas and Pepe el Toro, were known from Texas to Tierra del Fuego. Mexican epics reached screens in Romania and its comedies were applauded in Spain. This period became known as the Golden Age, and it was marked by both the volume and quality of its productions. Mexico has been a major engine in the global audiovisual field ever since. Except for a couple of difficult decades (primarily 1980-1990) when film figures dropped, Mexican productions have attained an international scope, earning the country not only economic growth but also soft power and global recognition.

In particular, the last decade has seen a renaissance of audiovisual production, including film, television and streaming content. For many reasons, Mexico, with a population of 126 million and a high development index, is an attractive market for any business that wants to create audiovisual content. The country is a major consumer of films and series, but its productions are also quick to spread all over the world: films like *Los olvidados* (*The Young and the Damned*, 1950) and *Amores perros* (1998) are now classics of world cinema. Hollywood films inspired by Mexican themes, such as *Coco* (2017), an animated film about the Day of the Dead, and *Frida* (2002), have been international box-office hits. It should be stressed, too, that its population has accepted streaming services with open arms. Today, according to Dataxis, Mexico has nearly 12 million subscribers to SVOD services (Q2, 2020). **PwC projects that the over-the-top (OTT) Mexican market will reach \$1.42 billion USD in 2024, becoming the largest market in Latin America.**⁵⁷

It is no accident that, in the past five years, services like Netflix, Amazon, and HBO have produced dozens of programs for the local streaming market: *Ingobernable*, *Diablo guardián*, *Oscuro deseo* (*Dark Desire*), *Sr. Ávila*, and *La casa de las flores* (*The House of Flowers*) are just some of the series that have been successful both within and beyond Mexico's borders.

In recent years, local audiovisual and film productions have reached great heights. Feature films such as *Después de Lucía* (*After Lucía*, 2012), *Te prometo anarquía* (*I Promise You Anarchy*, 2015), and *Roma* (2018) have received important international awards. *Roma*, in particular, became an example of how an auteur film (by Alfonso Cuarón), regardless of its initial concept and execution, could reach a global audience through streaming distribution. Spoken in Spanish and Mixtec, starring first-time actress Yalitza Aparicio, the film won the Oscar for Best Foreign Language Film (now called Best International Feature Film). Documentaries such as *Bellas de noche* (María José Cuevas, 2016) and *Tempestad* (Tatiana Huezo, 2016) have captured the attention of audiences and won awards from top-tier film festivals, nurturing a fertile field of documentary production with viewers across the globe.

In an interview in 2019, the multi-award-winning director Alejandro González Iñárritu predicted a steadily expanding production ecosystem: "There's a greater quantity of productions than we could have imagined, in many formats, many genres... Quantitatively speaking, we're living in a Golden Age."⁵⁸ Iñárritu, who left Mexico in the late 1990s to seek opportunities in Hollywood that he could not find at home, offered an audience of film students a statement of previously unthinkable optimism: "You don't have to leave the country to make movies anymore."

After the outbreak of the pandemic in 2020, Mexico's economic panorama has become more complicated. Cultural budgets have been slashed, and optimism in the film world is less tangible. The coronavirus crisis has hit Mexico especially hard, the country suffering an 8.5% drop in its GDP in 2020.⁵⁹

Some filmmakers interviewed for this publication expressed concern over the elimination of the Fund for Film Investments and Incentives (FIDECINE), as well as of the Fund for High-Quality Film Production (FOPROCINE). Together, these funds financed nearly 700 film projects from 2000 to 2020, almost half the national total.⁶⁰ While the funds have not entirely disappeared, they were replaced by FOCINE, a program with a far more limited budget.

Producer Paula Amor, director of La Corriente del Golfo, believes that small studios will be the most severely affected. "Some companies are in a solid place and will keep on producing, but others aren't so lucky. Some smaller independent companies that are doing wonderful work won't have the same opportunities to keep going."⁶¹

Mónica Lozano, president of the Mexican Academy of Film Arts and Sciences, believes that this reduction will affect subject matter and representation in films. Without independent cinema, though, there is the risk "of becoming a huge manufacturer of content marked by identities that don't belong to us and don't reflect our reality."⁶²

57 PwC, "Global Entertainment and Media Outlook 2020-2024. La industria del entretenimiento y medios se reconfigura." http://explore.pwc.com/mx_gemo2020/wp_gemo2020_mexico

58 UNAM Global. (n.d.). *Ya no hay que salir del país para hacer cine: González Iñárritu*. (Video archive). YouTube. <https://www.youtube.com/watch?v=6cH-hUellBw>

59 Yolanda Morales, "En el 2020, el PIB de México se desplomó 8,5%," *El Economista* (February 25, 2021). <https://www.eleconomista.com.mx/economia/El-PIB-de-Mexico-se-desplomo-8-5-en-2020-la-peor-caida-desde-1932-20210225-0043.html>

60 César Huerta. "Imcine presenta el apoyo que sustituirá a Fidecine," *El Universal* (December 18, 2020). <https://www.eluniversal.com.mx/espectaculos/imcine-presenta-el-apoyo-que-sustituira-fidecine>

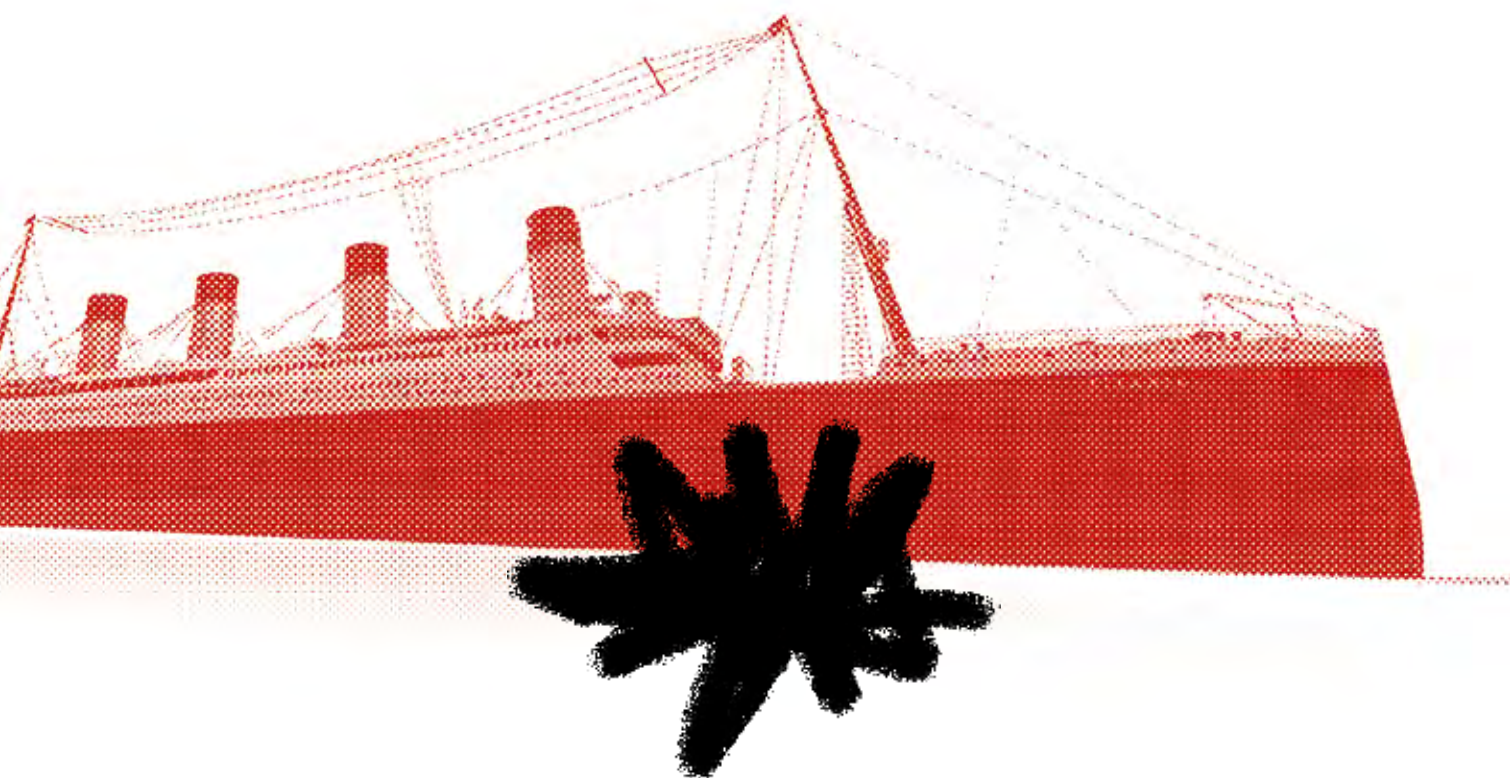
61 Paula Amor, personal communication (December 4, 2020).

62 Mónica Lozano, personal communication (February 19, 2021).

Independent Mexican cinema often plays an invisible role. Although it reaches limited audiences and its themes may seem far-removed from those of 'the masses,' certain interviewed experts stressed its importance as a hotbed of talent and a space for professional development. Many contemporary directors and cinematographers—two occupations in which Mexico excels internationally—emerge from a film university-based talent pipeline both in Mexico and abroad, establish themselves in independent film, and proceed to nourish the national and international audiovisual industry. Some of the most famous filmmakers to have followed this path are Guillermo del Toro, Alfonso Cuarón and Emmanuel Lubezki. Recently, other young filmmakers, such as Alejandra Márquez Abella and Alonso Ruizpalacios, who develop projects for streaming platforms, have pursued a similar route. The existence of this field of talent favors Mexico's audiovisual industry. Hampering its cycles may work against not only independent movies, but also the future of the industry in general.

Mexico, however, faces other challenges that call for long-term vision, for example, a shortage of technical professionals. Lozano claims that, "There's a limited group of lighting engineers, camera people, costume designers, make-up artists, editors and sound engineers, which needs to grow to satisfy the demand." Improving security conditions is another urgent task. Ana María Magaña, Managing Director of MPA México, believes that a lack of security often scares off international productions.⁶³ This is particularly striking in northern Mexico; starting in 2008, some have pointed out that an increase in violence froze the development of production hubs such as Rosarito-Tijuana, which became famous in the 1990s for housing the studios where James Cameron filmed *Titanic*.⁶⁴

However, it now appears that Mexico has everything it needs to recover from the shock of the pandemic and to advance its audiovisual industry: it has talent, stories, and an enviable global presence. Production companies from all over Latin America want to make inroads into this market, which they see as a platform to the world, equipped with infrastructure and access to investment. Nevertheless, audiovisual and government professionals will have to work on determining the best ways to enrich this field. It will be essential to strengthen successful programs and collectively diagnose areas of opportunity so that the new Golden Age can become an enduring reality.



63 Ana María Magaña, personal communication (January 29, 2021).

64 Nuria Rozas, "Así es el estudio de cine acuático más grande del mundo," *Diario SUR* (September 7, 2016). <https://www.diosur.es/culturas/cine/201608/22/aguas-hollywood-20160822084343.html?ref=https:%2F%2Fwww.google.com%2F>

“MEXICO HAS QUALITY, VARIETY, PRICE AND INDUSTRY”

BECAUSE YOU WERE INTERESTED IN:

Mexico, independent production, telenovelas, investment, VOD, contemporary series

When Epigmenio Ibarra left his job as a war correspondent in the 1990s and founded the independent production company Argos Comunicación, the Mexican TV market consisted of two enormous corporations: Televisa and TV Azteca. The arrival of an independent production company was, in his words, “unprecedented,” and the idea of producing content on the margins of such massive enterprises seemed like mission impossible.

Ibarra dreamed of making documentaries that could change the country. But he soon had a revelation: if he wanted to change Mexican culture, it would be easiest to do so through popular formats. If melodrama had worked as a means of “emotional education” in mid-century Mexico, then why not use the same format to address the issues affecting society in the 1990s?

In 1997, Argos produced *Mirada de mujer*. This telenovela, starring Angélica Aragón and based on the Colombian telenovela *Señora Isabel* (1993), told the story of a woman who fell in love with a younger man. The show revolutionized depictions of female leads in Mexico—until then, they had either been victims or villains, selfless or evil mothers, with little nuance and not much of a voice. In *Mirada de mujer*, the protagonist was a strong woman who questioned conservative society and brought taboos like female sexuality into everyday conversation. The telenovela was an absolute hit for Argos and TV Azteca, which distributed it. Rubén Jara, founder of Ibope, once said that no telenovela had ever left such a profound mark on the Mexican psyche.⁶⁵

Argos Comunicación continued to produce content for television. In 2008, it collaborated for the first time with HBO to produce *Capadocia*, a series that endeavored to bring the brand’s formats, known for their high production value, to the Mexican market. Ibarra recalls that *Capadocia* showed signs of something that would come later—a transition to a new kind of TV in which plot matters less than

characters, narrative arcs are denser and the means of production are closer to film than to television.

His prediction came true, and this new form of production has exploded. According to Ibarra: “We’re living in a very exciting time because five years ago, this didn’t exist. Imagining an industry of independent content production was a utopia shared by three or four production companies.⁶⁶ He attributes this shift directly to the emergence of Netflix in the Mexican market, which demands, all over the world, more local content to complement its global catalogue.

FROM THE 180-EPISODE TELENOVELA TO THE 18-EPISODE THRILLER

If a production company has historically produced telenovelas, is it ready to make a series? What changes do new TV formats demand? In the case of Argos, investments have focused on building more infrastructure and upgrading their post-production studios. One such initiative involved founding Cinematic Media, a company devoted to color correction, editing, sound and delivery. According to Ibarra, it required an investment of about \$5 million USD.

He also remarked that, as opposed to the 1990s, when he was producing for local television companies, he now works mostly for companies outside Mexico, that is, he exports. “We produce everything in Mexico. 80-85% of the business depends on foreign clients and 15% on production companies that also work for clients abroad.” This underscores the trend that foreign companies demand content made in Mexico.

65 Paul Julian Smith, “Netflix’s The House of Flowers and the New Telenovela,” *Film Quarterly*, vol. 72 (2019), 59-61.

66 Epigmenio Ibarra, personal communication (October 28, 2020).

“WE’RE LIVING IN A VERY EXCITING TIME BECAUSE FIVE YEARS AGO, THIS DIDN’T EXIST. IMAGINING AN INDUSTRY OF INDEPENDENT CONTENT PRODUCTION WAS A UTOPIA SHARED BY THREE OR FOUR PRODUCTION COMPANIES”

— Epigmenio Ibarra



Ibarra believes that the country is in a privileged position to take advantage of the growth in streaming. “Mexico has quality, variety, price and industry, but it needs to keep growing.” To do so, it also needs the number of professionals to grow. In the coming years, there will be a serious need for “production designers, assistant directors, directors, colorists, everything,” he warns. “There aren’t enough people for all this work. The competition for directors and cinematographers is intense.”

For the time being, Argos’s faith in new formats has borne fruit. Two of its standout productions have been *Ingobernable* and *Oscuro deseo* (*Dark Desire*) both for Netflix. These series have something in common with *Mirada de mujer*: a strong and mature female lead determined to explore her own complexities.

The content produced by Argos proves that global audiences want to consume Mexican stories. *Ingobernable* (2017), starring Kate del Castillo, found viewers in countries such as Turkey, Italy and South Korea.⁶⁷ In addition, 35 million Netflix accounts in 77 countries chose to watch *Oscuro deseo*, starring Maite Perroni, which became one of the top ten most viewed Netflix series in June 2020.

Can these streaming-era products give Mexico the imaginary representation it once found in telenovelas, which promoted a mysterious, sensual and even luxurious image of the country in far-flung corners of the world? “It’s time for us to attain that relevance,” Ibarra believes.



67 About Netflix, “Netflix Expands its Latin America Investments, Announcing New Original Series, *Diablero*, Filmed Entirely in Mexico” (August 2, 2017). <https://about.netflix.com/en/news/netflix-expands-its-latin-america-investments-announcing-new-original-series-diablero-filmed-entirely-in-mexico>

COLOMBIA

EMERGES AS AN AUDIOVISUAL POWERHOUSE



BECAUSE YOU WERE INTERESTED IN:

Colombia, independent production, incentives, telenovelas, public policies

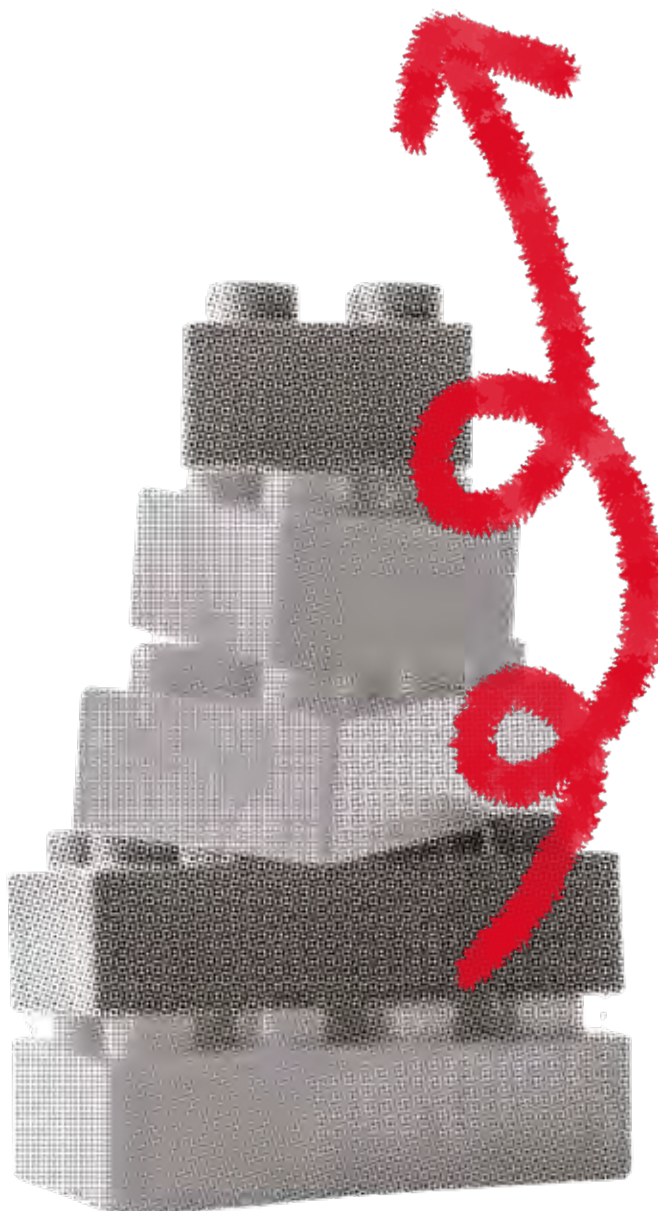
Colombia is not the country that exports the most, that produces the most or that has invested the most. But it is unquestionably one of the countries that has built the most: ten years ago, it did not have much of an audiovisual industry beyond television, and now it has a thriving ecosystem. When sector experts want to point to a country that is doing things quickly, they almost always say, “Look what Colombia is up to.”

It is not that it was an audiovisual desert before: Colombia had been producing successful telenovelas since the 1980s. Moreover, with the 1994 premiere of *Café con aroma de mujer*, it began its ascent as a national exporter not only of telenovelas but also of screenplays and adaptations for the small screens of the world.⁶⁸ This process culminated with *Yo soy Betty, la fea* (1999), a telenovela that was later adapted into more than thirteen local versions⁶⁹ (Vietnam, China, the U.S., Brazil and even the country of Georgia all had their own Betty), leading some to consider it the most successful telenovela of all time.⁷⁰

By 2010, however, Colombia had not yet developed much national cinema, and since it did not have a production service industry firmly in place, it was largely off the radar of international production companies.

Colombia also had an image challenge. Due to the social conflicts that tormented the country for much of the 20th century, the global perception was that of a place plagued with danger. For a sector like the audiovisual industry, which requires security and stable conditions, filming there seemed like a high-risk sport. Only certain international productions dared to do it; many of them produced documentaries that focused—with a measure of sensationalism—on Colombia’s social and political conflicts.

But Colombia had a plan. Since 2003, when the Film Law was approved, legislation has sought to accelerate the sector’s growth. Thanks to those efforts and to a bold package of production incentives and stimuli, Colombia has managed to increase both the number of national films produced and the number of international productions filmed in the country. In this way, it went from premiering 18 national films in 2011 to 37 in 2018.⁷¹ Now, the Colombian industry occupies fourth place in the region for audiovisual exports.⁷² According to Felipe Buitrago, Colombia’s former Minister of Culture, if the sector recovers and resumes growing as steadily as it had in the years prior to the pandemic, Colombia could attain 1% of the audiovisual market on the global level in the next five years.⁷³



68 Janet McCabe and Kim Akass, *TV's Betty Goes Global: From Telenovela to International Brand*. (Londres: IB Tauris, 2013), 50.

69 Rocío Quispe-Agnoli, “La telenovela latinoamericana frente a la globalización: roles genéricos, estereotipos y mercado.” *La Mirada de Telemo 2* (2009), 6. <http://repositorio.pucp.edu.pe/index/bitstream/handle/123456789/20338/pdf.pdf?sequence=1&isAllowed=y>

70 Quispe-Agnoli, “La telenovela latinoamericana...,” 6.

71 Cine Colombia Distribución, *Resumen Industria Cinematográfica Colombia* (2018), 21. <https://www.proimagenescolombia.com/secciones/centrodoc/estudios.php>

72 Yolanda Amaya, “Exportaciones: la producción audiovisual se posiciona bien,” *El Tiempo* (March 18, 2019). <https://www.eltiempo.com/economia/exportaciones-la-produccion-audiovisual-se-posiciona-bien-338926>

73 Felipe Buitrago, personal communication (November 19, 2020).

In recent times, many international productions have made use of the cash rebate, established in Law No. 1556 of 2021, which provides for a reimbursement of 40% of the expenses incurred by production companies on national pre-production, production and post-production services, as well as 20% of logistical expenses.

One such film is *Triple Frontier* (2019), a super-production starring Ben Affleck and Pedro Pascal, which shot several scenes in the outskirts of Bogotá. Another example is *Gemini Man* (2019), starring Will Smith and directed by Ang Lee, which shot action scenes amid the alleyways and old walls of Cartagena. *The Boy* (2015), produced by Elijah Wood, took advantage of the Colombian incentive to build a set that would have been financially unattainable in the U.S.⁷⁴ Although the story is set in a motel in a remote area of Colorado, the filmmakers opted to shoot it near Medellín, in a town with a geographical resemblance to the southeastern U.S. Other international productions shot in Colombia include *The Padre* (2018), *Mile 22* (2018), *The Belko Experiment* (2016), *The Lost City of Z* (2016), *Out of the Dark* (2014) and episodes of *Narcos* (2015).

To be eligible for the incentives, these productions are required to work with a Colombian partner. This has prompted an ecosystem of local audiovisual companies that have grown and professionalized at great speed. The best-known is Dynamo, which has established itself as one of the largest independent production companies in Latin America and a reference point in the VOD world, with 40 feature-length films and nearly 20 fiction series under its belt, including *Narcos* and *Narcos 2* (Netflix), *El Chapo* (Univisión), *Falco* (Amazon Prime Video) and *Arde Madrid* (Movistar+). Apart from its central office in Colombia, Dynamo also has representatives in Mexico City, Madrid and New York.

Another interesting case is Congo Films, a company founded by the director Carlos Congote, specialized in renting out state-of-the-art equipment for local and foreign productions. The company, which also offers workshops and technical courses, leases equipment to productions in Mexico, Peru and Chile, where it recently opened a branch. Congote has seen his business grow in recent years and describes the current system as “very favorable.” He adds that the incentives “have helped the industry grow, and we’re growing along with it.”⁷⁵

This optimism extends to artists like Pablo González, the screenwriter of *Historia de un crimen: Colmenares* (2019) and director of *El robo del siglo* (2020), both series developed for streaming platforms. González looks approvingly on the latest changes to Law No. 1556, announced in 2020, which incorporate incentives for series, music videos and advertising. “I think that’s going to be a big help for us,” he says.⁷⁶ He tells us that his experience in Colombia has boosted his recognition as a director; he is currently working on two projects outside Colombia. This is an increasingly common situation for Colombian audiovisual professionals, whose industry is gaining ground on the international scene.

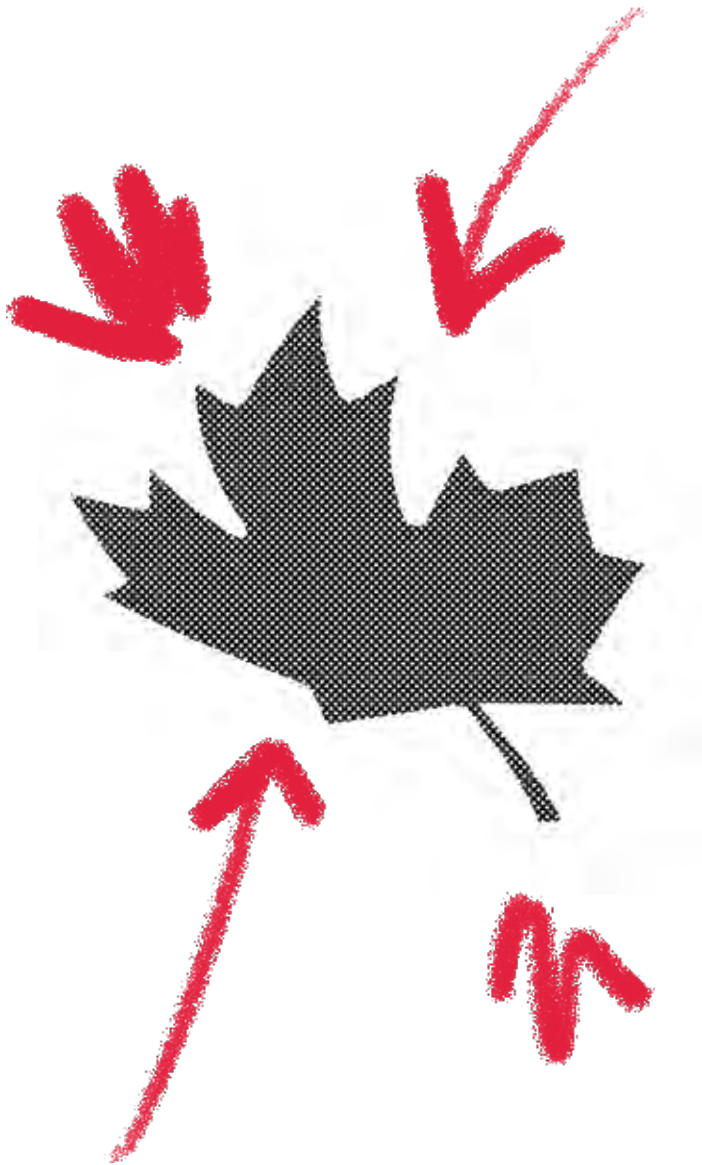
Global circumstances have placed the country in an ideal position to produce high-quality content that aspires to connect the global and the local. While the stereotypes of the past have not completely disappeared (and some, in fact, gave impetus to productions that enthrall audiences worldwide), its narratives present new forms of story-telling. In this sense, Colombia has used its public policies to attract investments, offering artists and companies the flexibility to work on a diverse range of projects. As the industry grows, new projects reaching Colombia no longer come to tell the story of a drug lord. Instead, they are coming here because the country is a good place to make movies.

74 Papa Vinyard, “SXSW ‘15: Vinyard questions director Craig William Macneill and writer Clay McLeod Chapman about THE BOY!,” *Ain’t It Cool News* (March 22, 2015): <http://legacy.aintitcool.com/node/70811>

75 Carlos Congote, personal communication (November 11, 2021).

76 Pablo González, personal communication (October 20, 2020).

WHAT ARE FILM INCENTIVES?



Film incentives are discounts and credits granted to companies who incur expenses on audiovisual services in a territory or country. Although their requirements vary enormously, these programs all seek to attract foreign producers to a region or to foment national audiovisual production.

The first film incentive programs date back to the 1990s and were implemented in Canada.⁷⁷ The Canadian government used them to attract American shoots to the country, and it worked. Cities like Toronto and Vancouver soon replaced New York and Chicago as filming destinations. But the Canadian industry did not limit itself to promoting its locations; it also developed an audiovisual production and post-production service industry that now includes important companies devoted to post-production, animation, visual effects and video games.

Following the Canadian success, certain states in the U.S., such as Louisiana and New Mexico, implemented incentive programs in 2002. These states attracted iconic productions, including the HBO series *Treme* (2010) and the AMC series *Breaking Bad* (2008). Apart from the expenses incurred, these series turned cities that had not previously been seen as such into travel destinations. For example, Albuquerque, New Mexico became a bucket-list item for tourists interested in visiting film and TV locations.

In the first decade of the 21st century, some European nations introduced film incentive programs as well. The first were Germany, the UK and Iceland,⁷⁸ but nearly all the others soon followed. To date, most of the countries in Europe—including Norway, Spain, Ireland, Montenegro, Bulgaria, Malta and Portugal—have these incentive programs. Recently, the trend has expanded into Asia, where Malaysia, Taiwan, South Korea, Thailand and the Philippines have introduced them.

The Colombian incentive program, endowed with a \$12.5 million USD fund, is a model of how to make an industry grow within a short period of time, according to many of the experts interviewed. Since its creation in 2012, several other Latin American countries have also opted to legislate similar frameworks.

The incentives preferred by producers and companies are usually cash rebates, although transferable tax credits are also common in various jurisdictions around the world. The former involves a reimbursement of a percentage of the total qualified expenses, which is paid to investors once they have complied with certain requirements. The latter is a tax credit that the producer can sell to a taxpaying entity, which in turn offsets its fiscal liability with the tax credit. Colombia, the Dominican Republic, Uruguay, Panama, Trinidad and Tobago, and Chile (which has implemented a pilot program) all have incentive frameworks.

⁷⁷ KPMG, *Media and Entertainment Film Financing and Television Programming. A Taxation Guide* (2012). <https://home.kpmg/content/dam/kpmg/pdf/2015/03/Film%20financing%20and%20television%20programming-%20canada.pdf>

⁷⁸ Jonathan Olsberg and Andrew Barnes, "Impact analysis of fiscal incentive schemes supporting film and audiovisual production in Europe," *European Audiovisual Observatory* (2014), 24-25. <https://rm.coe.int/impact-analysis-of-fiscal-incentive-schemes-supporting-film-and-audiov/16808e4506>

FILM INCENTIVES IN THE REGION (AND IN COMPETING MARKETS)

COLOMBIA

The Colombia Film Fund offers a cash rebate for 40% of the value of direct expenses in audiovisual services and 20% of indirect expenses or logistics for “works of film, series and music videos.”

Another tool to attract foreign investments, introduced in 2020, is the Audiovisual Investment Certificate, which allows access to a tax discount certificate worth up to 35% of the total value of services incurred in Colombia. This tool can also be applied to video games and series.

To be eligible for these incentives, expenses in Colombia must be incurred by “Colombian companies or individuals with Colombian nationality with residency in the country.”⁷⁹

Additional regional incentives include the FilMedellín Incentive, which refunds up to 10% of the total cost in services procured in the city of Medellín.⁸⁰

URUGUAY

A discount of 10.6%, 17.6% or 25% for production expenses in the country, depending on the expense level. This is open to “feature-length films, short films, video clips, animations, documentaries, television productions and international series.” International commercials produced here can access a discount of 20%, provided that the executed expenditure exceeds \$300,000 USD.

Decree No. 220/998 establishes an exemption from payment of VAT (22%) on production expenses incurred for projects designed for foreign markets but filmed in Uruguay.

DOMINICAN REPUBLIC

A 100% transferable tax credit for Dominican films and a 25% credit for foreign productions—“works of film, films for television, series and miniseries for television, documentaries, telenovelas and music videos”⁸¹—with costs over \$500,000 USD and that meet the requirement of hiring at least 25% Dominican staff.

PANAMA

A 25% discount for productions filmed in the country, with an investment of at least \$500,000 USD in local expenses (this percentage recently rose from 15%).

The total reimbursement can be deposited as collateral with an insurance company to ensure cash flow during production.⁸²

⁷⁹ Location Colombia, *Incentivos*. https://locationcolombia.com/incentivos/#move_ley

⁸⁰ Film Medellín. *Beneficiarios Incentivo FilMedellín 2020* (December 30, 2020). <https://filmedellin.com/noticias/incentivo2020/>

⁸¹ Dirección General de Cine. *Guías de los incentivos de la Ley 108-10*. Dominican Republic. <https://dgcine.gob.do/filmar-en-rd/guias-de-los-incentivos-de-la-ley-108-10/#23-25-wpfd-credito-fiscal-transferible-articulo-39>

⁸² See [Filmpanama.gob.pa](https://filmpanama.gob.pa)

FILM INCENTIVES IN THE REGION (AND IN COMPETING MARKETS)

CHILE

Since 2018, Chile has been implementing a pilot program, Support for High-Impact Audiovisual Investments, which provides for a rebate of up to 30% of qualified expenses for television series and films, with a \$3 million USD ceiling.⁸³

TRINIDAD AND TOBAGO

A discount of between 12.5% and 35%, depending on the expense level for foreign productions (feature-length films, films for television, dramatic series or miniseries, documentaries, animations and foreign commercials: a maximum reimbursement of \$3.76 million USD). For local productions, the rebate is a flat rate of 35%, in addition to a 20% rebate on locally contracted labor expenses.⁸⁴

MEXICO

Through EFICINE 189, the country allows taxpayers to allocate resources for the production or distribution of Mexican film projects and co-productions in exchange for a tax credit equivalent to the contributed sum, which may be applied against income taxes (with a maximum of 10% of the yearly taxes).⁸⁵ In the first period of 2021, it supported the production of 55 projects.⁸⁶

It also provides for a VAT refund on 16% of all expenses incurred in the country.

ECUADOR

Zero percent VAT rate for pre-production, production and post-production services. Fifty percent VAT rebate on local purchases and the import of goods and services destined for audiovisual development.⁸⁷

⁸³ Gobierno de Chile, *Chile en acción: Guía para rodar*. Consejo Nacional de la Cultura y las Artes y Film Commission Chile, 2018. <https://oibc.oei.es/uploads/attachments/393/chile-en-accion-guia-para-rodar.pdf>

⁸⁴ See <https://filmtt.co.tt/rebate/>

⁸⁵ Instituto Mexicano de Cinematografía, "Eficine 189. Estímulo fiscal a proyectos de inversión en la producción y distribución cinematográfica nacional," n.d. <http://www.imcine.gob.mx/estimulos-y-apoyos/eficine189/>

⁸⁶ Secretaría de Hacienda y Crédito Público, *Listado de proyectos susceptibles de autorización para la aplicación del Estímulo Fiscal a Proyectos de Inversión en la Producción y Distribución Cinematográfica Nacional, correspondiente a los proyectos de inversión en la producción cinematográfica nacional que ingresaron en el primer periodo del ejercicio fiscal 2021 (2021)*. <https://www.cultura.gob.mx/PDF/Eficine/EFICINE-Produccion-proyectos-susceptibles-1er-periodo-2021.pdf>

⁸⁷ Listado Ecuatoriano del Cine y Audio Visual (LEA). Instituto de Cine y Creación Audiovisual <http://www.servicioscreatividad.gob.ec/lea/filmin.html>

FILM INCENTIVES IN THE REGION (AND IN COMPETING MARKETS)

INCENTIVES IN OTHER REGIONS

GERMANY

The German Federal Film Fund (DFFF) offers a subsidy of between 20% and 25% of approved production expenses⁸⁸ through a series of funds (DFFF I, DFFF II and the German Motion Picture Fund). Since its introduction in 2007, DFFF I and II have reimbursed some 867 million euros and supported 1,501 productions, with investments of 5.1 million euros in the German audiovisual industry.

SLOVAKIA

The Slovakian Audiovisual Fund offers a 33% reimbursement for film content (feature-length films, documentaries or animations) and television series produced in the country. The projects must exceed a minimum budget and pass a “cultural test.”⁸⁹

GREECE

Forty percent discount for “feature-length films, documentaries, television series, animated films and digital games” that feature the country in the cinematography, production phase or post-production phase.

The incentive is applicable to national and international productions as well as co-productions. The fund, administered by the National Center for Audiovisual Media and Communications, is 75 million euros for the 2018-2022 period.⁹⁰

PHILIPPINES

The Film Development Council offers a reimbursement of up to 20%, with a ceiling of 10 million Philippine pesos, through its incentive program for locating film productions in the country.

THAILAND

Since 2017, it has granted a discount of between 15% and 20% for productions that work with a local coordinator and execute expenditures of over 50 million baht in the country.

CONNECTICUT, USA

Ten percent tax credit on production costs between \$100,000 and \$500,000 USD, with an additional 15% discount on projects with qualified costs of over \$500,000 USD. Projects of over \$1 million USD can obtain a credit of up to 30%.⁹¹

⁸⁸ See www.dfff-ffa.de/en.html

⁸⁹ See <https://www.filmcommission.sk/cash-rebate/>

⁹⁰ See <https://www.filmcommission.gr/incentives/40-cash-rebate/>

⁹¹ State of Connecticut. “Tax Incentives.” *Connecticut Department of Economic and Community Development* <https://portal.ct.gov/DECD/Services/Film-TV-Digital-Media/Tax-Incentives>

BRAZIL: A MAJOR INDUSTRY FACES NEW HORIZONS



BECAUSE YOU WERE INTERESTED IN:

Brazil, independent production, regulation, public funds

Although it shares a border with all but two countries in South America, Brazil has remained culturally distant from its neighbors. The South American giant is the sixth most densely populated country on Earth, a fact that has translated into self-reliance. Brazilian culture (music, literature and film) often seems to follow a different course than Hispanic American culture. Given its extraordinary size, some suggest that Brazil is more like a different planet, one with an autonomous orbit that can generate its own forces of attraction.

In the audiovisual context, Brazil has developed an inward-looking industry, focusing on its own stories and audience. With the rise of Cinema Novo in the 1960s, featuring filmmakers such as Glauber Rocha and Nelson Pereira dos Santos, Brazilian cinema developed an aesthetic gaze driven by a deep desire to untangle its own national complexity. Given Brazil's boundless cultural, geographic and social diversity, there was much to explore. From the concrete jungle of São Paulo to the tropical jungle of the Amazon, and from the green hills of Rio de Janeiro to the arid hinterlands of the Sertão, together with its intricate multicultural roots, Brazil presents an infinite number of topics and social contrasts that fuel art and creativity.

As opposed to the Argentinian audiovisual industry that spread throughout the Southern Cone or the Mexican audiovisual industry that pursued markets in Central and South America, the Brazilian audiovisual industry never relied much on exports to survive. Its vast domestic market—Brazil now has some 210 million inhabitants, making it the largest Portuguese-speaking country in the world—meant that Brazilian productions that attained popularity within national borders were a guaranteed success. However, Glauber Rocha's films and the telenovelas produced by the television network Globo are among the Brazilian audiovisual products with the greatest international scope during the second half of the 20th century.

Today, given digitalization and a global increase in demand, Brazil's audiovisual sector is facing a paradoxical situation. On the one hand, the country has a solid ecosystem, with experienced production companies and a production pipeline with high technical and creative standards. The independent production boom can be ascribed in part to Law No. 12.485 of 2011, better known as the Pay TV Law. This law established quotas forcing TV companies to create content in collaboration with independent producers, drastically increasing the availability of Brazilian projects.⁹²

THE INDEPENDENT PRODUCTION BOOM CAN BE ASCRIBED IN PART TO LAW NO. 12.485 OF 2011, BETTER KNOWN AS THE PAY TV LAW, WHICH ESTABLISHED QUOTAS FORCING PAY TELEVISION COMPANIES TO CREATE CONTENT IN COLLABORATION WITH INDEPENDENT PRODUCERS, DRASTICALLY INCREASING THE AVAILABILITY OF BRAZILIAN PROJECTS

On the other hand, Brazil also faces great uncertainties. Not long before Brazil was pummeled by the COVID-19 pandemic in 2020, substantial budget cuts were announced for the National Film Agency. In October 2020, the newspaper *O Globo* revealed that the agency had approved funding for just one project over the past ten months, whereas in 2018, the agency had approved an average of 25 projects per month.⁹³

Some interviewees compared these cuts to the closure of state-owned company Empresa Brasileira do Filmes, which financed most Brazilian cinema from 1969 to 1990. Its dissolution, justified on free market grounds, heralded an era of minimal film production in the country.⁹⁴ Soon after the cut was announced, in a document signed by 63 Brazilian audiovisual organizations, sector professionals reminded the government that their industry is responsible for economic flows of 25 billion Brazilian reais per year—0.46% of the national GDP—and 330,000 jobs.⁹⁵

Faced with a drop in public patronage, the audiovisual industry is now seeking new ways to move forward. Beto Gauss, the executive producer of Pródigo Films, says that his company's strategy has been to depend less and less on such funding. "Half a decade ago, we decided that our company would work as little as possible with public funds."⁹⁶ This idea is echoed by Rodrigo Guimarães, director of local production at Warner, who comments that "We're starting to explore alternative, 100% private funding models," which means appealing less to state mechanisms like Article 3 of the Audiovisual Law that stipulates the possibility of granting tax credits in exchange for financing independent audiovisual projects.⁹⁷

92 Agência Nacional do Cinema. *Ley de TV Paga*. <https://antigo.ancine.gov.br/es/regulacion/ley-de-tv-paga>

93 *O Globo*, "Ministério Público da 15 dias para Ancine explicar por que aprovou apenas um projeto em dez meses" (October 20, 2020). <https://oglobo.globo.com/cultura/ministerio-publico-da-15-dias-para-ancine-explicar-por-que-aprovou-um-projeto-em-dez-meses-24703679>

94 Centro Técnico Audiovisual, "A Embrafilme" (October 10, 2018). <http://ctav.gov.br/2008/10/10/a-embrafilme/>

95 Terra, "Audiovisual: um setor com importante força econômica" (November 16, 2020). <https://www.terra.com.br/noticias/dino/audiovisual-um-setor-com-importante-forca-economica.e295e555d018a14abf43e23aa6e738f4es0qd5q2.html>

96 Beto Gauss, personal communication (February 25, 2021).

97 Creative Film Finance Forum, *Mesa: Produção de conteúdo original* [Video]. YouTube (April 6, 2021). <https://www.youtube.com/watch?v=ZvEi2LuELi8>

Gauss and other interviewees are somewhat hopeful about the increase in demand for streaming platforms. Today, Brazil has the greatest number of users subscribed to streaming services in Latin America (21.6 million in the third quarter of 2020, according to Dataxis), making it an important market for HBO, which has since 2005 produced Portuguese-language series such as *Mandrake* (2005–2007), *Pico da neblina* (2019) and *Santos Dumont* (2019). In recent years, platforms like Netflix and Amazon Prime Video have produced original series, and Disney has described the content development pipeline for Brazil as very intense. “These 12 months of the pandemic have been our biggest year for new projects and contracts,” recounts Bruno Bluwol, manager of local productions for Disney Brazil.⁹⁸

The presence of the Globo conglomerate in the streaming world also warrants special mention. This company—responsible for some of the most famous telenovelas in Brazilian history, such as *Roque Santeiro* (1985) and *Avenida Brasil* (2012)—now participates in streaming through the Globoplay platform. This service works to gain followers not only in Brazil but also in the Brazilian diaspora across the U.S. and Europe. Reports show that, by January 2021, the service already had 30 million users (including both free and paid accounts) and was in the process of developing 82 original productions.⁹⁹ **In April 2021, under the slogan “The Future is Female,” the company made an appearance at the global MIPTV to announce a series of original projects with female leads, from documentaries to TV drama and crime series.**¹⁰⁰

In response to this new technological wave, Brazilian policymakers have speculated about regulating streaming services. Among the relevant measures discussed are quotas for national content on streaming platforms. At the time of this writing, quotas have not yet materialized. However, there is no evidence that the successful pay TV model can be replicated line by line for streaming, where users are free to select the content they wish to watch. Moreover, without quotas to contend with, platforms are producing local content in Brazil at a scorching pace.

According to Paula Pinha, Director of Public Policy at Netflix, one reason why streaming platforms invest in Brazilian productions is their potential to travel beyond national borders. This has been true of shows like *Cidade Invisível*, a series produced by Prodigio Films, which became one of the top ten most viewed productions on Netflix in over

40 countries,¹⁰¹ and the film *Tudo Bem No Natal que Vem*, which reached 26 million households around the world.¹⁰²

Yet producers, being accustomed to defending the Brazilian nature of national audiovisual output, tend to insist on more regulation. Caio Gullane, partner and producer at Gullane Entretenimento—the creators of *Ninguém Tá Olhando*, which won an International Emmy for Best Comedy Series in 2020—says, “It’s essential for non-English-speaking countries to have regulatory policies in the audiovisual sector to protect each country’s cultural identity and allow the local audiovisual industry to survive.”¹⁰³

Even without regulations, discussions within Brazilian society have an impact on the audiovisual industry. At critical points, productions have engaged with thorny topics. For instance, Brazilian documentaries such as *Democracia em Vertigem* (Oscar-nominated for Best Documentary Feature in 2020), which addresses subjects like authoritarianism and violence, was among the top ten most viewed documentaries in Netflix in 2019.¹⁰⁴ Notably, too, and more than in other parts of the continent, the representation of the Black population has been a topic of heated debate. In 2018, when the telenovela *Segundo Sol*—set in Bahia, a state where 80% of the population is Black—presented an 80% white cast, there was an instant backlash from activists.¹⁰⁵

According to Rodrigo Antonio, Managing Partner of the Association of Black Audiovisual Professionals (APAN), despite recent progress, the Brazilian industry still has a great deal of work to do in this regard. “The internet has helped strengthen connections among Black professionals, and it has become a new means for telling our stories. [But] we face disparities due to persistent racial discrimination.” Antonio laments that the professional development of Black audiovisual professionals, especially screenwriters, producers and directors, lacks the necessary resources. However, he notes, a partial solution may be found in regional training: “In the north of the country, for example, we only have one federal university program related to film. Amazonas is one of three Brazilian states with the greatest demand for filming locations, behind only Rio de Janeiro and São Paulo, but few productions emerge from there.”

All of the Brazilians interviewed for this publication seem to concur that no matter how complex the current circumstances may be, the future of the Brazilian audiovisual sector calls for cooperation among industry stakeholders. “Our market and talent deserve attention and priority focus from all players in order to develop,” Caio Gullane insists. While the possibilities for dialogue are difficult to imagine, some kind of collaboration will be necessary to address their common goals: developing talent, determining a favorable regulatory environment, and continuing to produce Brazilian content that compels audiences worldwide.

As a result, it will be crucial for independent producers, platforms, TV channels and the government to sit down together and plan a shared course. It will not be easy, and it may even seem impossible, but it is unquestionably urgent.

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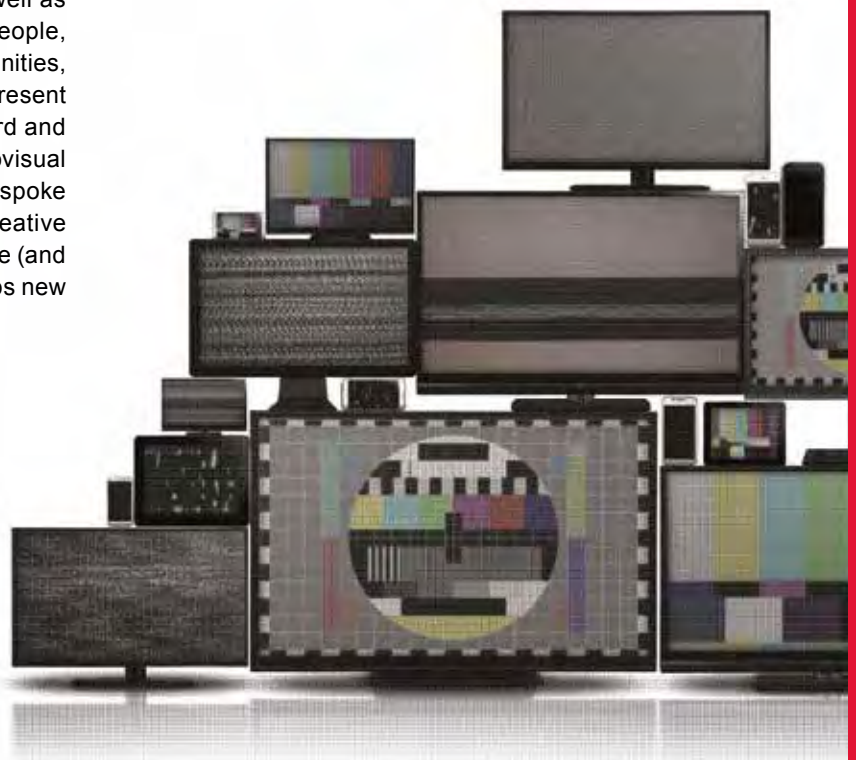
ALL OF THE BRAZILIANS INTERVIEWED FOR THIS PUBLICATION SEEM TO CONCUR THAT NO MATTER HOW COMPLEX THE CURRENT CIRCUMSTANCES MAY BE, THE FUTURE OF THE BRAZILIAN AUDIOVISUAL SECTOR CALLS FOR COOPERATION AMONG INDUSTRY STAKEHOLDERS. “OUR MARKET AND TALENT DESERVE ATTENTION AND PRIORITY FOCUS FROM ALL PLAYERS IN ORDER TO DEVELOP,” CAIO GULLANE INSISTS.



BRAZIL: MARGINAL VOICES TAKE CENTER STAGE

Few nations can boast having the diversity of Brazil, with a territory of continental proportions. The latest demographic census conducted by the Brazilian Institute of Geography and Statistics (IBGE) produced a surprising statistic that reveals a great deal about the self-perception of a country that (like many others in Latin America and the Caribbean) has been represented on screen as white—the percentage of Brazilians who define themselves as Black is 56%¹⁰⁶ and rising. Despite comprising the majority, the Afro-descendant population faces the harshest living conditions, the greatest participation in informal labor, the highest rates of illiteracy and the greatest risk of inadequate housing. The outlook is even more severe for women, especially those living in poverty or racialized communities. The latest report by the Inter-American Commission on Human Rights regarding the human rights situation in Brazil noted that structural inequality is evidenced both by historical discrimination against Afro-descendant Brazilians, indigenous peoples, and women, and socioeconomic discrimination against female rural workers, female forced migrants, the homeless, inhabitants of favelas and marginalized areas, as well as other high-risk groups that include incarcerated people, victims of forced labor, members of LGBTQI+ communities, and adolescents.¹⁰⁷ Thus, the creative industries represent a chance for these often silenced voices to be heard and magnified. In an increasingly digitalized world, audiovisual media is a way to connect to new generations. We spoke with five creators about their experience in the creative and audiovisual industries from a place of dissidence (and racial or sexual difference), where exclusion develops new ways of seeing—and new ways of living, too.

“Inequality in Brazil is based on color, sex and gender and is located at the margins of society. As a result, it is also found at the margins of the spaces of power where decisions are made about our bodies and the future of our generations,” says Evandro Fióti, co-founder, along with his brother Emicida, of Laboratório Fantasma, an entertainment agency that places Black peripheral street culture at center stage. Fióti, who is also a musician, sees the greatest challenge as the lack of corporate spaces “that recognize the need for historical reparations” in Brazil, the last country to abolish slavery and which has a majority Afro-descendant population. “Our art and music are highly renowned abroad, especially art from marginalized communities. If Brazil starts to incentivize our domestic market and our talent, without losing them to genocide and a lack of opportunities, I have no doubt that we could become one of the world’s largest economies.”¹⁰⁸



¹⁰⁶ Nathália Afonso, “Dia da Consciência Negra: números expõem desigualdade racial no Brasil,” *Lupa* (November 20, 2019). <https://piaui.folha.uol.com.br/lupa/2019/11/20/consciencia-negra-numeros-brasil/>

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¹⁰⁸ Evandro Fióti, personal communication (May 25, 2021).

“NO ENTERTAINMENT INDUSTRY WILL ACHIEVE ITS POTENTIAL IF ITS CONTENT COMES FROM A SINGLE CREATIVE SOURCE. THEREFORE, WELCOMING DIVERSITY AS A BASIC PRINCIPLE OF SUCCESS IS KEY.”

Caroline Fioratti is a screenwriter, director and creator of the series *A gran viagem*, nominated for best miniseries at the International Emmy Kids Awards in 2018. Her debut feature, *Meus 15 anos*, focuses on issues affecting young people—one of her major interests, especially if handled honestly, she says. “I like delving into topics that may be taboo but are essential to talk about,” she says of her work as a content creator for teenagers. “There

are two sides to Caroline the artist: the auteur filmmaker who grapples with sometimes unpleasant subjects, and the commercial director who makes use of her ability to communicate with audiences on a massive scale to present them with human issues of diversity and empathy.”¹⁰⁹

Viviane Ferreira, an Afro-Brazilian director and screenwriter, believes that the inequality of Brazil’s audiovisual sector reproduces practices of the past. Her feature film *Um dia com Jerusa* (2019) was the first Brazilian film made by a team of primarily Black women. This decision, Ferreira says, emerged from the desire for the film to be “a huge showcase for the work of other Black women, not just mine.” Ferreira recognizes that the path forward has been a complex one. “Structural racism prevents Brazilian society, and therefore the audiovisual sector, from recognizing in someone who looks like me the capacity to progress through [different professional facets].” For Ferreira, the work of Black artists involves ongoing negotiation. “I always have to convince the sector’s decision-makers about my capabilities,” she laments.

To promote more diverse voices behind the camera, Ferreira insists that “courage, generosity and solidarity” are three necessary elements. “No entertainment industry will achieve its potential if its content comes from a single creative source. Therefore, welcoming diversity as a basic principle of success is key.”¹¹⁰

The producer Carolina Alckmin also sees the audiovisual industry as an opportunity to tell stories that shape the sensibilities of young people. Her next project, *De volta aos 15*, focuses on a 30-year-old woman who, due to a twist of fate, returns to her teenage years. “Although

my generation, the millennial generation, is very different from Gen Z, the transition imposed by adolescence is equally challenging for everyone,” she says. “We step into people’s homes. What we create and write is part of our audiences’ lives. They will dream about these stories and our characters. That’s why we need to be very responsible about the content we create.”¹¹¹ This responsibility filters through the lens of women creators and their role in the audiovisual world. Alckmin explains that there are more women producing than creating, and they—women—become the workforce that allows men’s ideas to take off. A necessary change in her eyes would be to give women a greater creative voice.

Cris D’Amato is a director, known for films such as *S.O.S.: Mulheres ao mar* and *Confissões de Adolescente*. Like many industry professionals, however, she got her start as an assistant director, where she encountered a substantial difference in the pay received by men and women. “At that point, I thought it was due to the merit or experience of many of the male assistants, but then I realized it was a structural bias in the film world,” she recounts. Perhaps for this reason, now that she is a director herself, she has focused on stories featuring women, with whom she feels more comfortable. “I don’t make films thinking about the box office. Instead, I think about reaching an audience that I myself am a part of,” she says.¹¹² Working on content for streaming platforms is a great learning experience, according to D’Amato, because viewers all over the world can enjoy the end product, no matter what language they speak. “The creative vision goes macro,” she concludes.

109 Caroline Fioratti, personal communication (May 23, 2021).

110 Viviane Ferreira, personal communication (June 25, 2021).

111 Carolina Alckmin, personal communication (May 23, 2021).

112 Cris D’Amato, personal communication (May 18, 2021).

ARGENTINA: UNLEASHING POTENTIAL



BECAUSE YOU WERE INTERESTED IN:

Argentina, auteur cinema, incentives, domestic films, cultural consumption

Of all the countries in South America, perhaps none has a more vast cinematic tradition than Argentina. Its film schools are the starting point for many renowned directors, screenwriters and cinematographers. Its companies generate film and television content with global reach and high production standards, earning them a place in the history of world cinema. Over the past century, Argentinian films have received considerable international attention, including seven Oscar nominations for Best Foreign Language Film. Moreover, its professionals are recognized around the world, from composers and cinematographers to sound engineers.

Just a decade ago, Argentina was the audiovisual school for the Southern Cone. If a Latin American wanted to learn how to make films or gain experience, they invariably went to Argentina. In recent years, however, the country's position in the audiovisual industry has faltered. Nearly ten years of economic struggles have hindered the sector from progressing, and this still impedes Argentina from taking full advantage of the industry's global boom.

In the 1990s, Argentina became a leader by passing film legislation (the Law to Stimulate and Regulate National Film Activity No. 24.377 of 1994). This galvanized its film-making industry at a time when countries like Mexico were struggling to secure funds, and the Argentinian industry was catapulted to new heights. It also marked the birth of the trend known as *Nuevo Cine Argentino* (New Argentine Cinema), which reached audiences abroad through directors such as Lucrecia Martel, Adrián Caetano and Daniel Burman. Today, although the audiovisual sector represents 27% of its cultural GDP and 0.71% of its national GDP (a figure similar to that of its mining sector),¹¹³ its industry has narrowed the once enormous gap in relation to other nations. Students who years ago envied its leading edge are now competing side-by-side with the erstwhile star pupil.

"Comparing 2010 with today, Argentina has remained in a similar position, whereas the region has changed radically," says Diego Andrasnik, producer at Polka, one of the country's major independent production companies.¹¹⁴ Andrasnik explains that "the business is smaller and everyone gets a smaller share," an idea supported by the official statistics: in 2010, Argentina produced one thousand hours of fiction per year;¹¹⁵ by 2015, that figure had dropped to 527 hours.¹¹⁶

Today, most of the complications faced by the national audiovisual industry are macroeconomic in nature. Interviewees for this publication mentioned, among other things, restrictions on the purchase and sale of currency, tax complexities, inflation and stricter labor laws than in neighboring countries. All of these factors reduce foreign investment and have caused Argentinian audiovisual professionals to emigrate, trying their luck in other markets.

Nevertheless, Argentina has advantages. For one thing, it is an enormous cultural market—its inhabitants consume music, books and all kinds of audiovisual products, such as film, television and series. Furthermore, it has an eager public. Data from the National Survey on Cultural Consumption shows that 87.7% of Argentinians watch "fiction series or telenovelas," and 57.2% do so "daily or almost daily." In mid-2020, the consulting firm Dataxis estimated approximately 700,000 subscribers to Amazon Prime Video and 4.4 million Netflix subscribers in the country; that is, about a tenth of the national population.

Other streaming companies that have appealed to Argentinians include Clarovideo, HBO and the theater streaming service Teatrix. Andrasnik affirms that production companies like Polka are accustomed to the versatility of this market that demands both romantic comedies and series with high production values, and responds to these disparate audience demands.

Argentina's high capacity as an editorial, artistic and sporting powerhouse translates into a diverse source of stories. In recent years, companies such as HBO and Netflix have invested in content based on local novels and characters, such as *El jardín de bronce* (2017), based on the eponymous novel by Gustavo Malajovich, and the soccer-themed series *Apache: La vida de Carlos Tévez* (2019).¹¹⁷

Adding to the fact that Argentina has prominent film universities, such as the Escuela Nacional de Experimentación y Realización Cinematográfica (National School for Film Experimentation and Production), as well as the Universidad del Cine (University of Film), an educated population, and among the highest rates of internet use in the region, it is evident that the country has everything it takes for its audiovisual service exports to grow beyond their current level (some \$475 million USD, according to data from 2019).

For the audiovisual sector, the economic blow dealt by the pandemic, along with the crisis of recent decades, places Argentina in a difficult position. Many believe that Argentina has the technical and creative talent to overcome this crisis—but the country will need to act quickly to uphold its status. Among the aforementioned policies, some address incentives, while others refer to training and changes to export laws. Given the national situation, Argentina will probably need a combination of all of these factors.

In December 2020, the Law of the System Promoting a Knowledge Economy (Law No. 27.506) was passed, seeking to decrease the tax burden and reduce the export quota to zero for certain sectors affiliated with knowledge-based industries, including audiovisual production and post-production.¹¹⁸ Some Argentinian producers interviewed expressed "optimism" with regards to this effort, which suggests that the government is paying attention to this sector.

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114 Diego Andrasnik, personal communication (November 9, 2020).

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116 Gustavo Aprea, Mónica Kirchheimer and Ezequiel Rivero, "Argentina: cae la producción nacional, crece la extranjera y sin embargo la ficción pierde pantalla." In Guillermo Orozco and María Immacolata (coords.), *(Re)invención de géneros y formatos de la ficción televisiva: anuario Obitel* (Porto Alegre: Sulina, 2016), 119.

117 María Teresa Mangold, Treisy Neyra and César Salazar, *La exportación de servicios audiovisuales en Argentina. Evolución reciente, perspectivas y oportunidades* (Buenos Aires: ICBC Fundación, 2021), 4. https://www.biblioteca.fundacionicbc.edu.ar/images/1/12/Informe_Servicios_Audiovisuales_2020_Final_compressed.pdf

118 Argentina.gob.ar, *Ley de Economía del Conocimiento: se establecen las actividades promovidas* (January 13, 2021). <https://www.argentina.gob.ar/noticias/ley-de-economia-del-conocimiento-se-establecen-las-actividades-promovidas#:~:text=La%20ley%2C%20que%20fue%20sancionada,a%20servicios%20basados%20en%20el>

CHILE:

TOO LITTLE OF A GOOD THING?



BECAUSE YOU WERE INTERESTED IN:

Chile, auteur cinema, series, premium television, production services, VOD



The last half-century of film in Chile has been complex: in September of 1973, following the military coup, soldiers set fire to many of the archives of ChileFilms, the state film company. During the years of the military dictatorship, film was seen as subversive and creative freedom was restricted. As a result, almost all Chilean film productions with any artistic ambition were created abroad (in Sweden, Germany, France, the Soviet Union and other countries).¹¹⁹ In short, just 30 years ago, when Chile began its transition to democracy, cinema practically had to rise out of its own ashes.

Incredibly, it succeeded. Titles like *Machuca* (Andrés Wood, 2006), *La nana* (Sebastián Silva, 2009) and *A Fantastic Woman* (Sebastián Lelio, 2017) won awards in festivals like Vancouver, Sundance, Berlin, San Sebastián and Guadalajara. (*A Fantastic Woman* even won the Oscar for Best Foreign Language Film.) *Historia de un oso* (2014) won the Oscar for Best Animated Short.

In spite of its aesthetic ambitions, Chile does not have a large-scale audiovisual industry for a very simple reason: the absence of a massive domestic market. Its nearly 20 million inhabitants are few compared to the 212 million Brazilians, 126 million Mexicans or even 44 million Argentinians. The audiovisual industry benefits from scale, which has put the Chilean sector at a disadvantage.

Chile, however, is favored by other factors. In recent years, its aesthetic ambition has created a film ecosystem with a reduced output, but its creative and technical talent have soared qualitatively and proven capable of meeting the highest standards. “We are part of a lineage that went from feature films to television, not the other way around. Our working methods started in film and shifted to television—our work with cinematography, sound and post-production. That had an impact on quality,” explains Patricio Pereira, executive producer of Invercine Producciones. He is currently working on a series based on the book *News of a Kidnapping*, by Gabriel García Márquez, for Amazon Prime Video in Colombia, spearheaded by Chilean talent.¹²⁰

Chile may be the most surprising case in Latin America as far as series are concerned. This format—neither telenovela nor feature film—is a direct successor to auteur cinema: well-narrated stories, exquisite cinematography, and actors playing characters who have a dominant role in the narrative arc. The Fabula production company illustrates this. Founded by Pablo Larraín, a director who gained international recognition for *No* (2012, Cannes award winner), and his brother, Juan de Dios Larraín, it is among the most talked about production companies in recent years. In addition to producing feature-length films like *Jackie* (2016), *Neruda* (2016), and *The Club* (2015), it has made incursions into premium content for streaming services. Its series *La Jauría*, which premiered in 2020, was selected by *Variety* as one of the best international series that year. Distributed by Fremantle and produced with funds from the National Television Council of Chile, the Corporation to Foment Production, and its own capital, *La Jauría*, directed by the Argentinian filmmaker Lucía Puenzo, premiered on local television and was internationally distributed through Amazon Prime Video (Latin America and Spain) and HBO Max (U.S.).

“We’re constantly trying to figure out how to grow. These have been years of total expansion in Chile,” says Mariane Hartard, producer at Fabula.¹²¹ “Any pessimist would have told you three, five or eight years ago that we’d reached the peak of our capacity. But in Chile there’s a lot of talent that allows us to keep growing,” she adds.

Hartard believes that the country has qualified technical teams and attributes the sector’s high performance to professionalization through educational programs. She also acknowledges that Fabula has been enriched by international talent, especially from neighboring countries. The clearest example of this pan-Latin American production model may be found in *El presidente*, a series with satirical overtones about corruption in the soccer world that Fabula produced and sold to Amazon Prime Video. The show premiered in 2020. The series stars Andrés Parra (Colombia) and Paulina Gaitán (Mexico), who learned to master the Chilean accent for their roles. The showrunner for the project was Armando Bó (Argentina) and the visual effects work was done in Chile.

119 José Miguel Palacios, “El cine chileno en el exilio,” *Centro Cultural La Moneda*, n.d. <https://www.cclm.cl/especial/el-cine-chileno-en-el-exilio/>

120 Patricio Pereira, personal communication (February 8, 2021).

121 Mariane Hartard, personal communication (January 11, 2021).

"We can create excellent content from the creative side and produce it with high quality. I believe that allows us to export a product that can position itself in an international market," Hartard argues. The Chilean government has intensified its efforts in this regard: the Chilean Economic Development Agency (CORFO), for example, has sought to attract more foreign productions to the country through an incentive program known as IFI Audiovisual. From 2017 to 2019, the program invested 1,627,029,500 Chilean pesos to secure a foreign investment of 6,677,707,814 pesos through three series and a film. "For every peso invested through CORFO, the cost quadrupled and approximately more than two hundred jobs were directly created per project," recounts Isidora Cabezón, CORFO's creative economy coordinator.¹²²

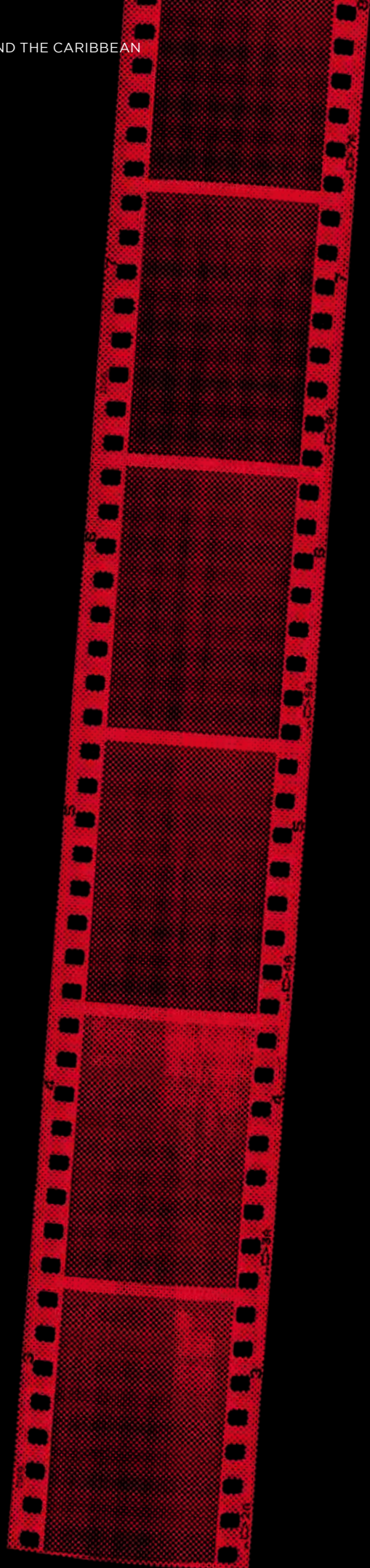
One interesting production model is *Dignidad*, a series co-produced by the Chilean company Invercine y Wood and the German company Story House Pictures. The series, spoken in both Spanish and German, was financed through a fund of Chile's CNTV, as well as with German and Chilean capital. It premiered on the German SVOD platform Joyn and on the Chilean free-to-air TV channel Mega, distributed via streaming on Amazon Prime Video and HBO in different markets. The filmmaker María Elena Wood, executive producer of the series, describes a complex process that entailed various rewritings in both languages and transatlantic dialogues between Chilean and German creators. The series has been critically acclaimed on both sides of the ocean.¹²³

Despite the success of Chilean premium television, Wood underscores the fragility of the ecosystem. She particularly laments the complexity of the funding systems: the money is not available when it is needed, no banks will loan money to the audiovisual sector, and projects are not always profitable. "We risk a lot and sometimes we lose a lot, too," Wood says. The advertising work taken on by production companies often ends up paying off more with ambitious projects, such as feature films and series. Nonetheless, Wood is convinced that premium television will be essential to the future of audiovisual exports. "This is a product born to live in the world, and not just in Chile. It's conceived with the intention of having a broader reach, as its themes are of universal value."

This ambition of universality characterizes much of the Chilean audiovisual ecosystem, which has completed a first successful season of audiovisual exports. The world eagerly awaits the next season.

122 Isidora Cabezón, personal communication (January 13, 2021).

123 María Elena Wood, personal communication (February 2 and 8, 2021).



VENTURE CAPITAL FOR THE AUDIOVISUAL SECTOR

The audiovisual production boom in our region has created a need for new funding sources. Since public funds are insufficient to meet the demand for capital required by an increasing number of projects, and as many of these projects are commercial and not artistic in nature, the market has begun to react with new funding models that seek to compensate for a sector long neglected by banks and other traditional sources of credit.

Such is the case with the investment fund Screen Capital. Founded in 2018 by Tatiana Emden, Joyce Zylberberg and Edgar Spielmann, the company uses mixed funding models to support the entertainment industry. “The primary focus is audiovisual content from the region, in part carried out in Chile. Building local industry, but attracting more companies to the country,” Emden explains.

Their first fund, Screen One, is structured as a venture capital fund with funding from CORFO, which made a two-to-one loan with private capital. This model allows for investment returns to be strengthened in a one to three-year workflow, as opposed to other projects that can take up to a decade. “That’s how we established a nearly \$21 million USD fund, of which \$7 million USD are privately financed and \$14 million USD are publicly-leveraged financing on low-interest loans,” Emden says. However, convincing investors was no easy feat: “It’s a very risky industry because no product is exactly like the previous one,” she explains. In other words, they are intangible works that do not exist yet, and there are no parameters to evaluate creative projects. “The pitch we share with contributors and the committee is that we want to invest in a content portfolio, thereby lowering the investment risk, which is the major fear in this industry,” Emden says.¹²⁴

Given that it invests in early developmental phases, the fund allows for the protection of both intellectual property and, particularly, independent production companies. It also invests in a process to which few people pay enough attention: development. “Project development, which can begin with an idea, is worthwhile to us because it lets us connect

with younger talent. That’s where the freshest ideas come from, and we believe it’s a link in the chain that shouldn’t be neglected,” Zylberberg says.¹²⁵

Considering the number of audiovisual productions scheduled to premiere in Latin America and the Caribbean in the next two years, there are strikingly few fund administrators of this kind. Screen Capital, however, is not the only one in the region. VCS Capital, which has been operating in Mexico for the past few years, defines itself as Mexico’s first private capital investment fund focused on audiovisual projects. In the view of Marco Forte, one of its founders, there were “funding needs that traditional banking wasn’t attending to.” There, they saw their chance—in an industry that may be riskier but also more profitable. VCS Capital is interested in investing in projects at different stages—from those on the verge of distribution to those in the screenplay phase—but which are all undoubtedly disruptive. “Depending on the qualities of the project, we understand what is needed, what the risk level is, and we come up with a proposal in accordance with that,” Forte explains.¹²⁶

The region needs the creation of more investment funds for the Orange Economy—funds capable of attracting foreign capital and accelerating the growth of production companies and other enterprises in the creative industries. There is still a goal to accomplish across Latin American and the Caribbean: the creation of a regional fund that will narrow the gap in funding and management capacities needed to maximize the potential of the creative industries, particularly the growing audiovisual sector.

124 Tatiana Emden, personal communication (December 7, 2020).

125 Joyce Zylberberg, personal communication (December 7, 2020).

126 Marco Forte, personal communication (December 10, 2020).

LATIN AMERICA AND THE CARIBBEAN AT THE OSCAR AWARDS

ARGENTINA

This country has received an eclectic array of recognitions at the Oscars. Seven of its films have been nominated for Best Foreign Language Film since 1975; two ultimately won.

La tregua (Sergio Renán, 1974), based on the eponymous novel by Uruguayan writer Mario Benedetti, was the first Argentinian film to earn this distinction and the second in South America.

Camila (María Luisa Bemberg, 1984), a historical drama set in the 19th century, was the second to be nominated in this category.

As if demanding justice, *La historia oficial* (1985), by Luis Puenzo, took home the Oscar in 1986. It was also nominated for Best Original Screenplay.

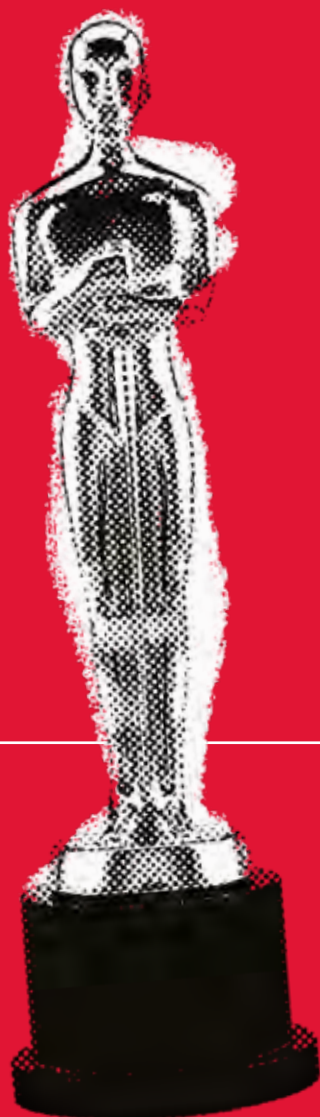
Tango, no me dejes nunca (1998), by Carlos Saura, and *El hijo de la novia* (2001), by Juan José Campanella, were the next films to be nominated in this category. In 2010, Campanella won Best Foreign Language Film for *El secreto de sus ojos* (2009). In 2015, the comedy *Relatos salvajes*, by Damián Szifron (2014), became the latest Argentinian film thus far to receive a Best Foreign Language Film nomination at the Oscars.

Argentina has also stood out for its composers, 10 of whom have been nominated in this category. The composer Lalo Schiffrin was nominated at least seven times (between 1968 and 1984), receiving an honorary Oscar in 2018. Luis Bacalov won an Oscar in recognition of his work on *Il Postino* (Michael Radford, 1994); Gustavo Santaolalla has won two, one for the score of *Brokeback Mountain* (Ang Lee, 2005) and another for *Babel* (Alejandro González Iñárritu, 2006).

Eugenio Zanetti has received two Oscar nominations for Best Production Design. In 1995, he won the award for the British-American historical drama *Restoration* (Michael Hoffman, 1995).

In the Best Visual Effects category, Pablo Helman has received three nominations (in 2003, 2006 and 2020) for *Star Wars: Episode II – Attack of the Clones* (George Lucas, 2002), *War of the Worlds* (Steven Spielberg, 2005) and *The Irishman* (Martin Scorsese, 2019).

In 2014, Armando Bó and Nicolás Giacobone won Best Original Screenplay for *Birdman* (2014), by the Mexican director Alejandro González Iñárritu.



LATIN AMERICA AND THE CARIBBEAN AT THE OSCAR AWARDS

BRAZIL

O Pagador de Promessas (Anselmo Duarte, 1962) became the first South American film to be nominated for Best Foreign Language Film in 1963.

At the 1996 Oscar Awards, *O Quatrilho* (Fábio Barreto, 1995) garnered the second nomination in Brazilian history for Best Foreign Language Film, followed by a productive spell: in 1998, the political drama *O Que é Isso, Companheiro?* (Bruno Barreto, 1997) obtained a nomination, followed one year later by *Central do Brasil* (Walter Salles, 1998), nominated in the same category. The latter film also received an Oscar nomination for its lead actress, Fernanda Montenegro.

Cidade de Deus (Fernando Meirelles and Kátia Lund, 2002), which delved into the favelas of Rio de Janeiro and explored their streets, became one of the most prominent Latin American films at the Oscars. In 2004, it was nominated for Best Cinematography, Best Editing, Best Adapted Screenplay, and Best Director.

In 2014, *The Salt of the Earth* (Win Wenders and Juliano Ribeiro Salgado, 2014), a Brazilian co-production, was also nominated for this category. Its most recent incursion into the Oscars was thanks to the political documentary *Democracia em vertigem* (Petra Costa, 2019), nominated for Best Documentary Feature in 2020.

CHILE

Chile has been nominated twice for Best Foreign Language Film, with *No* (Pablo Larraín, 2012) and *A Fantastic Woman* (Sebastián Lelio, 2017). The latter, which explores the days after the death of a trans woman's partner, won the award. In 2016, *Historia de un oso* (2014), directed by Gabriel Osorio and Patricio Escala, won Best Animated Short, a prize that put Chilean animation on the map.

The Chilean-American Claudio Miranda was nominated for Best Cinematography with *The Curious Case of Benjamin Button* (David Fincher, 2008). In 2013, he won the award for *Life of Pi* (Ang Lee, 2012).

At the 2021 Oscars, the docufiction *El agente topo* (Maite Alberdi, 2020) was nominated for Best Documentary Feature.

COLOMBIA

Catalina Sandino received a Best Actress nomination for her performance in *Maria Full of Grace* (Joshua Marston, 2004), considered Colombia's first entry into the Oscars. However, in 1996, the anthropologist and filmmaker Patricia Cardoso won a special award granted at the time: the gold medal in the student category for her short film *El reino de los cielos* (1996).¹²⁷

In 2008, the documentary short *La corona*, by Colombian-born director Isabel Vega and Amanda Micheli, was nominated in this category.¹²⁸

Embrace of the Serpent (Ciro Guerra, 2015) is seen as Colombia's major incursion into the Oscars, earning a nomination for Best Foreign Language Film in 2016.¹²⁹

¹²⁷ El Nuevo Siglo, "Los colombianos que han sonado en los Oscar" (January 26, 2020). <https://www.elnuevosiglo.com.co/articulos/01-2020-los-colombianos-que-han-sonado-en-los-oscar>

¹²⁸ El País, "La colombiana Isabel Vega opta al mejor corto documental en los Oscar," *Pantalla Colombia* N°. 756 (January 22, 2008). https://elpais.com/internacional/2008/01/23/actualidad/1201042803_850215.html

¹²⁹ Prolmágenes Colombia, "El abrazo de la serpiente, primera película colombiana nominada a los premios Oscar" (January 15, 2016). https://www.prolmagenescolombia.com/secciones/pantalla_colombia/breves_plantilla.php?id_noticia=7357

LATIN AMERICA AND THE CARIBBEAN AT THE OSCAR AWARDS

CUBA

Fresa y chocolate (Tomás Gutiérrez Alea and Juan Carlos Tabío, 1994) was the first and remains the only Cuban film to have been nominated for Best Foreign Language Film.

EL SALVADOR

In 1977, the Salvadoran director Andre Gutfreund shared with Peter Werner the prize for Best Short Film with *In the Region of Ice* (1976).

MEXICO

Mexico has received multiple Oscar nominations and awards. With *Roma* (Alfonso Cuarón, 2018), it broke two records with the nomination of actress Yalitza Aparicio—the first indigenous woman and the first of Mixtec origin to be nominated.¹³⁰ *Roma* also received ten nominations in categories such as Best Actress, Best Supporting Actress, Best Sound Editing/Mixing, and Best Production Design, and it was the first Latin American film to be nominated for Best Picture. In the end, it took home three awards: Best Cinematography, Best Director and Best Foreign Language Film.

Mexico has also distinguished itself in categories like Best Original Screenplay. Nearly five decades ago, Luis Buñuel was nominated for *The Discreet Charm of the Bourgeoisie* (1972). In 2001, Alfonso and Carlos Cuarón were nominated in the same category for *Y tu mamá también* (2001). At the 2007 Oscars, there were actually two nominees: Guillermo Arriaga for the screenplay of *Babel* (2006) and Guillermo del Toro for *Pan's Labyrinth* (2006), which he also directed. In 2015, Alejandro González Iñárritu won Best Original Screenplay for *Birdman* (2014). Guillermo del Toro was nominated for the screenplay and directing of *The Shape of Water* (2017), which won in the latter category.

Alfonso Cuarón has been one of the most prolific Oscar winners, with 11 nominations and five wins, including two for Best Director with *Gravity* (2013) and *Roma* (2019).

In the category of Best Foreign Language Film, Mexico has been nominated nine times: in 1961, for *Macario* (Roberto Gavaldón, 1960), and one year later for *Ánimas Trujano* (Ismael Rodríguez, 1961). Other nominees in this category have been *Tlayucan* (Luis Alcoriza, 1962), *Actas de Marusia* (directed by the Chilean filmmaker Miguel Littin, 1975), *Amores Perros* (Alejandro González Iñárritu, 2000), *El crimen del padre Amaro* (Carlos Carrera, 2002), *Pan's Labyrinth* (Guillermo del Toro, 2006), *Biutiful* (Alejandro González Iñárritu, 2010), and the aforementioned *Roma*, which took home the award.

This country has also stood out for its cinematographers: in 1965, Gabriel Figueroa won an Oscar in this category for *The Night of the Iguana* (John Huston, 1964). Cinematographer Emmanuel Lubezki has been nominated eight times, winning three Oscars. The second most nominated Mexican cinematographer is Rodrigo Prieto, with three nominations. Guillermo Navarro won the Oscar for Best Cinematography in 2007 with *Pan's Labyrinth*.

In Production Design, Eugenio Caballero won for *Pan's Labyrinth* in 2007.

Various Mexican actors and actresses have been nominated for starring and supporting roles. One special case is that of Anthony Quinn, who became the first Mexican and Latin American actor to win twice for Best Supporting Actor, with *¡Viva Zapata!* (Elia Kazan, 1952) and *Lust for Life* (Vincente Minnelli, 1956). Salma Hayek's nomination as Best Actress for *Frida* (Julie Taymor, 2002) is also noteworthy.

130 Helga Flores and Andrea Ortega, "El cine se lleva el Oscar al desarrollo," BID (n.d.), <https://www.iadb.org/es/mejorandovidas/el-cine-se-lleva-el-oscar-al-desarrollo>

LATIN AMERICA AND THE CARIBBEAN AT THE OSCAR AWARDS

NICARAGUA

In 1983, setting a precedent, Nicaragua earned a nomination for Best Foreign Language Film with *Alsino y el cóndor* (1982), directed by the Chilean filmmaker Miguel Littin.

PERU

La teta asustada (2009), by Claudia Llosa, became the first Peruvian film to receive a nomination for Best Foreign Language Film.





CHAPTER 2

NEW EMERGING CENTERS—NEW OPPORTUNITIES

With the recent and projected growth of the audiovisual industry in Latin America and the Caribbean, various countries and regions whose small size and population have historically hindered them from constructing a film industry have found new opportunities to participate in the current audiovisual boom.

Besides producing works that enrich the history of our cinema, several of these emerging centers are working toward situating themselves as competitive places for establishing film production services and audiovisual hubs. This is the case of Uruguay, the Dominican Republic and Panama, as well as cities like Mendoza in Argentina and Recife in Brazil.

Among the most attractive sectors for a developing audiovisual industry is that of production services, which offer technical, logistical and even legal support to foreigners seeking to film in a particular country through a local production company. The projects they support can certainly be ambitious feature films or series, but they can also be simpler productions: a segment of a documentary, a half-hour program, or even a commercial. Although the professionals responsible for production services do not play a part in the creative side of the project (which means plenty of filmmakers dismiss them), their growth poses an opportunity for professionalization in the countries and regions where the industry is emerging. Experts interviewed for this publication agree that experience in production services can be a launching pad for more technically and artistically sophisticated endeavors in the future.

Latin America offers major advantages for foreign producers: relatively low costs, proximity to the world's primary audiovisual market (the U.S.), compatible time zones with that country, and varied landscapes. But these attributes are insufficient; there's also a need for infrastructure, training and a legal framework capable of attracting investments.

As the stories in this section reveal, various emerging areas have made interesting progress in these aspects. Uruguay, the Dominican Republic and Panama, for example, have combined film laws with incentive programs to attract investments and cutting-edge infrastructure. Something similar is happening with Córdoba and Mendoza (Argentina), Recife (Brazil) and Guadalajara (Mexico), where regional production companies play an increasingly important role in an ecosystem that has historically concentrated in Buenos Aires, Bogotá and Rio de Janeiro/São Paulo.

Peru has also expanded its importance in the regional panorama: an increased number of movie theaters, combined with higher income per capita, have fostered the



growth of an industry now revealing its first surprises. The comedy *¡Asu Mare!*, premiered in 2013, had over three million viewers in Peru (one in every ten of the country's inhabitants), making it the most successful Peruvian film in history. Despite its humorous nuances and patently commercial nature, its social importance was clear to experts: the researcher Alberto Vergara described it in the *Harvard Review of Latin America* as "a metaphor for contemporary Peru."¹³¹ Given its growing supply of audiovisual services and promising market, both Movistar+ and Netflix have developed series and feature films for Peru. In 2019, Movistar+ premiered *Un día eres joven*, the first of its original productions made in Peru. Netflix plans to premiere the film *Mochileros* in 2021 and will also shoot a series about the soccer player Paolo Guerrero.¹³² In addition, the Peruvian production company Pacha Films oversaw the series *Maradona en Sinaloa* (2019).¹³³

As happens with major players, emerging audiovisual centers will still have to work to improve the distribution of the cinema they produce. According to Panamanian director Pituka Ortega, film festivals like that of Guadalajara have been very helpful in bringing Central American films to broader audiences.¹³⁴ The rise of streaming services also means a new distribution channel for films that would otherwise have struggled more to cross national borders.

¹³¹ Alberto Vergara, "Nostalgia, anhelo y anomia," *ReVista*. *Harvard Review of Latin American* (2014). <https://archive.revista.drclas.harvard.edu/book/nostalgia-anheloy-anomia>

¹³² RPP Noticias, "Netflix en Perú: Plataforma alista una serie sobre Paolo Guerrero y una cinta dirigida por Bruno Ascenzo" (February 20, 2020). <https://rpp.pe/tv/netflix/netflix-alista-serie-sobre-paolo-guerrero-y-una-cinta-dirigida-por-bruno-ascenzo-noticia-1246886>

¹³³ Peru.info, "Netflix estrena 'Maradona en Sinaloa', documental producido por la empresa peruana Pacha Films" (n.d.). <https://peru.info/es-pe/filminperu/noticias/det/netflix-estrena-maradona-en-sinaloa-documental-producido-por-la-empresa-peruana-pacha-films>

¹³⁴ Pituka Ortega, personal communication (November 17, 2020).

FROM THE BEACHES TO THE SCREEN: NOT CONTENT WITH OFFERING SERVICES, THE DOMINICAN REPUBLIC WANTS TO STRENGTHEN AN INDUSTRY

BECAUSE YOU WERE INTERESTED IN:

Dominican Republic, Film Law, incentives, national film, production services

A little more than a decade ago, the Dominican film industry barely existed. Once in a while, crews from Hollywood showed up to shoot on the streets of Santo Domingo or the beaches of Punta Cana. But major projects were scarce, and the local industry lay dormant in anticipation of a shoot that would inject resources and experience. There was not much national cinema, either: during the 20th and early 21st centuries, Dominican movie theaters projected almost exclusively foreign cinema, and local directors who aspired to make feature films found few creative outlets.

Some Dominicans, however, saw that nearby Puerto Rico had a buoyant audiovisual industry and wondered whether something similar could take root in their own country, which enjoys the same favorable weather, greater geographic diversity, and lower filming costs. In 2006, the Dominican Global Film Festival began, and it was then that certain industry stakeholders discussed the possibility of proposing a film law.¹³⁵

Eventually, it happened: in 2010, Law No. 108-10 for the Promotion of Cinematic Activity, better known as the *Ley de Cine* (Film Law), was approved. It involved one of the world's most generous incentives for production: Dominican filmmakers would have access to a 100% transferable tax credit for national films, and foreign filmmakers would enjoy a 25% credit for foreign productions budgeted at over \$500,000 USD. The effects were nearly immediate: movie theaters premiered between 10 and 28 national films per year. The Dominican film industry, which premiered 101 films between 1922 and 2009, created 169 films between 2011 and 2020.¹³⁶

¹³⁵ Yvette Marichal, personal communication (November 2, 2020).

¹³⁶ Dirección General de Cine República Dominicana, "Ley para el Fomento de la Actividad Cinematográfica en la República Dominicana N°. 108-10" (July 29, 2010). <http://cultura.gob.do/index.php/sobre-nosotros/marco-legal/category/13-leyes?download=7:ley-108-10-para-el-fomento-de-la-cinematografia>



“Why has it worked in the Dominican Republic and why have we grown so much? We have had the governmental freedom to allow it to happen, but the private sector is the most important part. That’s what funds the industry and what has devoted itself 100% to this Film Law. We have more investors every year, and that’s what has let us grow so much every year,” explains Yvette Marichal, the head of DG Cine at the time of this interview.

It is the private sector that funds the industry and has committed to the process

100%

Dominicans have embraced their national cinema more than any other country in the region: statistics from the Ibero-American Audiovisual Panorama indicate that Dominican cinema has a 26.4% market share (the equivalent is 15% in Brazil, 8.9% in Mexico and 3.4% in Colombia).¹³⁷ In 2017, the romantic comedy *Colao* was a greater box office success than *Fast and Furious 8*, which was the world’s second most viewed film that year.¹³⁸ In other words, Vin Diesel’s acrobatics attracted fewer viewers than the jokes of the Dominican cast led by Manny Pérez.

The Dominican film boom has been accompanied by important investment. The largest has been that of Pinewood Dominican Republic Studios, which, in 2014, inaugurated three sets and a water tank for film shoots, one of the most sophisticated in the world. According to Albert Martínez—CEO of Lantica, the company that manages the studios—the project involved an investment of approximately \$50 million USD, which included both Dominican and British capital. Martínez underscores that this investment was viable thanks to the certainty offered by the Film Law.

“Before, there was a foreign film of a certain size every four or five years.” That has now increased to “30 local films and some 10 foreign projects a year,” says the Spanish-born Martínez,¹³⁹ who has lived in the Dominican Republic since 2013. He remarks that Pinewood is considering the prospect of a fourth set in 2022, in response to the “enormous demand” for services. In recent months, this has included productions like *The I-Land* (Netflix) and *Old*, the latter directed by M. Night Shyamalan. Not only British and Hollywood capital have set their sights on the country: the production company Acun Medya, a Turkish

media conglomerate, has offices in the Dominican Republic, where projects are filmed for Turkish television, the most famous being *Survivor*.

However, there are still uncertainties on the horizon. The Dominican Republic understands that continued growth calls for overcoming considerable obstacles. The most important one may be how to generate enough talent to meet the demand for services. Taking the step toward offering post-production services is another major challenge. The Dominican producer and filmmaker Mila Ramírez informed us that while there are companies that offer animation services and visual effects for the local market, the international companies that shoot in the Dominican Republic are still reluctant to trust national post-production services.¹⁴⁰

Yvette Marichal states that the goal was always to build an industry: “Having a film law that fails to foment local industry doesn’t work. Then you simply become a country that offers services—not a truly flourishing industry.”

For this industry to grow, it is essential to keep educating, attracting investment and making good movies. No one said it would be easy, but if there is something in the air in the Dominican Republic, it is enthusiasm.

¹³⁷ Oscar Berrendo, Juan Antonio Serrano and Enrique Encinas. *Panorama Audiovisual Iberoamericano 2019* (Madrid: Egeda, 2019). <https://www.egeda.com/documentos/PanoramaAudiovisualIberoamericano2019/Panorama%20Audiovisual%20Iberoamericano%202019.pdf>

¹³⁸ Law 108-10, from 2010-2019, *Ley para el Fomento de la Actividad Cinematográfica en la República Dominicana*. Dirección General de Cine República Dominicana (July 29, 2010). <http://cultura.gob.do/index.php/sobre-nosotros/marco-legal/category/13-leyes?download=7:ley-108-10-para-el-fomento-de-la-cinematografia>

¹³⁹ Albert Martínez, personal communication (October 23, 2020).

CÓRDOBA AND MENDOZA WANT TO REMIND THE WORLD THAT THERE IS AN ARGENTINIAN AUDIOVISUAL INDUSTRY BEYOND BUENOS AIRES

BECAUSE YOU WERE INTERESTED IN:

Argentina, regional hubs, clusters, advertising, Córdoba, Mendoza, FilmAndes

There was a time when the Argentine province of Mendoza was a cowboy movie set: international investments were lured by the majestic landscapes and 300 days of sunlight per year. They built sets and filmed Westerns in the arid valleys. But the dream did not last long. In the 1970s, its film industry evaporated. The studios closed and the wine-making capital that dreamed of making movies moved on to other sectors. The film studios of Godoy Cruz, for example, became a soda-bottling factory.

Mendoza, however, never disappeared from the cinematic map. In the 1990s, the Mendoza Andes stood in for the Himalayas in *Seven Years in Tibet* (1997), a super-production that brought Brad Pitt and Jean-Jacques Annaud to the region. The film reminded the world that Argentina is not just pampas and cities but also mountains. Its filmed locations became tourist icons and broadcasted Mendoza's landscapes around the world.

Something similar is happening today: as an audiovisual industry develops beyond Buenos Aires, the distances between metropolis and province, city and mountain range, are shrinking.

The Argentinian audiovisual industry is growing in Córdoba, Patagonia, Misiones and Mendoza, where FilmAndes emerged. This cluster emerged with just six production companies and grew until it had accumulated several sectors related to the creative industries, inspired by the models of northern Italy, Catalonia and the Basque Country. It is one of the major undertakings of the Inter-American Development Bank, which, since 2018, has jointly executed a multi-million-dollar program that produces and shares strategic information through the Audiovisual Observatory, administers a mentorship system to improve content, and enables "international business rounds."¹⁴¹ When it received its first direct subsidy for nearly \$1 million USD, the ProMendoza Foundation announced, "There are no precedents in the entire history of the IADB for such extensive support to a development proposal of the Orange Economy."¹⁴²

¹⁴⁰ Mila Ramírez, personal communication (October 22, 2020).

¹⁴¹ FilmAndes.com, "Se realizó con éxito la Maratón para desarrolladores de Videojuegos" (n.d.). <https://filmandes.com/se-realizo-con-exito-la-maraton-para-desarrolladores-de-videojuegos/>

¹⁴² ProMendoza, "Lo que no sabías y lo que sorprende del clúster audiovisual de Mendoza" (May 16, 2019). <https://www.promendoza.com/es/lo-que-no-sabias-y-lo-que-sorprende-del-cluster-audiovisual-de-mendoza/>



FilmAndes aspires to create an “ecosystem of [audiovisual] relations” in the city, according to Marcelo Ortega, president of the organization. To date, it has already gathered over sixty members—from production to video game companies—that aim to use Mendoza’s strategic location as a connection point to Buenos Aires, to neighboring Santiago, the capital of Chile, to Córdoba, and even to Paraguay and Uruguay. Among its objectives, *FilmAndes* seeks to stimulate not only the film, television and advertising industries but also technologically relevant sectors like the video game industry.

The audiovisual industry was growing swiftly until the pandemic in 2020, which led to the suspension of ten international projects, Ortega says. Mendoza, however, was able to partially compensate for this deficit with advertising shoots, which are easier to control from a sanitary perspective. Between June 2020 and February 2021, over 135 million Argentine pesos were invoiced, generating slightly over 1,500 temporary jobs, according to Ortega.¹⁴³

The emergence of such initiatives, as well as of organizations like the Córdoba Association of Audiovisual Producers (APAC) or the Argentinian Audiovisual Corridor, points to an audiovisual resurgence beyond the capital. The northeastern province of Misiones, for example, went from two shoots per year in 2016 to eight in 2019.¹⁴⁴ In Córdoba, central Argentina, the ecosystem now amounts to 118 audiovisual production companies of all sizes, according to APAC information.¹⁴⁵ Although this region has historically been known for automotive assembly, the recent growth of the software industry has produced a favorable technological ecosystem for certain post-production services.

While statistics from the National Institute of Film and Audiovisual Arts (INCAA) indicate that Buenos Aires still concentrates 32% of the Argentinian audiovisual sector, the region with the second-largest audiovisual concentration is the center (Córdoba) with 20% of the country’s audiovisual companies.¹⁴⁶ Overall, the sector is eager to attract more investment and productions that will contribute both experience and professionalism.

However, the only way to grow is by increasing production volume. To do so, Ortega says, it is essential to consider four things: attracting investment through incentives, expanding installed technological capacity like studios, securing international relationships and developing local narratives. Ortega believes that legislating an incentive package that can compete with Uruguay or Colombia is the most urgent step to take, followed by training, which concerns both the public and the private sector.

“We’re part of a centralized country and the provinces are somewhat neglected,” Ortega remarked. The capital city concentrates population, economy and much of the audiovisual sector. “And that has to change.”

¹⁴³ Marcelo Ortega, personal communication (March 31, 2021).

¹⁴⁴ Joselo Schuap, Misiones Minister of Culture, APAC Colloquium.

¹⁴⁵ Asociación de Productores Audiovisuales de Córdoba [APAC], “Observatorio Audiovisual Córdoba” (n.d.). <http://www.asociacionapac.org/observatorio-audiovisual-cordoba/>

¹⁴⁶ Asociación de Productores Audiovisuales de Córdoba, “Observatorio Audiovisual Córdoba.” Ibid.

THE CASE OF URUGUAY: SUPPLY EXCEEDS DEMAND (AND OTHER ENVIABLE BUT PRESSING PROBLEMS)

BECAUSE YOU WERE INTERESTED IN:

Uruguay, investment, incentives, regional hubs, advertising

Overshadowed by its two formidable neighbors, Uruguay has sometimes had to make an effort to be noticed. Many people find it easy to overlook this small territory of cities, coastline and pampas that, with just 3.5 million inhabitants, is among the least populated countries in South America. Those familiar with its history and culture, however, know that it is full of surprises: today, Uruguay has one of the highest GDPs in Latin America (slightly over \$16,000 USD per inhabitant, according to the World Bank).¹⁴⁷ Proportionally, it is the region's greatest exporter of software. At the same time, Uruguay is among the most economically stable countries in the region. With diligence and an open spirit, it has attained social feats and public policy successes that exceed its modest geography.

The same could be said about its audiovisual industry, which has existed for over a century. For many years, it focused on advertising spots rather than feature films, but the sector has always harbored ambitions associated with larger countries—especially as of the mid-1990s, when it started premiering films at a quicker pace.

Particularly over the past 20 years, Uruguay has established itself as an attractive filming destination. Montevideo is so versatile that it even passed for Havana in the feature film *Miami Vice* (2006), as well as for North American and European cities in countless commercials. But it is thanks to Law No. 18.284 of 2008, or the Film Law, that this industry truly took off. After the establishment of the Fund for Film and Audiovisual Promotion, Uruguay shifted from premiering under a dozen films per year in 2004 to 20 films in 2018.¹⁴⁸

In hopes of continuing to develop its industry, the country endorsed the Uruguay Audiovisual Program (PUA, by its acronym in Spanish) in 2020, an incentive program that seeks to accelerate foreign audiovisual production. Starting with a fund of \$4 million USD per year,¹⁴⁹ it offers a cash rebate of between 10.6% and 25% for production expenses incurred in the country.¹⁵⁰ According to Jaime Miller—director of Uruguay XXI, the national export promotion agency—the arguments for doubling the fund, which had \$2 million USD in its first year, were persuasive: “For every incentive dollar, we can calculate a direct, indirect and induced economic impact of \$1.65.”¹⁵¹ One of the first projects to take advantage of the benefits was *Conquest*, a Netflix series produced by Keanu Reeves, which is scheduled to premiere in 2021. In April 2021, Amazon also announced that it arranged three major Amazon Originals shoots in the country, aimed at the Brazilian market.¹⁵²

147 Banco Mundial, “PIB per cápita (US\$ a precios actuales)-Uruguay” (n.d.). <https://datos.bancomundial.org/indicador/NY.GDP.PCAP.CD?locations=UY>

148 Óscar Berrendo, Juan Antonio Serrano and Enrique Encinas, *Panorama Audiovisual Iberoamericano 2019*, 39.

149 See uruguayaudiovisual.com/incentivos

150 See Reducto. Cash rebate PUA. Contenidos internacionales. <https://reducto.uy/es/uruguay/cash-rebate.html>

151 Jaime Miller and Roberto Blatt, personal communication (December 21, 2020).

152 Telemundo, “Por qué Uruguay resulta atractivo como mercado audiovisual para compañías como Amazon,” April 16, 2021. <https://www.teledoce.com/telemundo/cultura-y-espectaculos/por-que-uruguay-resulta-atractivo-como-mercado-audiovisual-para-companias-como-amazon/>

The cash rebate is not the only strategy for attracting international investment. Another relevant investment is the Maldonado Audiovisual Free Trade Zone, also known as Punta del Este Studios. With sets, offices and post-production studios, its initial investment will reach \$25 million USD.¹⁵³ The tax benefits of the free trade zone also extend to filming locations, which makes it possible to shoot outside the zone and still enjoy its advantages. Nicolás Aznárez, founding member of the project, remarks that Uruguay offers considerable benefits: high connectivity, privileged locations and a geographic position between two major markets experiencing a moment of instability. The project's capital is 60% Brazilian, and Aznárez calculates that 75% of the projected business will be with Brazil and Argentina. "For Uruguay to grow, it needs investment in infrastructure." That is what the studios promise: the right type of infrastructure¹⁵⁴ to successfully execute an international production.

With the incentive program, along with "good filming experiences" expressed by foreign companies, the government estimates that audiovisual exports could jump from \$20 million to \$40 million USD per year. The documentary filmmaker Roberto Blatt, director of the National Film and Audiovisual Institute, describes the audiovisual production pipeline for 2021 as "Very strong," but he emphasizes the need to "boost technical training quickly or we're headed for a bottleneck."

Some would say that a supply that exceeds the demand is an enviable problem. But training talent is no small matter. Uruguay's next challenge is to identify the profiles of the positions required and provide training on par with the major projects it hopes to attract. It is a sizable challenge indeed, even for a country that is used to taking the world by surprise.



URUGUAY'S NEXT CHALLENGE IS TO IDENTIFY THE PROFILES OF THE POSITIONS REQUIRED AND PROVIDE TRAINING ON PAR WITH THE MAJOR PROJECTS IT HOPES TO ATTRACT.

¹⁵³ Prensario Internacional, "Punta del Este Studios: el proyecto que posiciona a Uruguay en el mapa audiovisual global," (July 27, 2020). <https://www.prensario.net/29629-Punta-del-Este-Studios-el-proyecto-que-posiciona-a-Uruguay-en-el-mapa-audiovisual-global.note.aspx>

¹⁵⁴ Nicolás Aznárez, personal communication (January 5, 2021).

PERU, ECUADOR, BOLIVIA: THE ANDEAN REGION AS AN EMERGING AREA

BECAUSE YOU WERE INTERESTED IN:

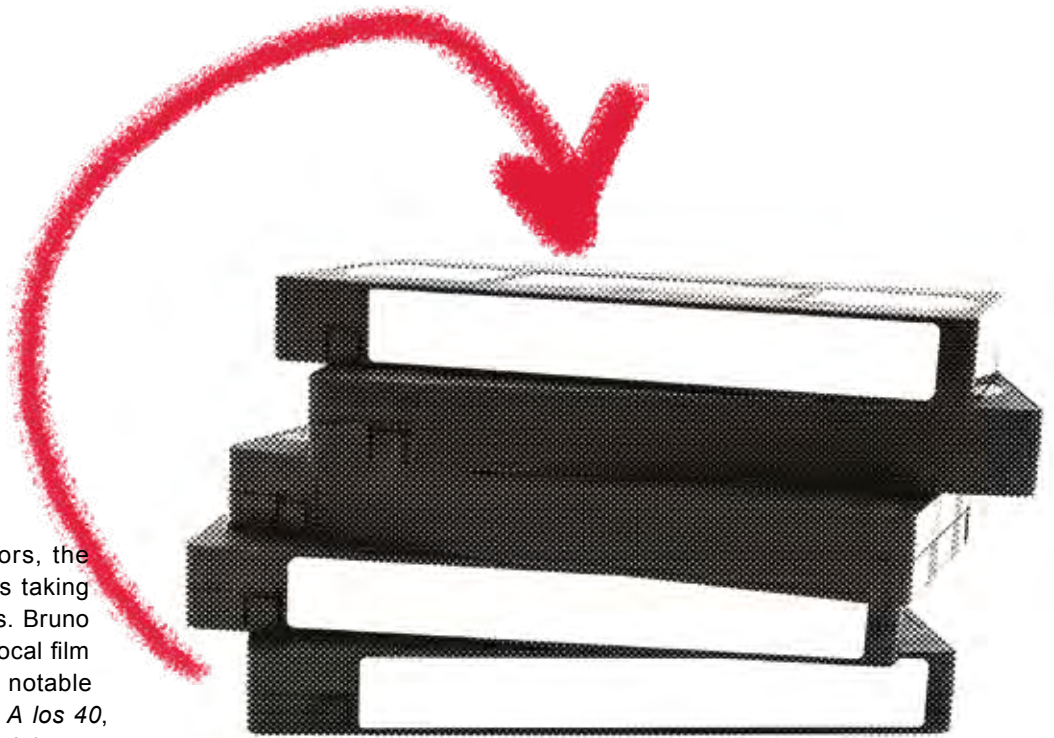
*Peru, Ecuador, Bolivia, emerging countries, new markets,
production services*

PERU

If there is anything Werner Herzog insists on in *Conquest of the Useless* (1982), the journal he kept while filming *Fitzcarraldo* in the Peruvian Amazon, besides the exuberant landscape, it is the discomfort of the shoot: the technical difficulties of transportation and filming were compounded by the scarcity of specialized technicians and workers, as well as a bureaucratic system more difficult to navigate than a jungle river. Forty years later, however, Peru is no longer an exotic and complex filming destination. In fact, it has become an emerging territory for filmmaking, promoting policies and attracting foreign productions with its extraordinary geography, its urban centers and services, and its growing consumer market.

A recent milestone in Peruvian film took place in 2010, when *La teta asustada* (2009), written and directed by Claudia Llosa, became Peru's first feature film to obtain a nomination for Best Foreign Language Film at the Oscars. Its cinematic ecosystem has been thriving ever since. Irrefutable proof can be found in the success of Tondero, the production company responsible for some of Peru's most popular projects, such as *Soltera codiciada* (2018), the trilogies *¡Asu Mare!* (2013, 2015 and 2018) and *Locos de amor* (2016, 2018, 2020).





Through some of its lead actors, the Peruvian audiovisual industry is taking the leap into streaming services. Bruno Ascenzo is a seminal figure in local film and television: in 2014, after a notable career as an actor, he directed *A los 40*, after which he has worked behind the camera as a director and screenwriter. Produced by Tondero,¹⁵⁵ Ascenzo will direct the first original Peruvian film for Netflix: *Mochileros*, set primarily in Cusco. He says that he always aspired to work in his home country: “When I finished university ten years ago, Peru was premiering between two and three films per year. Now, just before the outbreak of the pandemic, we were releasing nearly 40 films per year, which used to be unthinkable. We practically have to fight over release dates,” he recounts. Ascenzo sees regional cooperation as a vehicle for the sector’s growth, and he celebrates this new wave of audiovisual productions: “If this machine gets up and running, if many films are premiered, we’ll all have more opportunities to grow,” he says.

However, a fertile ecosystem does not come out of nowhere, and in the case of Peru, there has been an institutional struggle that had to be overcome: first, with a film law that met numerous legal obstacles until it was passed in December 2019, thus replacing the prior law of 1994. In a context in which national films accounted for 8.7% of spectators before the pandemic, the law spent years on hold for political reasons, sapping confidence from a sector that had shown signs of growth since 2013. “Film isn’t seen as a political priority, but it has been the subject of extensive political discussion,” explains Pierre Emile Vandoorne, the head, at the time of this interview, of the Directorate of Audiovisuals, Phonography and New Media of Peru (DAFO – its acronym in Spanish) and the Ibero-American Congress of Audiovisual and Film Authorities (CAACI – its acronym in Spanish), a regional body that formulates public policy to promote co-production. DAFO itself is a relatively new institution that has successfully crystallized “predict-

able” incentives, which in 2020 amounted to nearly 20.3 million Peruvian soles annually¹⁵⁶ of the public budget for the production, development and distribution of film, animation, video games and other creative industries. Among its most remarkable aspects is having attained a proportional level of access to incentives for filmmakers from Lima and those producing what is known as regional cinema. Before this funding existed, the genre was primarily self-managed and with a low-budget, albeit highly successful within the country. “The potential richness of national film is found in diversity. Among the topics that still require integral attention from the state, in my view, is Peru’s national memory and audiovisual heritage, which are still unprotected. There is no conservation policy or social appreciation for audiovisual material,” Vandoorne says, convinced that “people need to see cinema as something essential to their cultural identity.”¹⁵⁷

155 Bruno Ascenzo, personal communication (November 25, 2020).

156 Dirección del Audiovisual, la Fonografía y los Nuevos Medios, “Ministerio de Cultura declara ganadores a 179 proyectos cinematográficos y audiovisuales en Estímulos Económicos 2020” (October 17, 2020). <https://dafo.cultura.pe/ministerio-de-cultura-declara-ganadores-a-179-proyectos-cinematograficos-y-audiovisuales-en-estimulos-economicos-2020/>

157 Pierre Emile Vandoorne, personal communication (November 24, 2020).

ECUADOR

Mauricio Cadena, Ecuador's director of film dissemination, views a Hollywood super-production filmed in the country as the starting point for the sector's professionalization: *Proof of Life* (2000), an action film set in the fictional country of Tecala. This "meant that all the technicians in Ecuador were put to the test, and that's how the wheel started to turn: lots of people established production companies and took a huge leap toward what that kind of production entailed," Cadena recounts.¹⁵⁸

With respect to audiovisual development in an emergent nation, Cadena says: "Part of it advances through tax incentives, another part by making life easier for the production companies that come to shoot in Ecuador, where we have logistical havens as well as jungles, mountains and urban areas within an hour or two of each other." He does not believe that the country is in the early phases of developing its cinema: besides the preeminence of the documentary genre in festivals such as Encuentros del Otro Cine, he singles out the case of *Mortal Glitch*, an Ecuadorian action and fantasy series produced for YouTube Originals. (Its first episode has been viewed 27 million times thus far.¹⁵⁹) The production company behind this series, Touché Films, started off creating viral YouTube videos through the channel Enchufe.tv before taking the leap to film. One of the company founders, Jorge Ulloa, made his debut as a director of feature films with the Peruvian production *¡Asu mare! 3* in 2018, a valuable example of cooperation among regional talent.

The institutional restructuring around audiovisual activity has witnessed major changes in recent years: in 2016, with Ecuador's Organic Law of Culture, the National Film Council of Ecuador (CNCINE) was transformed into the Institute for Film and Audiovisual Creation (ICCA). In addition, in 2020, the Institute for Promoting Creativity and Innovation (IFCI) replaced both the latter and the previous Institute for Promoting the Arts, Innovation, and Creativity (IFAIC).

Daniela Moya, serving as undersecretary of Entrepreneurship, Arts and Innovation at Ecuador's Ministry of Culture and Heritage at the time of this interview, expressed that the goal of integrating these institutes was to envision a fund that would support the creative industries in different areas. The Ministry of Culture and Heritage created the Ecuador Creativo incentives program, which envisioned culture as a productive sector. As a result, the Registry of Cultural Stakeholders was created; it now has nearly 16,000 artists on record. Some of the program's most tangible benefits are tax-related, such as a 50% VAT reimbursement for productions in pre-production, development, and post-production stages.¹⁶⁰

BOLIVIA

Of all the Andean region, Bolivia may be making the slowest progress in developing its audiovisual industry. This is in spite of the fact that it welcomed the *Star Wars* saga, in 2016, the year in which the Salar de Uyuni became the planet Crait for *Episode VIII: The Last Jedi* (2017). Two years later, the Film and Audiovisual Art Law of Bolivia (2018) stipulated the creation of the Agency for the Development of Bolivian Film and Audiovisuals (ADECINE), which, like its Peruvian counterpart, had allocated funds in its 2020 call for "indigenous, autochthonous, rural, Afro-Bolivian, and community" film.¹⁶¹ However, in February 2021, the agency canceled the new calls for submissions to the Fund for Fomenting Film and Audiovisual Art due to underfinancing.¹⁶²

The Bolivian filmmaker Nina Wara sees the lack of funds as the primary obstacle for national cinema, which has also caused a dearth of experts: "There are two sound engineers in the whole country, no one specializes in post-production or color correction, there are very few cinematographers," she explains. "There are no resources, which means the sector isn't professionalized."¹⁶³ In addition, it is not easy to import equipment. As a result, and because making more than one or two films a year is not possible, audiovisual professionals often migrate to more promising markets.

Given the lack of policies to incentivize development in the sector, Bolivian talent is not being adequately harnessed. This is a constant that is worth changing. Perhaps, as Ascenzo says, the key lies in collaboration with neighboring countries. "We speak the same language, and I think we Latinos have very similar ways of interacting with each other. I do feel that we could become a powerhouse and produce, right here, work that will be seen in many other places." Familiarizing others with the industry, talent, and production capacities may be a first step toward changing perceptions of the Andean region as a planet in a galaxy far, far away.

¹⁵⁸ Mauricio Cadena, personal communication (November 27, 2020).

¹⁵⁹ Enchufe TV (September 2, 2020). *Mortal Glitch. Ep.1*. YouTube. <https://www.youtube.com/watch?v=yHM2JuYjDNO>

¹⁶⁰ Daniela Moya, personal communication (November 27, 2020).

¹⁶¹ See www.adecine.com

¹⁶² Cindy Soliz, "Adecine cancela convocatorias del fondo de fomento al cine nacional," *Los Tiempos* (March 5, 2021). <https://www.lostiempos.com/doble-click/cultural/20210305/adecine-cancela-convocatorias-del-fondo-fomento-al-cine-nacional>

¹⁶³ Nina Wara, personal communication (November 5, 2020).

PANAMA'S BOOM IS BEGINNING: **THE PANAMA** **INTERNATIONAL** **FILM FESTIVAL (IFF),** **A GATE TO NEW** **OPPORTUNITIES**

BECAUSE YOU WERE INTERESTED IN:

Panama, films made by women, film law, independent film, auteur cinema, film festivals

"Unhappy is the land that is in need of heroes": so begins, with these words by Bertolt Brecht, the documentary *Los puños de una nación*, directed by Panamanian filmmaker Pituka Ortega Heilbron. This moving profile of the boxer Roberto "Mano de Piedra" (hand of stone) Durán is also the portrait of a young nation—cut across by a canal that sutures two oceans and serves as a bridge between worlds—as well as a territory in dispute. Durán, born in one of the poorest neighborhoods in Panama and winner of five international boxing titles, became a beacon of hope for his compatriots, who, with their hands of stone and tender hearts, claimed an identity and their place in history.

Like Durán, who stood his ground through his triumphs and his defeats, Panamanian cinema, in Pituka's words, refuses to give up. Ortega grew up in Germany and the U.S., with a film buff mother who introduced her to classic American movies. But when she returned to her home country after studying history and political science, she found an arid cultural field—and decided to intervene

through cultural management. "I was writing short stories and directing a magazine called *Década*, a platform for photographers, writers, cartoonists, painters and graphic designers, in hopes of securing a space beyond advertising, which is where the needs of filmmaking were aired. One thing led to another and I ended up bringing together a group that wanted to start a film scene in Panama, focusing on self-representation through the moving image."

Panama, which has the highest GDP per capita in Central America, suffers from a certain insularity with respect to its neighboring countries, given the foreign presence in the canal zone and its recent history. "Much of a country's cultural development has to do with its identity, with what we contribute to humanity's project. Panama's mottos are 'Pro Mundi Beneficio' and 'Bridge of the World, Heart of the Universe,'" Pituka remarks. "My generation started to understand that Panama did have an identity and that we were citizens of a very special space."

The impact of the creative industries on its economy has been studied by the Inter-American Development Bank (IADB) as a multiplying element in all sectors, representing 3.3% of Panama's total production just ten years ago.¹⁶⁴ However, in the 1980s, the panorama was desolate; no one thought it was possible to develop a career in film. "There was no industry, market or audience," Ortega Heilbron explains. Far from discouraging her, she saw it as her chance to blaze a trail. "It was something that burned intensely inside me. In the early nineties, I was in Cuba for a screenwriting workshop with Gabriel García Márquez, and that was a great awakening; that experience changed everything for me. I started educating myself, getting to know Latin American film."

Ortega, who writes, directs, and produces all her own films, moves between different registers: from documentary research to fiction. Her movies tend to serve as windows onto everyday life in her country, like studies of the subjectivity of an individual and a nation. One of her first short films, *El mandado* (1997), is a family secret shot on 16mm, while her latest documentary, *La ruta* (2015), peers into both the transportation crisis and civil society as embodied by its elderly citizens, its workers, its ordinary people.

"Filmmaking in those days was like guerrilla warfare. You got things done however you could; there were no funds or film festivals," recalls Pituka, a member of the groups that advocated for the 2007 Film Law, that led to the creation of the Fund for National Film and Audiovisual Development. "I'd like to think that it inspired a younger generation who had studied more, gained more experience, and had the capacity to create clear structures," Pituka says. Today, the University of Panama and the University of the Isthmus have audiovisual training programs—an educational offering that, although still incipient, was nonexistent some years ago.

Given its cultural effervescence, it was only natural that Panama should have its own film festival. Inaugurated in 2011, the festival has been considered a showcase of Central American cinema ever since. Other significant changes on the governmental level include the separation of tasks related to national production, which correspond to the National Directorate of Film and Audiovisuals (Ministry of Culture), and tasks related to international production, which fall to the Panama Film Commission (Ministry of Commerce and Industry).¹⁶⁵

Pituka stresses that a solidarity-driven movement consolidated among Panamanian intellectuals, and that her current position heading the Panama International Film Festival (IFF) is the result of this collective effort. The

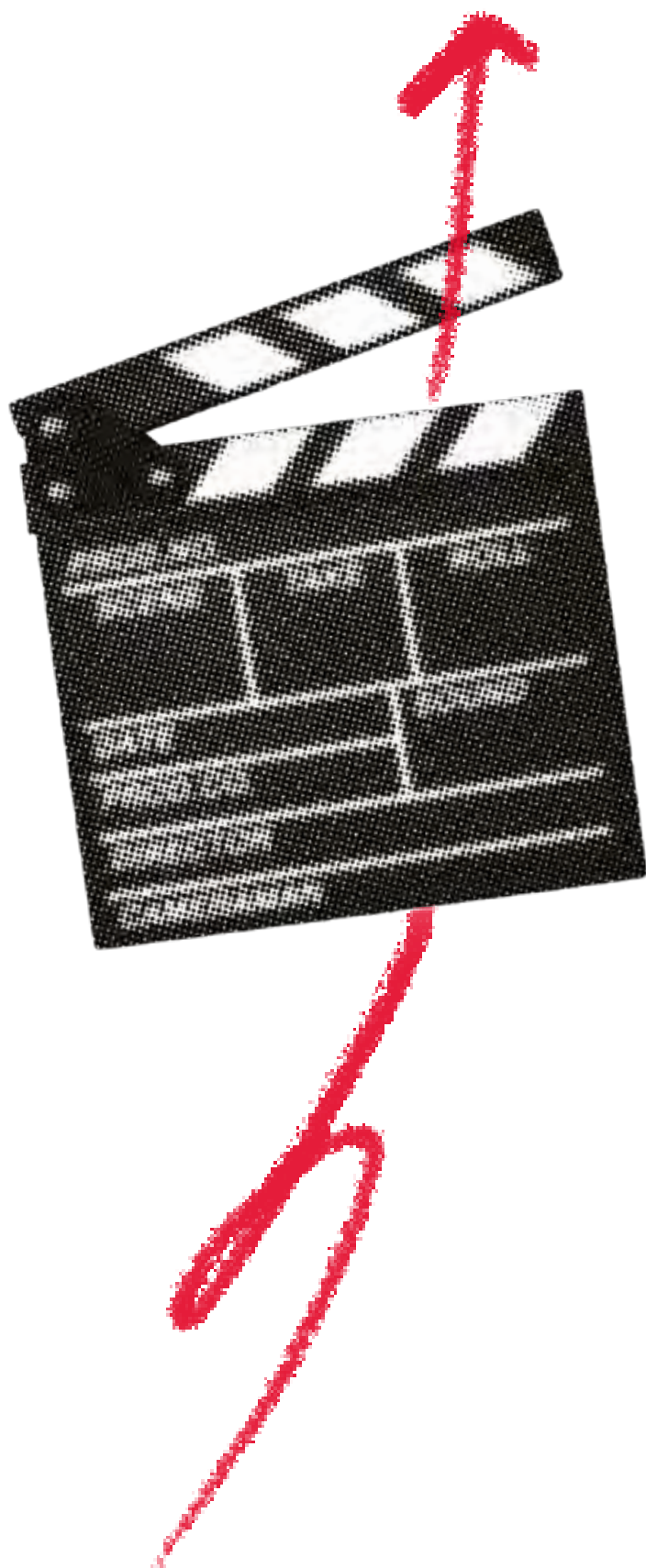
"OUR BOOM BEGINS... IN OUR REGION THERE IS A LOT OF TALENT AND WHAT WE DEMAND ABOVE ALL: THAT OUR CINEMA NOT ONLY BE SHOWN ON PLATFORMS OR LARGE FESTIVALS, BUT THAT IT IS STUDIED, DISCUSSED AND HAS ITS PLACE IN THE HISTORY OF WORLD CINEMATOGRAPHY, BECAUSE IT IS THE CINEMA OF THE FUTURE", SAYS PITUKA.

164 Guillermo Lagarda and Jennifer Linares (eds.), "Industrias creativas culturales en Panamá: diagnóstico del sector y relevancia económica." Banco Interamericano de Desarrollo (August 2017). <https://publications.iadb.org/publications/spanish/document/Industrias-creativas-culturales-en-Panam%C3%A1-Diagn%C3%B3stico-del-sector-y-relevancia-econ%C3%B3mica.pdf>

165 Jorge Cajar, "Comunicado GECU, traslado de DICINE al Ministerio de Cultura." Grupo Experimental de Cine Universitario (July 11, 2019). <https://www.gecupanama.com/single-post/2019/07/11/Comunicado-GECU-traslado-de-DICINE-al-Ministerio-de-Cultura>

166 Pituka Ortega, "Primera Mirada: fondo único para cineastas de Centroamérica y el Caribe," *Kreatópolis* (December 7, 2018). <https://blogs.iadb.org/industrias-creativas/es/1819/>

167 Fundación IFF Panamá, "Fundación IFF Panamá, BID LAB y Ministerio de Cultura anuncian segunda fase de actividad virtual Cinema Sanitas" (April 23, 2021). <https://iffpanama.org/es/fundacion-iff-panama-bid-lab-y-ministerio-de-cultura-anuncian-segunda-fase-de-actividad-virtual>



IFF Foundation Panama, which organizes the festival, has received essential support from the IADB since the creation of the Primera Mirada Fund in 2015, designed to stimulate Central American and Caribbean film.¹⁶⁶ During the most critical months of the pandemic in 2020, the Foundation forged an alliance with the IADB's innovation lab in order to launch the project Cinema Sanitas, which involved the virtual screening of films "with transformative power": a curated selection with a therapeutic approach, especially designed for the country's young students.¹⁶⁷ Thanks to this kind of support, the festival has been able to grow and establish itself as a cinematic reference point for Central America. Pituka explains that apart from carnivals, "the festival may be the cultural activity that has managed to raise the most state funds, surviving three different administrations," since it is not a political entity. She adds: "We have succeeded in consolidating ourselves as a valuable component of Panamanian identity. Panamanians enjoy going to the movies. There's a strong Hollywood presence here, and I, together with other colleagues, felt strongly that local filmmakers and young people should be nourished by another kind of cinema."

In Central America, audiovisual laws are undergoing updates, and their scope is broadening. While El Salvador's Orange Economy Law came into force in 2010, and Honduras's Film Law came into effect the year before, countries like Nicaragua have had a film law since 2010—although it has not translated into a fixed fund or crystallized any incentive programs for national and international production.

Paradigms have shifted, however. Not only did Nicaragua and Guatemala have some of the highest percentages of growth in movie theater attendance throughout Ibero-America in 2019 (17.3% and 14.8%, respectively);¹⁶⁸ their audiovisual production has also started to gain international prominence: the Nicaraguan film *La Yuma*, by Florence Jaugey, and *La Llorona*, by Guatemalan director Jayro Bustamante, have become favorites among critics and on the award circuit, captivating audiences on their journeys around top-tier film festivals.

"Our boom is beginning," Pituka says, convinced that audiences can expand as a result of transregional collaboration between established film festivals like those in Panama and Guadalajara, which help Latin American cinema travel. And, of course, the advantage of streaming platforms is that they expanded audiences, too. "There's an enormous amount of talent in our region, and what we need most is attention: we need our cinema not only to be screened on platforms and at major festivals, but also to be studied, discussed, and given its place in the history of global film, because it's the cinema of the future."¹⁶⁹

¹⁶⁸ Óscar Berrendo, Juan Antonio Serrano and Enrique Encinas. *Panorama Audiovisual Iberoamericano 2019*, 41.

¹⁶⁹ Pituka Ortega, personal communication (November 17, 2020).

AUDIOVISUAL CENTRAL AMERICA

EL SALVADOR

Current Institutional Overview The Sub-Directorate of Film and Audiovisuals, under the auspices of the Ministry of Culture, is the institution responsible for promoting cinema in El Salvador. A proposal to establish a national film law has existed for some time, one that would presuppose the opening of credit lines through a state bank and the creation of a trust comprising both public and private contributions.¹⁷⁰ However, it has not been enacted. In 2020, the country's anticipated incorporation into the Ibermedia program was announced.

In the Past In 1917, *Erupción del volcán de San Salvador* became the country's first feature film: it documented the catastrophe and was shown at Teatro Principal, the main theater. In 1930, Italian directors Virgilio Crisonino and Alberto Massi made the first full-length fiction feature in El Salvador: *Las águilas civilizadas*.¹⁷¹

At Present Early in the COVID-19 pandemic, the Sub-Directorate of Film and Audiovisuals distributed, through its YouTube channel, free of charge or registration, the Salvadoran documentaries *Circo* (Mauro Arévalo), *Acajutla: Historia de un puerto* (Mauro Arévalo), *Quimeras* (Edson Amaya), *Pieza de Indias* (Marvin Aguilar) and *Cuatro ojos de agua, memorias desde Cuisnahuat* (Roberto Kofman).¹⁷²

Salvadoran Viewers In 2019, movie theater attendance amounted to 4.2 million viewers, with a box office of \$17.2 million USD. The sole national release that year was *La batalla del volcán*, by Julio López, with 3,986 spectators.¹⁷³



170 Ricardo Roque y Carlos Escalón, *Cine and televisión. Análisis de situación de la expresión artística en El Salvador* (San Salvador: Fundación Accesarte, 2013), 65. <http://plataformadecultura.com/web/wp-content/uploads/2016/01/Cine-y-Televisi%C3%B3n.-An%C3%A1lisis-de-Situaci%C3%B3n-de-la-expresi%C3%B3n-art%C3%ADstica-en-El-Salvador.pdf>

171 Cinema 23. El Salvador, "El cine en El Salvador." Trayecto 23 (n.d.). <https://cinema23.com/blog/trayecto23/el-cine-en-el-salvador/>

172 Ministerio de Cultura de El Salvador, *Manual de organización y funciones de la Subdirección de Cine* (June 2020). <https://www.transparencia.gob.sv/institutions/ministerio-de-cultura/documents/382699/download>

173 Óscar Berrendo, Juan Antonio Serrano and Enrique Encinas, *Panorama Audiovisual Iberoamericano* 2019, 79 and 82.

AUDIOVISUAL CENTRAL AMERICA

HONDURAS

Current Institutional Overview The Film Directorate is part of the Ministry of Culture, Arts and Sports. In December 2019, the Film Law of Honduras was officially enacted, which includes the 40-million lempira Film Development Fund.¹⁷⁴

In the Past In 1937, during the administration of General Tiburcio Carías Andino, the film *Honduras* was shot with equipment brought from Mexico. It was directed by José Borh, filmed by cinematographer Raúl Martínez Solares and had an audience of 25,000 viewers.¹⁷⁵

At Present Although founded in Guatemala, the Honduran version of the Ícaro International Film Festival in Central America offers a week of screenings to represent Honduras at the international festival, in addition to training spaces and panel discussions¹⁷⁶ Its most important features in recent years—such as *El Xendra* (Juan Carlos Fanconi, 2012), *Amor y frijoles* (Mathew Kodath and Hernán Pereira, 2009), and the documentary *¿Quién dijo miedo? Honduras de un golpe* (Katia Lara, 2010)—have been screened and received awards at this festival.

Honduran Viewers In 2019, Honduran movie theater attendance amounted to 4.8 million spectators, with a box office of \$16.5 million USD. The two top-earning Honduran films were *Taxí VIP* (Joche Villanueva, 2019) and *Café con sabor a mi tierra* (Carlos Membreño, 2019) with 12,847 and 44,430 spectators, respectively.¹⁷⁷

GUATEMALA

Current Institutional Overview Everything related to promoting cinema is conducted by the Arts Directorate of the Ministry of Culture and Sports. Despite its attempts, in 2013 and 2016, to develop its own film law,¹⁷⁸ Guatemala still lacks a legal instrument of this kind; consequently, it does not have a film commission. The Casa Comal Film School, located in Guatemala City, is a leading institution in teaching, producing and disseminating national and Central American cinema.

In the Past In 1896, the country's first film screening was held at Pasaje Aycinena in Guatemala City. The first local sound film, *El sombrerón*, directed by Guillermo Andreu Corzo, was screened in 1949.¹⁷⁹

The Present In recent years, Guatemala has stood out with several award-winning films at international festivals. These include *Ixcánul* (2015), by Jayro Bustamante, winner of the Silver Bear at Berlin; and, by the same director, *La Llorona* (2019), which was on the pre-nomination list for the Oscars. Guatemala is also the birthplace of the Ícaro International Film Festival, founded in 1998 and organized by Casa Comal Art and Culture and its film school.¹⁸⁰

Guatemalan Spectators In 2019, movie theater attendance amounted to 7.2 million spectators, with a box office totaling \$34.1 million USD. The two top-earning films were *Serpiente emplumada* (Ricky López, 2019) and *Temblores* (Jayro Bustamante), each with over 7,000 spectators (2019).¹⁸¹

174 Decreto 3-2019. Ley de Cinematografía de Honduras (December 6, 2019). <https://www.tsc.gob.hn/web/leyes/Decreto-3-2019.pdf>

175 María Lourdes Cortés, "Historia del cine hondureño," *Ibermedia Digital* (August 2, 2015). <http://ibermediadigital.com/ibermedia-television/historia-del-cine-hondureno/>

176 A. Barahona, "Celebran Festival Ícaro edición 2020 de manera virtual," *El Pulso* (September 10, 2020). <https://elpulso.hn/2020/09/10/celebran-festival-icaro-edicion-2020-de-manera-virtual/>

177 Óscar Berrendo, Juan Antonio Serrano and Enrique Encinas *Panorama Audiovisual Iberoamericano* 2019, 93 and 96.

178 Vida Amor de Paz, "Urge la Ley de Cine en Guatemala," *Prensa Libre* (January 4, 2020). <https://www.prensalibre.com/opinion/columnasdiarias/urge-la-ley-de-cine-en-guatemala/>

179 Cinema 23. El Salvador, "El cine en El Salvador," *Trayecto* 23, (n.d.) <https://cinema23.com/blog/trayecto23/el-cine-en-el-salvador/>

180 See <http://escueladecinecasacomal.com/>

181 Óscar Berrendo, Juan Antonio Serrano and Enrique Encinas *Panorama Audiovisual Iberoamericano* 2019, 88 and 91.

182 Elmer Rivas, "El cine en Nicaragua es aún un sueño," *Niu* (January 7, 2017). <https://niu.com.ni/el-cine-en-nicaragua-es-aun-un-sueno/>

AUDIOVISUAL CENTRAL AMERICA

NICARAGUA

Current Institutional Overview Nicaragua's Film and Audiovisual Arts Law No. 723, passed in 2010, includes a fund for promoting domestic films and creating the National Film Council, but neither has been established in concrete terms.¹⁸² The country's official film institution is the National Film Archive of Nicaragua.

In the Past In 1899, the first Lumière-brand cinematograph arrived in Nicaragua; in 1900, the first film screening took place in the prestigious Castaño Theater in Managua.¹⁸³

The Present The Nicaraguan Film Institute existed in the 1980s, founded in 1979, which offered material and financial support to filmmakers. It was dismantled in the 1990s.¹⁸⁴

Nicaraguan Viewers In 2019, movie theater attendance amounted to 1.7 million viewers, with a total box office of \$6.7 million USD. No national films were premiered that year.¹⁸⁵

COSTA RICA

Current Institutional Overview The Costa Rican Film Production Center, also called the Film Center (Centro de Cine), pertaining to the Ministry of Culture and Youth, is the institution responsible for promoting audiovisual activity in the country. Law No. 6.158 stipulated the creation of the Film Center in 1977, but it did not establish promotional funds or tax incentives (although the Fund for Audiovisual and Film Promotion, also known as "El Fauno," has existed since 2014).¹⁸⁶ Efforts have been made to create an updated film law through Bill 20.661, which remains under discussion.

In the Past The cinematograph arrived early in Costa Rica, in 1897, with a premiere at the Variedades Theater. In 1950, Álvaro Chavarría created the first news broadcast with sound: *Reportaje gráfico nacional*.¹⁸⁷

At Present As of 2015, the Costa Rica International Film Festival has consolidated, focusing on auteur films and different sections with their corresponding awards.¹⁸⁸

Costa Rican Spectators In 2019, movie theater attendance amounted to 8.1 million viewers, with a total box office of \$41.7 million USD. The three top-earning Costa Rican films were *Maikol Jordan 2*, by Daniel Moreno (85,136 spectators); *Aquí y ahora*, by James Ponsoldt (22,652 spectators), and *El despertar de las hormigas*, by Antonella Sudasassi (2,990 spectators).¹⁸⁹

¹⁸³ Stephany Cuadra, "Historia del Cine en Nicaragua," *ViaNica.com* (August, 2016). <https://vianica.com/sp/go/specials/34-historia-del-cine-en-nicaragua.html>

¹⁸⁴ María Denisse Villalta, "Realización del documental *Del cine al video*. Realidad del cine nicaragüense" [BA thesis, Universidad Centroamericana, Nicaragua] (December, 2013). <http://repositorio.uca.edu.ni/1494/1/UCANI3761.pdf>

¹⁸⁵ Óscar Berrendo, Juan Antonio Serrano and Enrique Encinas. *Panorama Audiovisual Iberoamericano 2019*, 102.

¹⁸⁶ See <https://www.centrodecine.go.cr/direccion/centro-costarricense-produccion-cinematografica>

¹⁸⁷ Referenced in Ibermedia Digital, "Historia del cine costarricense" (August 2, 2015). <http://ibermediadigital.com/ibermedia-television/contexto-historico/historia-del-cine-costarricense>

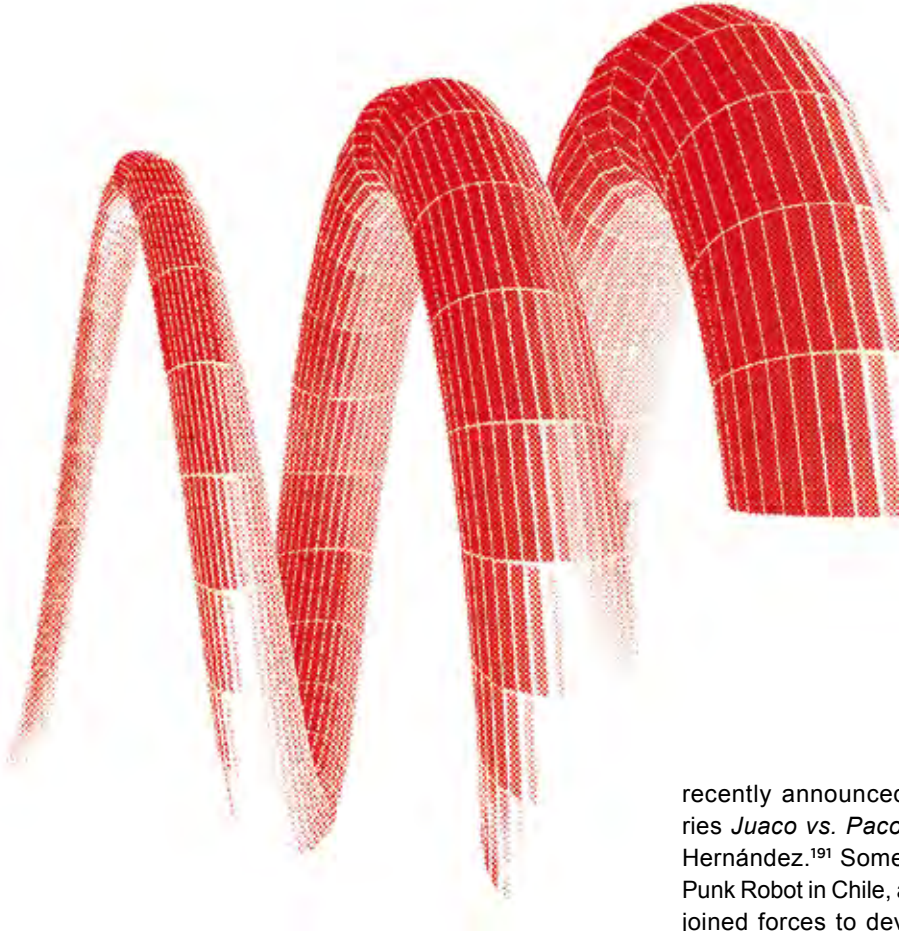
¹⁸⁸ See www.costaricacinefest.go.cr

¹⁸⁹ Óscar Berrendo, Juan Antonio Serrano and Enrique Encinas. *Panorama Audiovisual Iberoamericano 2019*, 96 and 72.

ANIMATION IS NOT CHILD'S PLAY, BUT AN INDUSTRY WITH VAST POTENTIAL: A TOUR THROUGH MEXICO, BRAZIL AND PERU

BECAUSE YOU WERE INTERESTED IN:

animation, digital skills, Peru, Brazil, Trinidad and Tobago, Guadalajara, intellectual property, production services



Animation has a venerable tradition in our part of the world. In 1917, the Argentinian cartoonist Quirino Cristiani produced, in Buenos Aires, the first animated feature in history: *El apóstol*, which was censored for its political overtones. Although Cristiani had outstripped Walt Disney's Mickey Mouse by nearly a decade, his work was stifled by the politicians of those years, who were unable to see what they had before them: a potential industry.

A century later, we cannot afford to miss that boat again. "In some countries, animation is still seen as something for little kids to watch after school," says Aída del Solar, a Peruvian animator who lives in Europe and teaches at the prestigious French animation school Gobelins. By contrast, she views animation as a nearly hypnotic medium, one that synthesizes image and voice: "it is a document that's attainable when others are absent."¹⁹⁰

The animation industry in Latin America and the Caribbean, focused until recently on offering production services for international content, is now more energetically developing intellectual property that travels the world.

Among the most noteworthy examples is *Metegol* (2013), a 3D animation directed by the Argentinian filmmaker Juan José Campanella and based on a story by the writer Roberto Fontanarrosa. It won the Goya for Best Animation in 2014 and became a global hit. For its part, the Mexican studio ÁNiMA has had various successes since it was founded in 2002: its feature-length debut, *Magos y gigantes* (2003) was followed by a constellation of film and television projects. Outstanding examples include *Ana y Bruno* (2017) and its film saga *Las leyendas*, which later became the first animated Netflix series to be produced in Latin America. Today, animations such as *Irmão de Jorel* (Copa Studios) are broadcasted on the Cartoon Network; this same chain

recently announced the premiere of the Colombian series *Juaco vs. Paco*, created by Mónica Rocha and John Hernández.¹⁹¹ Some leading studios—like Hype in Brazil, Punk Robot in Chile, and Red Animation Studio in Peru—have joined forces to develop a shared production pipeline,¹⁹² yielding a special effervescence that transcends borders.

After the first edition of the Brazilian animation festival Anima Mundi in 1993, our region has seen the growth of festivals, markets, and events where animators of all career paths can meet and network. These include Pixelatl in Mexico, the Quirino Ibero-American Animation in Spain, and the Chilemonos Festival in Chile, an Oscar-qualifying festival—which means that the short films that win Best International Short and Best Latin American Short can apply for official Academy Awards classification.¹⁹³

¹⁹⁰ Aída del Solar, personal communication (March 3, 2021).

¹⁹¹ Beatrice, "Juaco vs. Paco: serie animada colombiana que se estrenará en Cartoon Network," *Cafetoons* (July 17, 2020). <https://cafetoons.net/juaco-paco-serie-animada-colombiana-cartoon-network/>

¹⁹² Katherine Sanderson, "The South American Animation Industry: How Brazil, Chile, and Peru Are Proving Their Talent is Real," *Animation Ave* (July 1, 2020). <https://www.animationave.com/international/south-america-animation-chile-brazil-peru>

¹⁹³ Ministerio de las Culturas, las Artes y el Patrimonio, "Festival Chilemonos se convierte en calificador para los Oscar" (November 23, 2018). <https://www.cultura.gob.cl/actualidad/festival-chilemonos-se-convierte-en-calificador-para-los-oscar/>

In other words, the animation industry is an engine of growth in Latin America, with a global market, shared with visual effects, of \$156 billion USD in 2020.¹⁹⁴ Many agree that 2016 marked a watershed: the Chilean film *Historia de un oso* (2014), directed by Gabriel Osorio Vargas, won the Oscar for Best Animated Short and forced the world to pay more attention to animation in Latin America and the Caribbean. Since then, the industry has continued to show signs of striking dynamism. In 2017, for example, of the twenty most-viewed films in Colombia, eight were animated;¹⁹⁵ meanwhile, in Argentina, the animation section of the Ventana Sur Festival was established as one of the sector's most important rallying points.¹⁹⁶ In Brazil, Law No. 12.485, of 2011, incentivized the creation of animation studios to meet the demand for local children's content via quotas that required the broadcast of Brazilian content on pay television. In Mexico, animation is the audiovisual educational sector with the greatest output: at least 139 educational programs specialize in animation in the country.¹⁹⁷

Interest in and demand for animation is growing. But what sort of panorama exists in the region? And how are animators experiencing the present moment?

THE CHALLENGES OF PRODUCING AN ANIMATED STORY

In Rio de Janeiro, Marcelo Pereira is the executive director and a founding member of Combo Studio, which produced *Super Drags* (2018), the first animated Latin American series for adults to be premiered on Netflix, which also includes LGBTQ+ themes. Yet, it was not this miniseries that put Combo on the map; it was *Any Malu*, an animated series starring a girl who makes YouTube videos. The series went from being a highly popular free YouTube channel to a Cartoon Network series. *Any Malu* is now an important patented asset for Combo, but it emerged as an idea to promote the studio and showcase its technical capacities—an original marketing strategy. However, according to Pereira, the studio first had to fund

PEREIRA RECOUNTS THAT ONE OF THE BIGGEST CHALLENGES TO PRODUCING AN ANIMATED SERIES FOR NETFLIX IN BRAZIL WAS NOT FINDING ANIMATORS, BUT STORYBOARD ARTISTS AND SCREENWRITERS SPECIALIZED IN ANIMATION.

three years of *Any Malu* episodes. The gamble paid off, and it gave Combo Studio the chance to make a pitch to Netflix, which opened its doors to produce five episodes of *Super Drags*.

Pereira recounts that one of the biggest challenges to producing an animated series for Netflix in Brazil was not finding animators, but storyboard artists and screenwriters specialized in animation. "Animation is growing in the country; we can't complain. There are more animators and animation studios every day, but it's hard to find technical talent. There is work, but it's a very young market. The most experienced animator in Brazil might be a guy who started out 30 years ago, when animation was still done on paper, and had no experience with international animation."¹⁹⁸ Still, he believes that the flexibility and adaptability of Brazilian animators are points in their favor.

In the view of Aída del Solar—who has mentored several generations of Latin American animators, especially from the Andean region, through numerous private and governmental initiatives like the Animation Workshop and Gobelins l'École de l'Image—education is key in this area. "In Peru, I can see there is ambition, enthusiasm, and lots of beautiful images, but the technique needs to be strengthened a bit more." Del Solar has hope in residency projects for animators, like the Animation Workshop, which has yielded projects like the short film *Abuela grillo* (2009), which brought together a strong team of animators from Bolivia. Teamwork, mentorship, and transregional projects are the elements that complement this education, according to Del Solar.

194 Business Wire, "Latin American Animation, VFX & Video Games: Strategies, Trends & Opportunities, Report 2021-25" (January 18, 2021). <https://www.businesswire.com/news/home/20210118005309/en/Latin-American-Animation-VFX-Video-Games-Market-Strategies-Trends-Opportunities-Report-2021-2025---ResearchAndMarkets.com>

195 Anuario Estadístico de Cine Colombiano 2017, Dirección de Cinematografía del Ministerio de Cultura. <https://www.economianaranja.gov.co/media/pfuozv4v/anuario-estadistico-cine-colombiano-2017.pdf>

196 Anuario INCAA 2018. Instituto Nacional de Cine y Artes Audiovisuales. Ministerio de Cultura. Argentina. <http://www.incaa.gov.ar/anuarios>

197 Anuario Estadístico de Cine Mexicano 2019. IMCINE (Instituto Mexicano de Cinematografía), Secretaría de Cultura. <http://www.imcine.gob.mx/cine-mexicano/anuario-estadistico/>

198 Marcelo Pereira, personal communication (November 3, 2020).

NEW ANIMATION CENTERS

Certain places are defining themselves as animation hubs in the region, such as Guadalajara, the capital of Jalisco State, Mexico. Many have described this city as a cultural epicenter—it serves as headquarters to the largest book fair in Spanish-speaking Latin America, as well as an important film festival. But it is also a kind of Silicon Valley, with many companies involved in digital activity and information technologies. The latter are “natural allies” to animation, according to Angélica Lares, director of the International Animation Center, known as El Taller del Chucho.¹⁹⁹

This initiative, founded in Guadalajara and instituted by Guillermo del Toro, seeks to make use of the local talent pipeline to offer different animation services. The studio is currently developing stop motion for the super-production *Pinocchio*, directed by Del Toro and scheduled to premiere in 2021. Lares believes that El Taller del Chucho is well positioned to be nurtured by a rich artistic tradition, one that includes the vast reserve of painters and animators from Jalisco, as well as the present generations of artists. She hopes that the center will serve as a space to develop projects with the rest of Latin America and the Caribbean.

Among the animation centers on the rise, one of the most surprising is taking shape in the Caribbean archipelago of Trinidad and Tobago, where the University of Trinidad and Tobago already offers a degree in digital media with an optional concentration in animation—a possibility that speaks to the demand for technical training. The country participates in the Animae Caribe Festival, the largest animation event in the region. Likewise, over the past few years, an ecosystem of animation studios has been forming on the islands, promoting legal frameworks and creating networks, many of which are members of the Trinidad & Tobago Animation Network.

The proliferation of animation studios aiming for the big leagues, not to mention an educational ecosystem seeking to meet the demand, undoubtedly sketch out a promising horizon. However, we cannot forget that the ability to organize and forge transregional alliances could be decisive, “I think there’s enough talent and competitiveness for another coup, like when Chile won the Oscar for *Historia de un oso*. Unfortunately, it depends on ordinary people and independent producers like us, more than on public policy or a long-term vision invested in emerging industries and technologies,” says Luis Patricio Salmón, co-founder of Mighty Animation, with respect to the Mexican context.²⁰⁰

Our region faces challenges that go beyond its capacity to animate possible worlds. Even so, there is palpable optimism that the industry is already well placed to bear fruit.

199 Angélica Lares, personal communication (March 8, 2021).

200 Luis Patricio Salmón, personal communication (November 4, 2020).



PARAGUAYAN CINEMA TAKES OFF

No one ever imagined that a film in Guaraní would travel the world and accelerate the film industry in Paraguay, but it happened: *Hamaca paraguaya* (2006), directed by Paz Encina, set in 1935 during the Chaco War between Paraguay and Bolivia, was selected at Cannes, where it won the FIPRESCI award in the 'Un Certain Regard' selection, as well as other awards at Rotterdam, Miami and Granada.

Gabriela Sabaté, the producer of *Hamaca paraguaya*—who later produced the thriller *Matar a un muerto* (2019), directed by Hugo Giménez—recalls how she discovered her passion in a school cinema club, led by Juan Carlos Maneglia. Maneglia is the director of another successful Paraguayan film, hailed by both critics and audiences: *7 cajas* (2012), nominated at the Goya Awards for Best Spanish-Language Film—even though it is spoken in Yopará, a mixture of Spanish and Guaraní.

These opportunities have professionalized the Paraguayan ecosystem, which has received directors such as Lucía Puenzo, Pablo Giorgelli and Lucrecia Martel to film there. And they have made it possible to reaffirm an audiovisual commitment: *Alas de gloria* (Joaquín Serrano) will be the first locally animated film. A moving teaser has already been released, developed with support from the National Fund for Culture and the Arts of Paraguay and the Creative Bonds²⁰¹ provided by the Inter-American Development Bank Innovation Lab (BID Lab) as part of the project entitled Promoting the Creative Economy in Paraguay.²⁰² The film, which

is currently seeking funds and producers, is also set during the Chaco War, which witnessed the continent's first aerial battle, according to its producers; it seeks to settle accounts with a tragic episode in its aviation history.

Since 2018, Paraguay has had a film law, No. 6106/2018 of Audiovisual Promotion, which stipulated the functions of the National Audiovisual Institute of Paraguay (INAP) and the National Audiovisual Council.²⁰³ In addition, it determined that the National Audiovisual Fund would be financed as follows:

1. "Special budget allocations;"
2. "Earnings obtained by the National Audiovisual Institute of Paraguay for the provision of services derived from the exercise of [its] functions;
3. "National and international contributions, credits, allowances, bequests and donations;"
4. "50% of the budget allocations that pertain to withholding taxes derived from commercial operations via the internet pertaining to foreign audiovisual services obtained via the internet" (or OTT services). These are unprecedented steps in the region—and in a country with a creative economy that represents 2.5% of the GDP and employs over 50,000 people, according to statistics from the Paraguayan Federation of Creative Industries."²⁰⁴ With recently premiered films such as *Los buscadores* (Juan Carlos Maneglia, 2017) and *Las herederas* (Alfredo Martinessi, 2018), Paraguay has taken massive steps toward strengthening its audiovisual identity. The rest of Latin America and the Caribbean is watching attentively.

201 La Nación, "Alas de gloria llegará a cines en el año 2021" (May 9, 2019). https://www.lanacion.com.py/espectaculo_edicionimpresa/2019/05/09/alas-de-gloria-llegara-a-cines-en-el-ano-2021/

202 Laura Bomrad, "¡Gracias por ser parte de la fuerza creativa!" (November 2020). <https://www.cird.org.py/econaranja/>

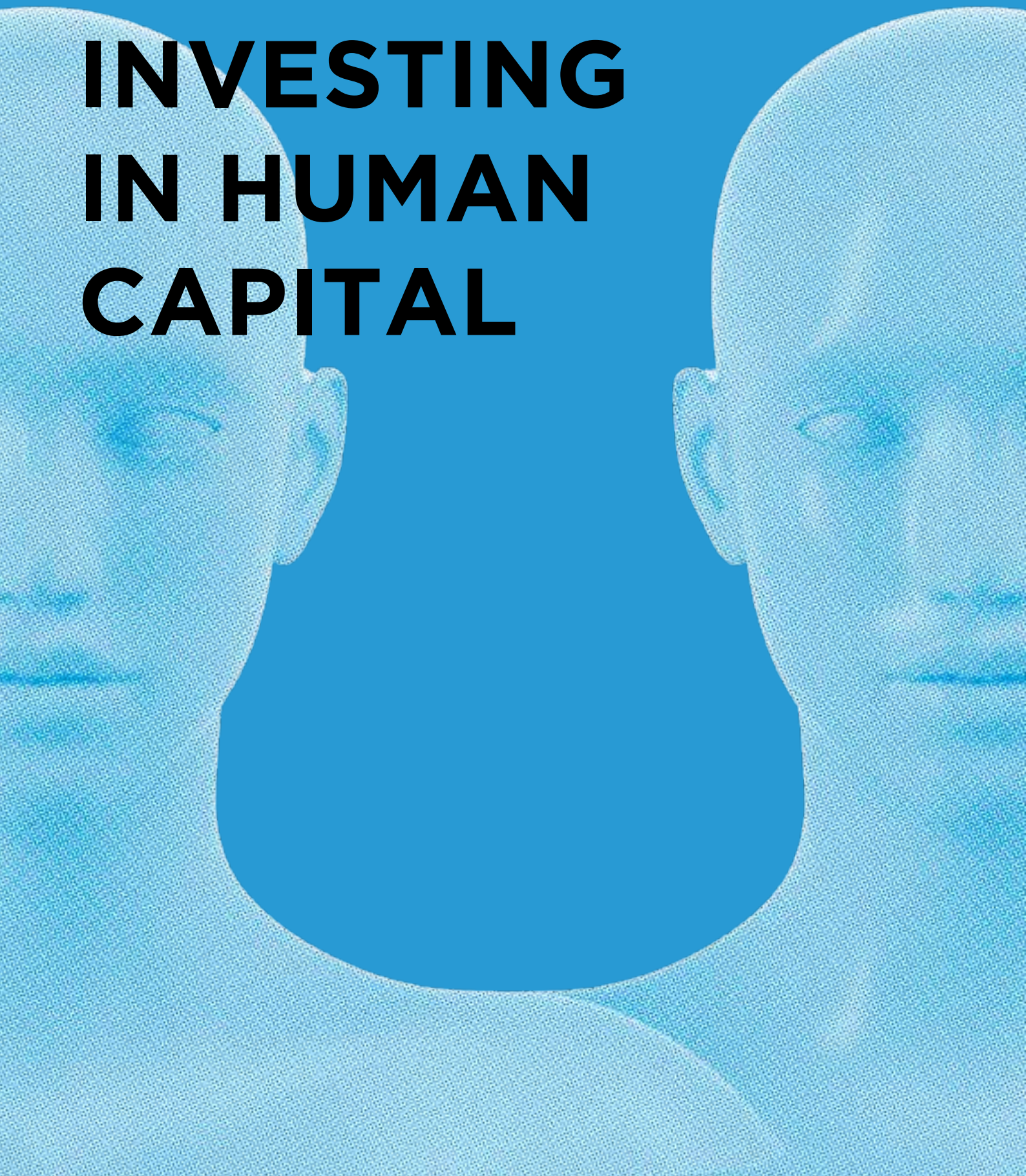
203 Conferencia de Autoridades Audiovisuales y Cinematográficas de Iberoamérica (CAACI), "Paraguay establece la estructura orgánica de su Instituto Nacional del Audiovisual" (s.f.). <https://caaci-iberoamerica.org/paraguay-establece-la-estructura-organica-de-su-instituto-nacional-del-audiovisual/>

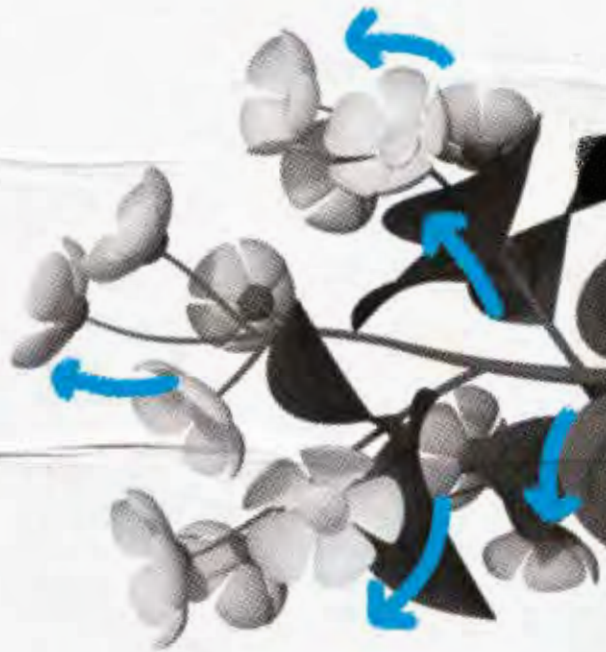
204 Agencia Informativa Paraguaya, "Sector creativo del Paraguay impacta 2.5% en el PIB y genera 50.000 empleos anuales" (August 31, 2019). <https://www.ip.gov.py/ip/sector-creativo-del-paraguay-impacta-2-5-en-el-pib-y-genera-50-000-empleos-anuales/>

PART II

A COMMON
PRIORITY:

**INVESTING
IN HUMAN
CAPITAL**





CHAPTER 3

WORKFORCE SKILLS WITHIN AUDIOVISUAL PRODUCTION IN LATIN AMERICA AND THE CARIBBEAN

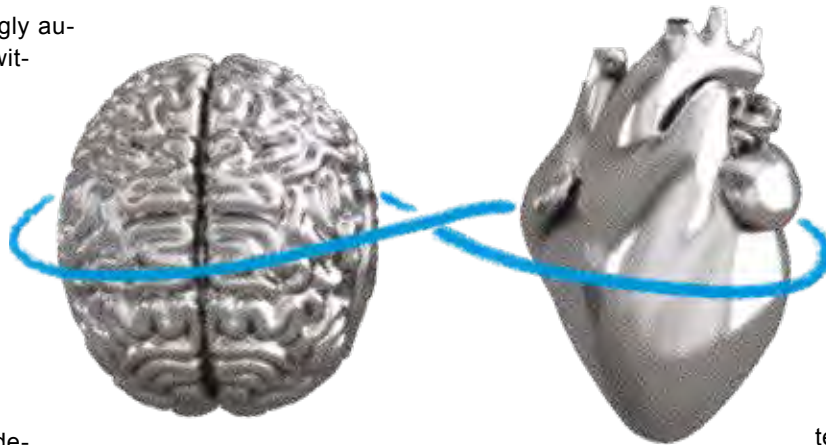
CRITICAL THINKING, PERSEVERANCE AND CURIOSITY

HUMAN SKILLS ARE MORE IMPORTANT THAN EVER IN THIS AGE OF AUTOMATION

A DIFFERENT REALITY

We live in an increasingly automated world, as we witness the disappearance or transformation of traditional jobs due to the arrival of machines, computers and robots, which are increasingly replacing humans in the execution of routine tasks for which they are undoubtedly better suited. The long-delayed future is finally here. This acceleration of digitalization does not affect only basic tasks; in fact, the exponential growth of sophisticated technology has achieved much more complexity: self-driving vehicles, robots that carry out complex medical surgeries, and the development of cryptocurrencies are only a few examples of these processes of transformation.

Computers can accumulate and process large volumes of information, follow instructions and resolve infinite equations, and perhaps they have an advantage when it comes to specialized, repetitive and predictable



work. However, there are skills which are much more difficult for them to develop—those skills that make us human. A computer is not capable of exchanging a knowing glance, compassion, or empathy. No robot can spontaneously generate creativity, determination, and the way in which we react to joy and pain. Men and women, when faced with unpredictable situations in which they must use their emotions to deal with a problem, or generate new ideas and relationships between elements that were previously unconnected, set themselves apart from machines that are automated, and enter the terrain of robot-proof tasks, almost impossible to replace by machines. Since many components of the audiovisual sector require these human skills, they can be part of an intelligent strategy to protect and develop the jobs for a future that has already arrived.

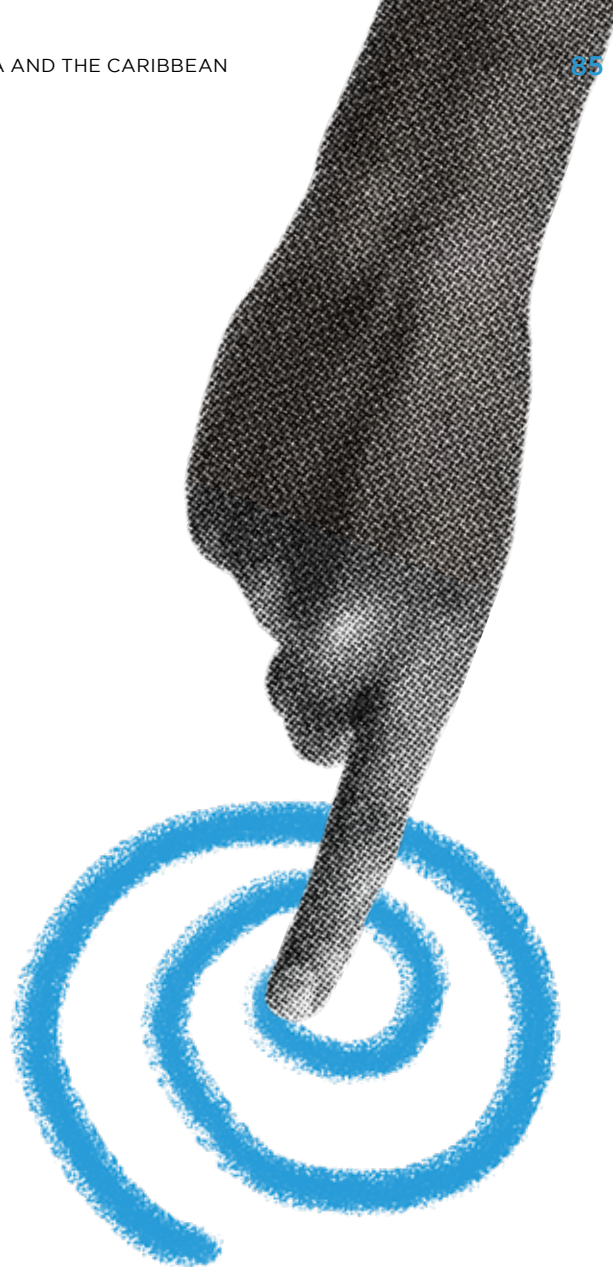
21ST-CENTURY SKILLS

In a context in which technology has become omnipresent, all evidence points towards the invaluable nature of “soft skills”—the skills that are very difficult for robots to develop. The combination of advanced cognitive functions such as critical thinking and problem-solving, executive functions such as metacognition (learning to learn) and self-regulation; and social emotional skills such as empathy, perseverance, and self-esteem, help us to relate to others, and contribute to individual as well as group wellbeing and professional performance. Digital skills must also be added to this list: they allow us to manage and integrate machines into our work in order to bolster it. These are known as transversal or 21st-century skills. The consensus is that, in an increasingly changing and uncertain world, they are skills of vital importance.

Research seems to agree on one interesting point. David J. Deming, a Harvard professor, found²⁰⁵ that people with better social skills work together most successfully through acts as simple as coordination, agreements, and the allocation and division of labor, generally within a teamwork environment. According to his estimate, positions requiring social skills grew by nearly 12% between 1980 and 2012. In the latter year, the Nobel prize winner James Heckman, together with Tim Kautz, published an essay²⁰⁶ that demonstrated how soft skills that are identified with personality traits, such as preferences, goals and motivations, are increasingly valued both academically and professionally. Perseverance, sociability and curiosity can foretell different work and social results in people’s lives. The IADB study, “How Far Can Your Skills Take You?”²⁰⁷ argues that in the near future, the most in-demand abilities for the fastest growing jobs will be digital and teamwork skills.

In terms of the labor market, two important tendencies have emerged: first, the automation of work and jobs, which has already been mentioned. In “The Future of Work,” a report from the Organization for Economic Co-operation and Development (OECD) published in 2019, it is estimated that 14% of current jobs are at high risk of automation, and 32% will undergo radical transformation.²⁰⁸ In Latin America and the Caribbean, this figure is even higher, and in countries such as Chile, Argentina, Mexico or Uruguay, between 20% and 30% of jobs are at a high risk of automation. If robots take over many essential jobs, more people than ever will have to change careers and jobs throughout their lives. It is estimated that around 50% of the professions that will emerge in the next few years will be completely new.²⁰⁹

The labor market is increasingly polarized: on the one hand, there is an abundance of low-paid jobs for an unskilled workforce which, in many cases, requires working with people; this is the case with hairdressers, domestic workers, workers in the restaurant industry, and those professionals who are caretakers of children, older adults and disabled people. On the other hand, there are highly paid jobs which require a combination of advanced cognitive and socio-emotional functions as well as very specialized technical skills. What is disappearing is the category in between, the jobs that were performed by the middle classes that are now increasingly being replaced by machines. When it comes to employment, higher education is the



element that makes a real difference. Finishing high school does not guarantee access to better jobs. Those who have completed higher education earn better salaries, as has been demonstrated in studies that take into account variables such as socio-economic and demographic aspects.²¹⁰ These

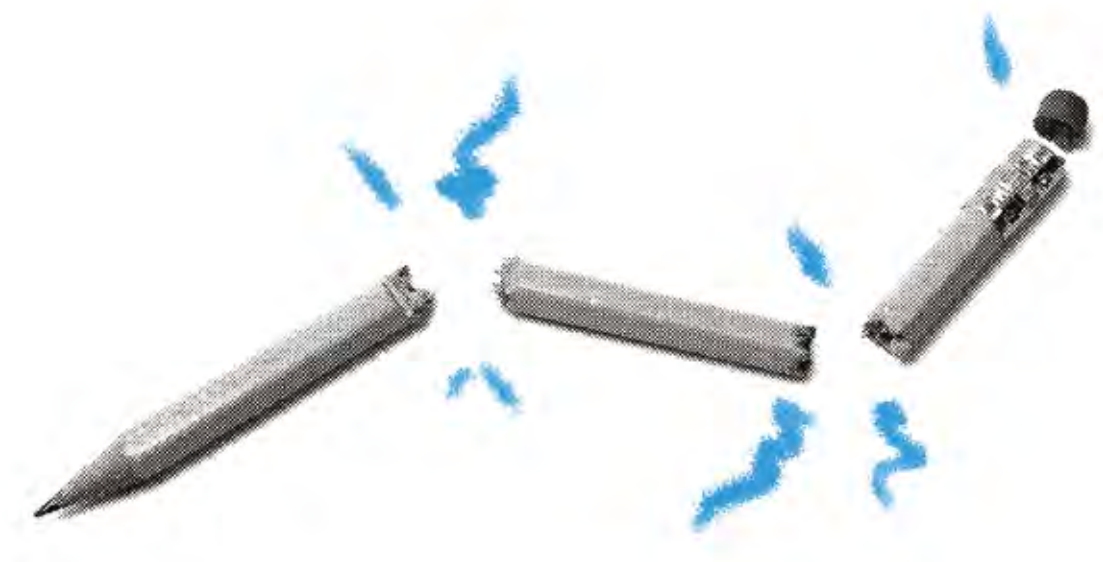
205 David J. Deming, “The Growing Importance of Social Skills in the Labor Market,” *The Quarterly Journal of Economics* (2017). https://scholar.harvard.edu/files/ddeming/files/deming_socialskills_qje.pdf

206 James J. Heckman and Tim D. Kautz, *Hard Evidence on Soft Skills* (Cambridge: National Bureau of Economic Research. NBER Working Paper Series, 2012). <https://www.nber.org/papers/w18121>

207 Nicole Amaral, Nick Eng, Carlos Ospino, Carmen Pagés, Graciana Rucci and Nate Williams, *How Far Can Your Skills Take You? Understanding Skill Demand Changes Due to Occupational Shifts and the Transferability of Workers across Occupations* (Washington: Inter-American Development Bank [IDB]. Labor Markets Division, 2018). <https://publications.iadb.org/publications/english/document/How-Far-Can-Your-Skills-Take-You.pdf>

208 Organization for Economic Co-operation and Development [OECD], *OECD Employment Outlook 2019. The Future of Work* (Paris: OECD, 2019). https://www.oecd-ilibrary.org/employment/oecd-employment-outlook-2019_9ee00155-en

209 Organization for Economic Co-operation and Development [OECD], *OECD Employment Outlook 2019. The Future of Work* (Paris: OECD, 2019). https://www.oecd-ilibrary.org/employment/oecd-employment-outlook-2019_9ee00155-en



advantages are not only for those who have university degrees but also apply to those who have completed shorter technical and technological courses (although there is still a pay gap between those who complete technical studies and those who complete higher education). In countries such as Chile or Colombia, for example, the salary of someone who completed higher education is on average three times higher than that of someone who only finished secondary school.²¹¹

The high levels of youth unemployment contrast, therefore, with a growing demand for technical professionals in the productive sector, which includes the audiovisual industry. Furthermore, COVID-19 has had a devastating effect on both education and youth employment. There are three key issues here: inequity in access to higher education programs, the low quality of higher education (which translates into less inclusion within and connection to the labor market), and the high rates of secondary school dropouts caused

by the pandemic, which will hinder the current generation's possibilities to eventually access higher education or a higher technical course of study. On average, only a third of young people in Latin America and the Caribbean gain access to higher education (both university and technical courses) with considerable variations between countries in the region.²¹² Only around 10% of low-income youth have access to a higher education course, with an enormous regional variation. The countries that offer more public higher education (Argentina, for example) have greater participation from low-income students.²¹³ In the Caribbean, only 4% of low-income students access these courses. On the other hand, faced with the noticeable demise of some jobs, many new jobs are being created. The paradox is that we do not have the necessary skills to respond to this demand. According to the recent report from the World Economic Forum,²¹⁴ the main barrier to the adoption of new technologies is the lack of skills within the labor market. This is a constant within all productive sectors, including the audiovisual industry.

The COVID-19 crisis has made it clear that what is really needed is more workers who demonstrate perseverance, creativity, empathy and flexibility, so they can adapt and continue to learn in environments of uncertainty. We know that these skills have always been necessary and, precisely because they are timeless, they adjust to many different life circumstances, which means that they are required for many jobs. Mastering these skills is key not only in both individual and collective economic terms, but it also contributes to our capacity to innovate and prosper, to coexist with other cultures and relate to the experiences of others.

210 Matías Busso, Julian P. Cristia, Diana Hincapié, Julián Messina and Laura Ripani, *Learning Better: Public Policy for Skills Development* (Washington: Inter-American Development Bank [IDB], 2017). <https://publications.iadb.org/en/learning-better-public-policy-skills-development>

211 Organization for Economic Co-operation and Development [OECD], *Education at a Glance 2019* (Paris: OECD, 2019).

212 The United Nations Educational, Scientific and Cultural Organization [UNESCO], International Institute for Higher Education in Latin America and the Caribbean [IESALC], *Towards universal access to higher education. International trends* (2020). <https://www.iesalc.unesco.org/en/wp-content/uploads/2020/11/Towards-Universal-Access-to-HE-Report.pdf>

213 Elena Arias Ortiz, Iván Bornacelly, Gregory Elacqua, *Hablemos de política educativa en América Latina y el Caribe #6: Educación superior en América Latina: ¿Cómo las crisis económicas de las últimas décadas han afectado la matrícula?* [Let's Talk About Education Policy in Latin America and the Caribbean #6: How Have the Economic Crises in the Last Few Decades Affected Matriculation?] (Washington: Inter-American Development Bank [IDB], 2021). <https://publications.iadb.org/es/hablemos-de-politica-educativa-en-america-latina-y-el-caribe-6-educacion-superior-en-america-latina>

214 World Economic Forum, *The Future of Jobs Report 2020* (Geneva: WE Forum, 2020). <https://es.weforum.org/reports/the-future-of-jobs-report-2020>

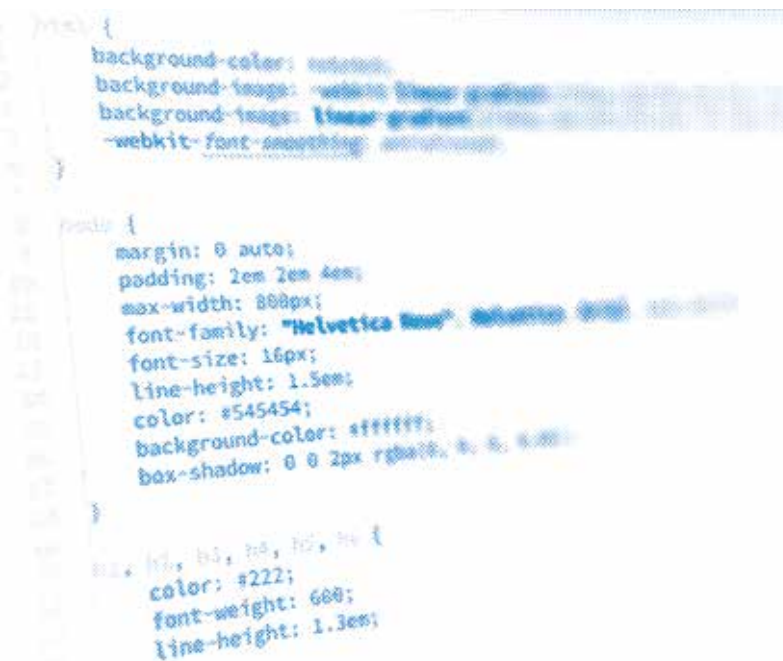
LEARNING IN A DIGITALIZED WORLD

Let us imagine that we set out to learn how to master a certain software, write television scripts or learn a technical profession: how do we face a process that requires learning new skills? Making a deliberate effort to learn, establishing goals and self-regulating, is part of what experts call “learning to learn.” According to an IADB study,²¹⁵ this skill is of core importance to achieve the high-priority education objectives stipulated by the OECD.

Statistics indicate that in the United States at least, people remain in the same job for an average of 4.2 years.²¹⁶ Evidence demonstrates that the youngest workers value the experience a job provides over loyalty to a single company. In this context, lifelong learning²¹⁷ is crucial—this skill requires developing a drive for voluntary, continuous and motivated learning. As previously stated, the average worker will change jobs multiple times during their lifetime, so this capacity to learn will help to better navigate a dynamic job market that may continue to pose new challenges.

The fourth industrial revolution also requires moving towards education 4.0, which provides young people with the tools needed for the modern world. Education systems must invest in skills that can be transferred from one job to another, and that do not expire or become outdated. Education has to provide students with concrete skills: the ones they will need to succeed in life, that will not lose value over time, but instead grow more valuable, and allow for acquiring even more skills.

Currently, supply is widely diversified, accompanied by the progressive digitalization of education services and new products that also have their roots in the entertainment industry, also known as ‘Edutainment’. This new content based on stories, movies, or video games, that once would have been unimaginable in a classroom, has



become a promising educational tool. As argued in *Video Games: More than Just a Game. The Unknown Successes of Latin America and Caribbean Studios*, the concept of learning while playing is not new, and there is a great deal of consensus about its benefits.²¹⁸

What does the private sector do when it needs people to develop their businesses and what do individuals do when they are looking for job opportunities? Hire for skills instead of university degrees, and move towards quicker, cheaper and more versatile alternatives to traditional degrees. Education will be increasingly modular, allowing individuals to forge their own educational pathways according to their preferences and needs. We have also witnessed exponential growth in the education technology sector (EdTech),²¹⁹ which has accelerated during the pandemic. However, despite this robust growth, it has yet to reach the dimensions seen in other sectors such as telemedicine.²²⁰ The COVID-19 crisis has only exacerbated this lag.

215 Héctor Ruiz Martín, *Habilidades para la vida: aprender a aprender* [Skills for Life: Learning to Learn] (Washington: Inter-American Development Bank [IDB], 2020). <https://publications.iadb.org/es/habilidades-para-la-vida-aprender-aprender>

216 U.S. Bureau of Labor Statistics, “Employee Tenure Summary,” Economic News Release (September 22, 2020). <https://www.bls.gov/news.release/tenure.nr0.htm>

217 Emile Irwin, Joe Pickerill and Brendan Desetti, *Skills for life: lifelong learning* (Washington: Banco Interamericano de Desarrollo [BID], 2020). <https://publications.iadb.org/en/skills-for-life-lifelong-learning>

218 Alejandra Luzardo, Belisario de Azevedo, Mercedes Mateo Díaz, Laura Becerra, Gerardo Funes, Martina Santoro, Phillip Penix-Tadsen and Juan Pablo Pison, *Los videojuegos no son un juego. Los desconocidos éxitos de los estudios de América Latina y el Caribe* (Washington: Banco Interamericano de Desarrollo [BID], 2019), 195. https://publications.iadb.org/publications/spanish/document/Los_videojuegos_no_son_un_juego_Los_desconocidos_%C3%A9xitos_de_los_estudios_de_Am%C3%A9rica_Latina_y_el_Caribe.pdf

219 EdTech Digest, “Growth of EdTech through 2025” (November 13, 2020). <https://www.edtechdigest.com/2020/11/13/growth-of-edtech-through-2025/>

220 Yyannu Cruz Aguayo; Celeste de Marco; Mercedes Mateo Díaz; Ricardo Enrique Paz Cuevas; Fernando Peirano; Cecilia Sleiman, *Transformación digital en salud y educación. El presente y futuro del trabajo social en América Latina* (Washington: Banco Interamericano de Desarrollo [BID], INTAL, 2021).

WHAT IS THE TASK OF EDUCATION SYSTEMS?

Latin America has one of the highest school dropout rates in the world, not only for economic reasons, but also due to apathy and a lack of motivation.²²¹ A change of course is increasingly urgent. Making this transformation requires the following:

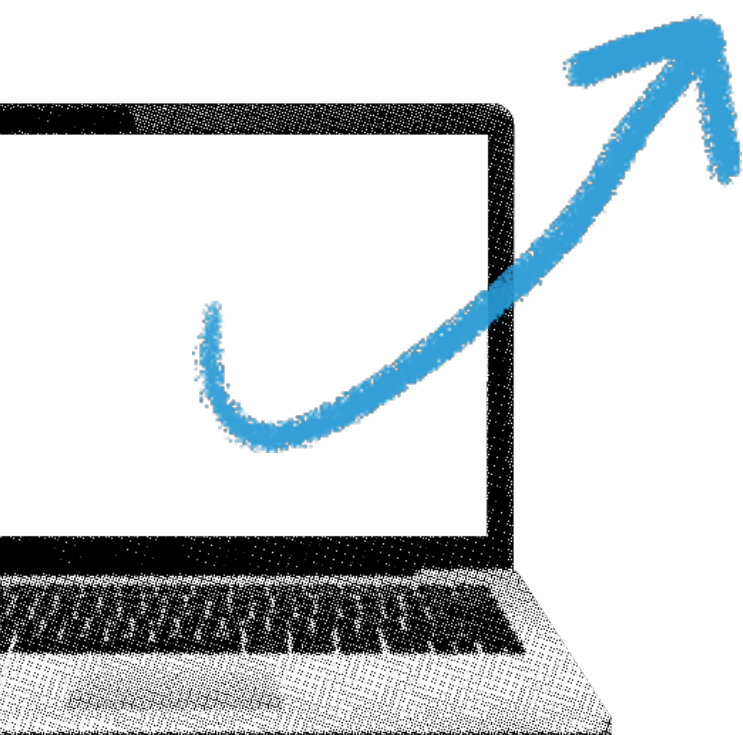
- i. **Investment in non-perishable skills that can be transferred from one occupation to another.** Education must provide students with concrete skills that will be useful for succeeding in life and that do not lose value over time, but rather increase in value and allow for acquiring other skills.
- ii. **In the future, hybrid education will dominate.** Beyond the simple combination of in-person and online, hybrid models imply a more effective use of the learning possibilities offered by digital tools in the classroom. This involves combining traditional and non-traditional education models, which makes better use of the increasing supply of emerging services in the EdTech sector in order to personalize learning; it implies making trajectories more flexible so as to reconnect with students who dropped out during the pandemic and with all those who abandoned their training courses in recent years. Hybrid models also mean identifying and embracing new training alternatives.
- iii. **A progressive unbundling of education can be foreseen.** Until now, education was practically a monolith and educational trajectories were highly predetermined. Private initiatives are concentrating on the specific processes within this chain: the digitalization of content, the adaptation and personalization of learning, and the certification and recognition of skills, among other processes. A clear disruption is being produced here. Since these processes are ultimately interdependent, when a change is made in one process, all the other processes in the chain are affected. In other words, when tools for the certification of skills are established, the need arises to create content that develops these skills. Another example of this process is the transition from diplomas to certifications. Diplomas were typically used to recognize the achievement of different kinds of knowledge and skills: the problem is that the diploma cannot be broken down into parts and there is no way of knowing how that knowledge was acquired. An employer cannot make an interpretation of this diploma, i.e., cannot know whether the applicant actually has the knowledge the diploma claims. For this reason, there has been an evolution towards certifying specific skills.
- iv. **The education technology sector will be growing exponentially (EdTech).** The supply is increasingly diverse, and this implies the progressive digitalization of education services. According to a study by the consulting firm Holon IQ,²²² education globally is an industry worth more than six trillion USD (it is estimated that it will reach ten trillion by 2030). However, digital investment is less than 3%, much lower than investment in other sectors such as health. In other words, investment in this sector is insufficient for the level of the challenge it has to face.
- v. **Demand will be changing.** Substantial changes are expected in the behavior of “consumers” in education and training. Both supply and demand are becoming more sophisticated. This means that students will become more demanding, and will expect concrete results in exchange for their investment, in terms of work and income, whereas teachers will be more open and flexible when teaching, and will need more training in digital skills.
- vi. **It is crucial to connect students with jobs.** Educational opportunities lead to economic opportunities. What a student learns is not defined by a final grade, but by their ability to find a good job, start a successful business or enjoy a prosperous life.
- vii. **Strengthening the ecosystem by forging alliances with the private sector.** It is never a good idea to become isolated: education systems must learn from what goes on in the whole of the ecosystem, and generate alliances with the private sector and civil society in order to transform education.

221 Mercedes Mateo Díaz and Graciana Rucci (editors), *The Future is Now: Transversal Skills in Latin American and the Caribbean in the 21st Century*, (Washington: Inter-American Development Bank [IDB], 2019). <https://publications.iadb.org/en/future-now-transversal-skills-latin-america-and-caribbean-21st-century>

222 Holon IQ, “10 charts to explain the Global Education Technology Market” (January 25, 2021). <https://www.holoniq.com/edtech/10-charts-that-explain-the-global-education-technology-market/?fbclid=IwAR24k8DE3DKxI8EyKtvXnGfeeBkNrW9BBmOo47F9sMbuwkX9xqVnirCIEuw>

The Inter-American Development Bank (IADB) is developing the CLIC platform for skill certification sustained by a multidisciplinary team of experts from inside and outside the organization, composed of system engineers, neuroscientists, cognitive psychologists, economists, and experts in innovation and platform economy. The objective is for CLIC to help young people from the entire region to validate and certify the cross-cutting skills they need to acquire, regardless of which sector they work in or what job they may have. This refers to digital skills, teamwork, and collaboration, critical thinking and creativity. CLIC also helps users to demonstrate these skills in the labor market via digital badges, portfolios and résumés. Through CLIC, users can also create a regional network of peers and mentors since a network of contacts is key to a successful professional life.

This is an innovative initiative because it breaks down the process of education and training production, and addresses one of those parts: certification. There is an unmet need at this juncture. The proposal is not only new, but also relevant: it helps young people to connect with economic opportunities, valuing their skills. This innovation is also disruptive: if we value skills instead of traditional degrees and diplomas, the logic governing the education system changes and we move towards the logic of the recruitment or labor market. Finally, new possibilities open up for low-income youth so they can access better jobs, as long as they have the capabilities even if they cannot afford expensive university fees.



PUBLIC POLICIES AND THE ECOSYSTEM

Neither the obsolescence of specific technical skills nor the disconnect between education and the needs of the labor market are specific to the cultural and creative industries or the audiovisual sector.

The region is experiencing a dramatic scarcity of skills, with gaps between the supply and demand, which are increasing as the industry diversifies, innovates, and addresses the needs of the global market. This tendency is not only due to the speed at which the market is transforming and adapting to technological changes, but also to the difficulties that formal systems of education and training face in responding to these new requirements. The good news is that the supply of higher education programs has not only expanded, but also diversified, broadening to include vocational technical education, which today comprises around 35% of the enrollment in Colombia and Peru, and 45% in Chile.²²³ However, in cultural terms, a preference for university education as opposed to vocational training persists among students and their families.

Now more than ever, the audiovisual industry must become an integral part of designing education and training policies as well as finding solutions. It must also be co-responsible for these policies, that is to say, contribute to their funding and maintenance. The industry is in a good position to identify the skill gaps and determine if training programs are relevant and effective, and how they must adapt. It is also in a good position to offer opportunities for putting these skills into action through dual training practices and systems (for instance, apprenticeships). However, it also has to offer continuous training and development opportunities to employees through upskilling and reskilling programs.

In addition, the industry not only consumes talent, but also contributes to broadening and diversifying the supply of education and training services. The market is moving towards a progressive democratization of quality, which could become an opportunity to achieve greater equity. For this reason it is necessary to support projects and initiatives that co-create education and training alternatives together with the private sector. The new stakeholders within education can contribute not only towards closing the skills gap, but also the gap in access to relevant and high quality teaching.

We are witnessing the progressive segmentation and diversification of how education and training are supplied, accompanied by a reduction in costs and time. For low-income youth and families, these two dimensions are of vital importance. For many, university degrees are out of reach. When a young person has to contribute income to the household as soon as possible, it is very unlikely they will invest five years in studying to obtain a diploma.

223 María Paola Sevilla B., *Panorama de la educación técnica profesional en América Latina y el Caribe*, Serie Políticas Sociales N° 222 [Panorama of Technical Professional Education in Latin America and the Caribbean, Social Policies Series N°222] (United Nations, Economic Commission for Latin America and the Caribbean [ECLAC], 2017). <http://up-rid2.up.ac.pa:8080/xmlui/handle/123456789/1723>

**IT IS NOT POSSIBLE TO INNOVATE,
DEVELOP NEW INDUSTRIES AND COMPETE
IN A GLOBAL ECONOMY WHEN MORE
THAN HALF THE POPULATION HAS NOT
COMPLETED SECONDARY SCHOOLING.**





In the face of this reality, financial support programs and subsidies to low-income students are particularly relevant. Linking this support to skill development programs or building alliances between education systems and the industry is something that is already happening to a certain extent in countries like Brazil, where the National Industrial Learning Service (Serviço Nacional de Aprendizagem Industrial/ SENAI) offers two important models of affordable education, oriented towards developing technical knowledge.

Within the audiovisual sector, 21st-century skills will be critical for above the line careers or professions (creative talent), as well as those below the line. Creativity, for example, is a fundamental skill for a screenwriter or director; digital skills are key for a sound engineer; socioemotional skills for a make-up artist, or management skills for a showrunner. These are all 21st-century skills.

New industries cannot develop unless there is talent accompanying them, and this implies having a State vision and policy that transcends governments, and sustained public and private investment. It also implies analyzing the gap in the skills required for the development of the AV industry.

In the specific case of the cultural and creative industries, its expansion must begin with making the social and economic value of these areas of study more visible to young people and their families. It is also essential to make these professions visible so that youth know that these possibilities exist, are in high demand and offer career opportunities, so that they choose them when it is time to decide their educational pathway. Beside creating a shift in culture and mindset, it is important to develop a concrete and effective supply of education services. For governments and stakeholders, it is important to support programs that help to resolve these problems of youth employability and training.

Both the audiovisual industry and the skills it requires are part of a movement towards smart development. It is not possible to innovate, develop new industries and compete in a global economy when more than half the population has not completed secondary schooling. The joint policies and actions of the public and private sectors must focus not only on the young people that already form part of the workforce, but also on those who are yet to come. .

During this fourth industrial revolution, many spaces for economic participation are opening up; we must take advantage of them in order to accelerate post-pandemic recovery, modernize economies and expand social opportunities. To achieve this, through the IADB Vision 2025,²²⁴ regional value chains are being strengthened and digitalization is accelerating. Production is being brought closer to consumer markets via an active nearshoring strategy; new pathways are opening up and non-traditional sectors such as the green industry are being strengthened, revitalizing the significant contribution that can be made by the cultural and creative sector. However, this is not only achieved by supporting private companies to make strategic changes. Talent is the most essential ingredient.

This is not something that can be achieved by a few people or that belongs to one sphere only. This effort must be undertaken by all. Creativity, which is the ability to find new ways of thinking and solving problems, is what has taken the audiovisual industry this far: this is the moment to make it more flexible, to find ways of transferring it and to apply it in a practical way in order to generate an increasingly healthy ecosystem, in which opportunities are more accessible for the majority. If people need training but not necessarily a university degree in order to find higher quality and better paid jobs, this is not just good news for a market that urgently needs more qualified talent, but something that could also improve economic opportunities for millions of individuals.

224 Inter-American Development Bank (IDB), Inter-American Investment Corporation, *Vision 2025. Reinvest in the Americas: A Decade of Opportunity* (2021). <https://idbdocs.iadb.org/wsdocs/getdocument.aspx?docnum=EZSHARE-328957462-88>



FROM THE ARTISTIC TO THE TECHNICAL: ABOVE THE LINE AND BELOW THE LINE

Like any sector growing at a quick pace, the needs of the audiovisual industry in Latin America and the Caribbean are changing radically, in part thanks to the rapid transformation of its processes. Before being able to see it on the screen, any audiovisual project goes through four general phases: development, pre-production, production (the filming stage) and post-production. In recent years, the rise of animation, visual effects, special effects and virtual production, and its growing incorporation into the audiovisual pipeline, signals that it is becoming increasingly important to be trained in how to use new technologies and processes. Facilitating the restructuring and modernization of work and technology plays a crucial part in reactivating the cultural and creative industries, according to recent research by the Inter-American Development Bank.²²⁵

In the audiovisual sector, there is above-the-line and below-the-line talent: the former refers to artistic personnel—particularly those related to directing, acting, screenwriting and cinematography—and the latter alludes to technical skills including numerous jobs related to sound, make-up, art direction, animation, post-production, construction, script supervision, among others. In the survey conducted among audiovisual producers, commissioned for this book and carried out by the independent consultant Olsberg SPI, 58% of the interviewees considered that there is not enough technical personnel in Latin America and the Caribbean. Many also reported that the standard of training for existing skills is insufficient and consequently there is broad agreement that we need to continue to train and update skills. It is urgent to bring skills up to date to meet global standards of quality, which are often seen as more “demanding.”

²²⁵ See *Evaluación del impacto del COVID-19 en las industrias culturales y creativas: una iniciativa conjunta del MERCOSUR, UNESCO, BID, SEGIB y OEI* [Evaluation of the Impact of COVID-19 on the Cultural and Creative Industries: A Joint Initiative of MERCOSUR, UNESCO, IDB, SEGIB, and OEI] available at <https://es.unesco.org/fieldoffice/montevideo/ImpactoCovidCultura>

ABOVE THE LINE AND BELOW THE LINE

ABOVE-THE-LINE TALENT

Artistic skills:
these relate to the creative development
of the production.

Director
Executive Producer
Producer
Showrunner (on TV)
Screenwriter
Casting Director
Principal Cast
Director of Photography (when this is a
recognized name)

BELOW-THE-LINE TALENT

Technical skills:
these include the day-to-day work of
pre-production, production and post-production.

Management

Script Supervisor/Shoot secretary (script)
First assistant director
Second assistant director

Production Office

Production Assistant
Production Secretary
Production Accountant
Production Coordinator
Production Unit Head
Human Resource Coordinator
IT Security Manager

Art Direction and Production

Production Designer
Director of Photography
Art Director
Art Department Coordinator
Set Designer
Greensperson

Post-Production

Editor
Animator
Visual Effects (VFX)
Sound Mixer
Sound Editor
Recording Engineer



ABOVE THE LINE AND BELOW THE LINE

BELOW-THE-LINE TALENT

Technical skills:
these include the day-to-day work of
pre-production, production and post-production.

Camera Crew/Machine Operators/Electricians

Director of Photography
Cameraperson
Focus Puller
Steadicam Operator
Aerial Camera Operator
Chief Lighting Technician (Gaffer)
Sound Technician
Grips
Electrician

Costume

Costume Designer
Costume Buyer
Costume Supervisor
Tailor

Make-up and Styling

Make-up Artist
Special Effects Make-up Artist
Stylist
Special Effects Stylist

Action Doubles and Special Effects

Action Doubles Coordinator
Special Effects Supervisor

Construction

Construction Director
Plasterer
Carpenter
Painter

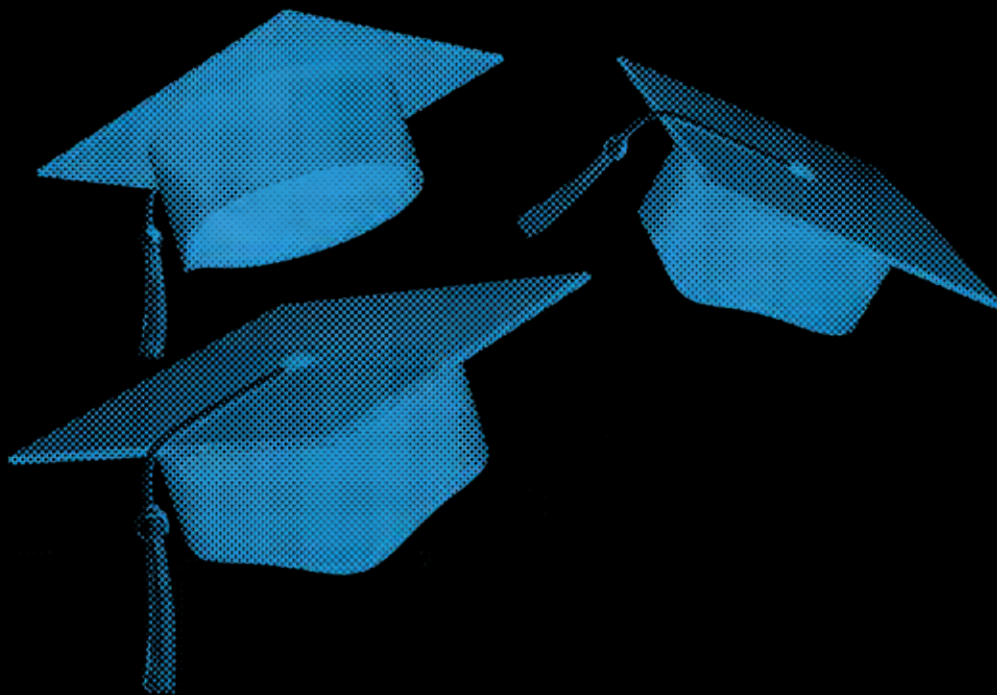
Health and Safety

Safety Supervisor
COVID Safety Marshal

Locations/Unit/Transport

Locations Director
Catering
Location Scout





Different moments along the production pipeline offer diverse opportunities for skill development and updating. The audiovisual sector is a good area for workers with experience in other technical sectors to adapt their knowledge to a cinema, streaming or television project. This process, known as upskilling, consists, for example, in training a make-up artist to become a visual effects make-up artist, or an audio engineer specialized in concerts to undertake the sound editing for a feature length film. In other words, existing knowledge is built upon in order to develop new skills for an industry that requires them.

One of the needs most often expressed by experts from the region is for screenwriters. This skill is not difficult to find, but many have expressed that our conventional forms of developing scripts in the region are not in tune with the narrative styles of contemporary content.

Interviewees have insisted on the importance of amplifying voices and making creative spaces more inclusive of historically excluded groups—for example, women, indigenous people, the Black community and people with disabilities—which is why it is crucial to start training programs, grants, boot camps and artistic residences to boost diversity.

As will be seen in the following pages, our region has a wide range of programs and best practices that have been put into place over the last few decades by the private and public sectors. However, due to the rapid evolution of the industry, it is essential to continue innovating and developing structured methods of job placement in which businesses and the education sector join forces. One area in which this could reap rewards is within those technical education spaces that already exist. Reactivating technical

education could be a very beneficial (win-win) endeavor, since according to the Organization of Ibero-American States, “the pandemic has created widespread confinement and a disruption to schooling with serious consequences, a negative impact that has affected education at all levels, but particularly technical education because it requires a high level of in-person classes.”²²⁶

Latin America and the Caribbean must continue studying and understanding the audiovisual sector in order to identify the training gaps, which can vary from one country to another. More research and studies could be a valuable first step towards better understanding the sector’s deficiencies within countries, regions or even cities.

Other important issues include the divide between school and industry, the democratization of access to executive positions or the tensions between filmmakers’ artistic ambitions and the industry’s commercial needs. The importance of improving the level of English among technical staff in non-English speaking countries is another issue often discussed within the sector. Many of interviewees agreed on the urgency of learning about legal issues, improving their work processes and adapting them to industry standards.

Finally, precarious employment and the difficulty in accessing social security systems are very urgent issues in the vast majority of regional audiovisual ecosystems. This requires discussion since guaranteeing access to health care and a dignified retirement to those who work within the cultural and creative industries is a concern that has not yet been addressed.

226 Natalia Armijos, personal communication (April 5, 2021).

WHICH ARE THE MOST URGENT NEEDS AND CHALLENGES AUDIOVISUAL PRODUCERS FACE IN LATIN AMERICA AND THE CARIBBEAN?

A SURVEY OF THE INDUSTRY

This survey, designed and disseminated by the international creative industries consultancy Olsberg SPI, received responses from producers in 22 of the 26 countries in which the IADB operates in Latin America and the Caribbean. This response is largely reflective of the distribution of the audiovisual industry in the region.

- The survey received 417 valid responses, all anonymous.
- **85% of respondents were based in continental Latin America and 15% were based in the Caribbean.**
- Producer associations, film commissions and other professional networks were key in ensuring that the survey reached its intended audience.



85%
Latin America

15%
Caribbean Islands



The survey was conducted between February 23 and March 22, 2021. It is important to mention that it took place during a period of high COVID-19 incidence, and this may have affected producer mobility and perception, especially with regards to high-demand positions in the immediate present (i.e., COVID safety marshal).

The five countries with the highest response rate were:



BRAZIL
16%

ARGENTINA
10%

MEXICO
10%

COLOMBIA
10%

URUGUAY
9%



1. WHAT CHALLENGES DOES THE AUDIOVISUAL WORKFORCE FACE IN LATIN AMERICA AND THE CARIBBEAN?

The lack of adequate training / courses offered by educational institutions, and therefore the disconnect between academic curriculum and market demand, was seen as the main challenge faced by the audiovisual production workforce in Latin America and the Caribbean.

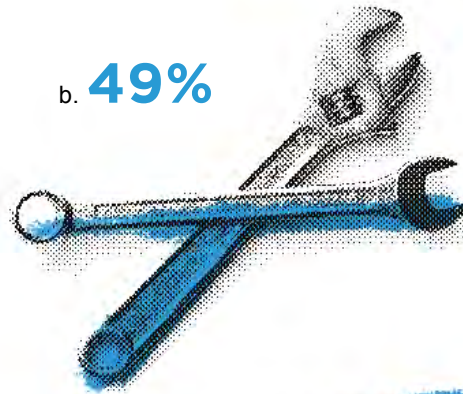
The top 5 challenges associated with developing an audiovisual workforce in the region were

- a. **Lack of adequate training/courses offered by educational institutions in the Latin American and Caribbean countries (68%).** Since the vast majority of respondents (83% of 348 responses) employed film school graduates for their productions, this indicates that production companies are required to provide on-the-job training for recent graduates in order to ensure that they meet the production's training demands. It also suggests that universities and training centers are disconnected from the needs of the audiovisual industry.
- b. **Low number of below-the-line workers with required skill set (49%)**
- c. **Lack of effective regulations or public policies to attract foreign talent (47%)**
- d. **Negative social perception of poor pay (40%)**
- e. **Negative stereotypes associated with the AV sector (30%)**

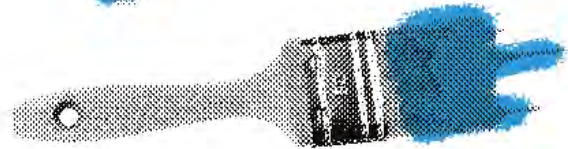
Other challenges reported include a lack of access to funding and investment for creative projects, as well as a lack of labor rights and regulations for below-the-line professionals.



a. **68%**



b. **49%**



c. **47%**



d. **40%**



e. **30%**

“THERE’S A LARGE NUMBER OF HIGHLY QUALIFIED PROFESSIONALS IN BRAZIL, BUT THINGS WOULD CERTAINLY IMPROVE IF THERE WERE COURSES SPECIFICALLY DESIGNED FOR BELOW-THE-LINE WORKERS.”

2. WHERE DO PRODUCERS WORK?

Most of the producers surveyed work and undertake the majority of their work in the same country.

- a. The vast majority (82%, n= 417) produce between 75% and 100% of their work in the country in which they are based.
- b. Only 7.5% reported doing under 50% of their work in the country in which they are based.



82%

produce between 75% and 100% of their work in the country in which they are based.



7.5%

reported doing under 50% of their work in the country in which they are based.

This suggests that production work in Latin America is not highly “internationalized.” However, the fact that producers work mostly in their own countries could facilitate in-person training.

3. HOW BIG ARE AUDIOVISUAL PRODUCTION COMPANIES IN OUR REGION?

Around half of respondents either work or are partners in small-scale production companies with five or less below-the-line full-time equivalent employees. When a company starts a production, it tends to expand its workforce by taking on freelance and part-time employees.

- a. The most common production company size was **between 2-5 full-time equivalent below-the-line workers** (51% of responses, n= 409)
 - Only 13% employed more than 11 full-time equivalent below-the-line workers.
 - 96% of respondents stated hiring part-time or freelance below-the-line workers during productions. Only 4% do not.
 - Approximately half of respondents (48% n= 417) were involved in productions that employed over 11 part-time or freelance below-the-line workers.
- b. Level of experience
 - Respondents had, on average, a high level of experience: 70% had participated in over 11 productions.
 - 30% had participated in 1-10 productions..

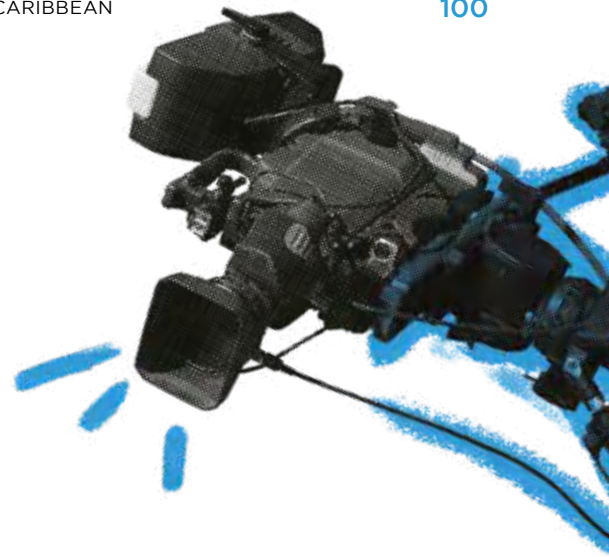
“It can be said that most productions are in the hands of three large companies with an endogamous work dynamic. So there isn’t a lack of professionals, but rather a lack of practice. Because they are unable to break into the sector, many professionals end up doing other types of work.”

4. WHERE ARE AUDIOVISUAL PROFESSIONALS RECRUITED?

The survey shows that film schools are the most common source of professional talent for audiovisual productions. Internships and placement programs are less common.

“I think grants and incentives should support small production companies and help them grow. This will allow them to develop and would create a much more united industry.”

51%
production
companies
have 2 to 5
employees



a. **83%**

Since 68% of respondents mentioned a lack of adequate training and courses in their countries, this could indicate that there is an opportunity to align educational curricula with the industry's needs.

- a. The large majority of respondents (83%, n= 348) reported typically employing film school graduates for productions.
- b. About half of productions (47%) have an internship or placement program. Country-level data shows that in Uruguay and especially in Argentina, availability of internships is lower than in the rest of the region. Four out of five Argentinian respondents (81%) reported that their productions lacked internship programs.

b. **47%**

5. TALENT EXISTS, BUT DO WE HAVE THE RIGHT TECHNICAL SKILLS?

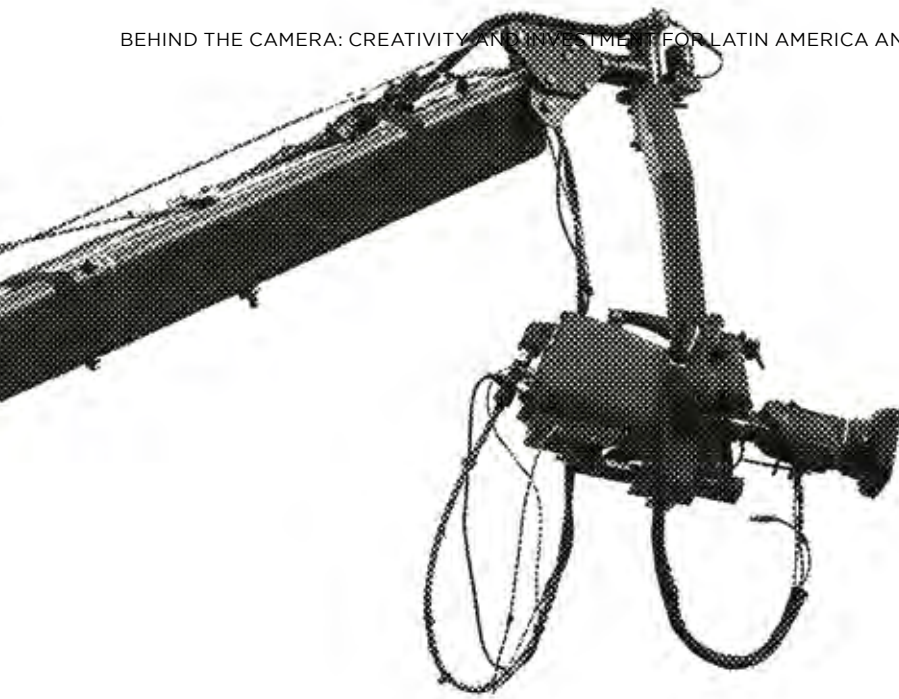
More than half of all surveyed participants (58%) stated that there is a shortage of below-the-line audiovisual professionals in their countries.

However, even among respondents believing there is no shortage of below-the-line professionals, many stated that updating existing technical skills was imperative.

5.1 WHICH PROFESSIONAL PROFILES ARE IN SHORT SUPPLY IN THE LATIN AMERICAN AND CARIBBEAN AUDIOVISUAL INDUSTRY?

The survey assessed the supply of 50 below-the-line roles in 12 departments, including: Camera / Grip / Electrical; Art and Production Designer; Production Officer; Post-production; Stunts and Special Effects; Hair-Styling and Make-up; Construction; Health and Safety; Costume and Wardrobe; Location / Transportation; Director and Artistic Director; Writers and Script.





Currently, below-the-line roles associated with stunt coordination and special effects are in high demand in Latin America and the Caribbean. Contrary to visual effects, which are associated with post-production, special effects work takes place during filming and can include designing a controlled explosion, a car wreck or building a collapsible model that simulates a falling building. Special effects combine art, engineering and creativity, and offer creative solutions that look spectacular on the screen. The stunt coordinator, on the other hand, is the person on set in charge of supervising and planning stunts, which often entail risk.

The demand for special effects-related skills is a trend found in other mature industries in other regions of the world and is likely to reflect the growing demand streaming companies have for increasingly sophisticated content in which visual and special effects play a significant role.

Production design, which ranked third place among the most in-demand skill sets in the region—and is currently the position in the highest demand in mature markets such as Brazil, Mexico, Argentina, Chile and Colombia—plays a central role in a production's ambience. "As head of the art department, the production designer is in charge of making sure each shooting location is perfect, prepared and on point with the vision of the film".²²⁷ In other words, they play an important role in conceiving the aesthetic of a film or series.



227 New York Film Academy, "What Does a Production Designer Do?" (February 25, 2017). <https://www.nyfa.edu/student-resources/what-does-a-production-designer-do/>

TOP 10 BELOW-THE-LINE TECHNICAL POSITIONS CURRENTLY IN HIGH DEMAND IN LATIN AMERICA AND THE CARIBBEAN IN 2024

60%

Production Designer

**53%**

Special Effects Manager

**46%**

Script Supervisor

**51%**

Stunt Coordinator

**44%**

COVID Safety Marshal

**42%**

Construction Manager

**51%**

VFX

**36%**

Steadicam Operator

**41%**

Special Effects Make-up Artist

**42%**

Greensperson



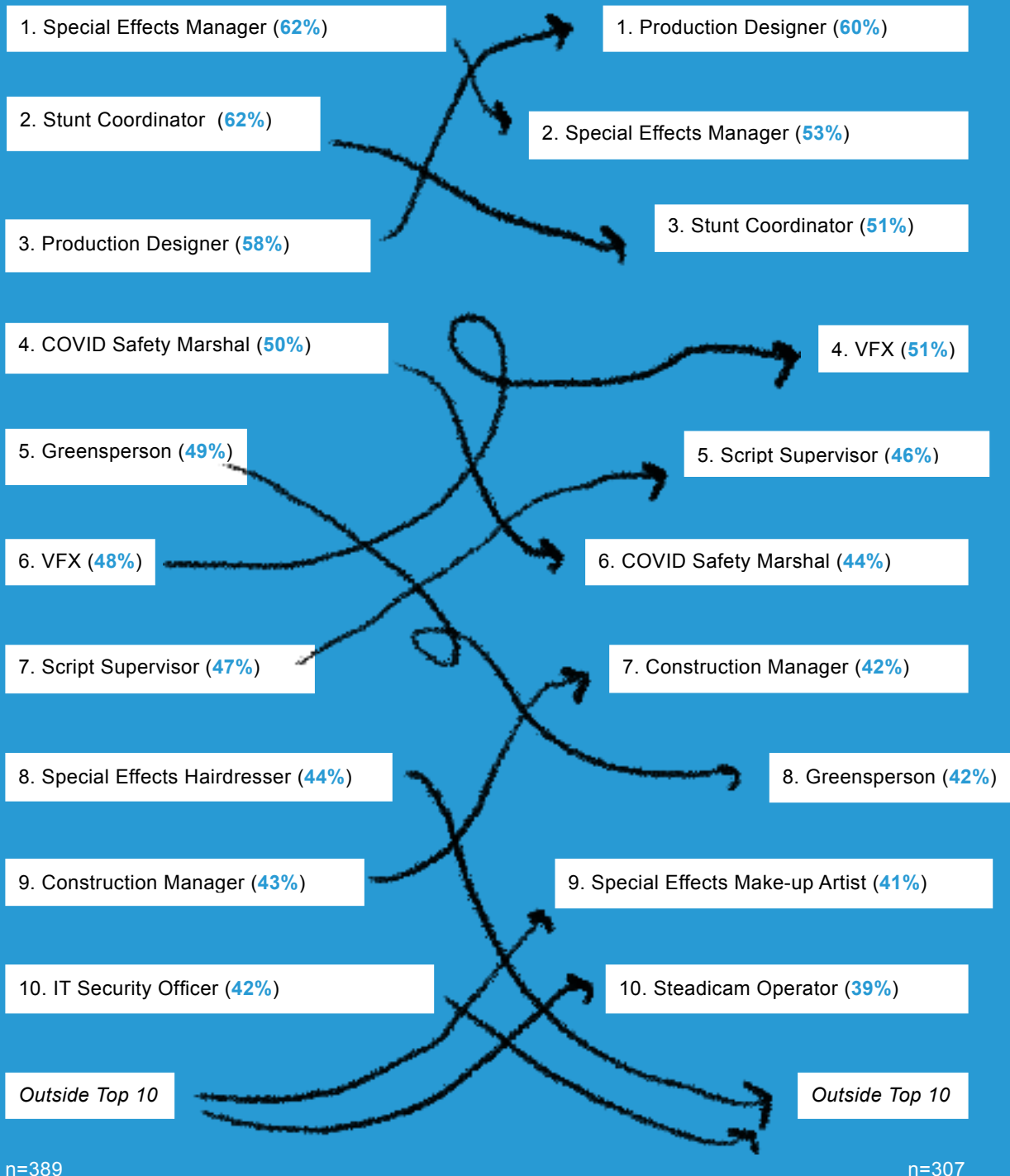
TOP 10 BELOW-THE-LINE TECHNICAL POSITIONS CURRENTLY IN HIGH DEMAND IN LATIN AMERICA AND THE CARIBBEAN

TOP 10 BELOW-THE-LINE ROLES

CURRENTLY IN SHORTEST SUPPLY
(N = 389)

TOP 10 BELOW-THE-LINE ROLES

LIKELY TO BE IN HIGHER DEMAND IN 2024
(N = 307)



TOP 10 BELOW-THE-LINE ROLES IN HIGHEST DEMAND IN MEDIUM AND LARGE MARKETS

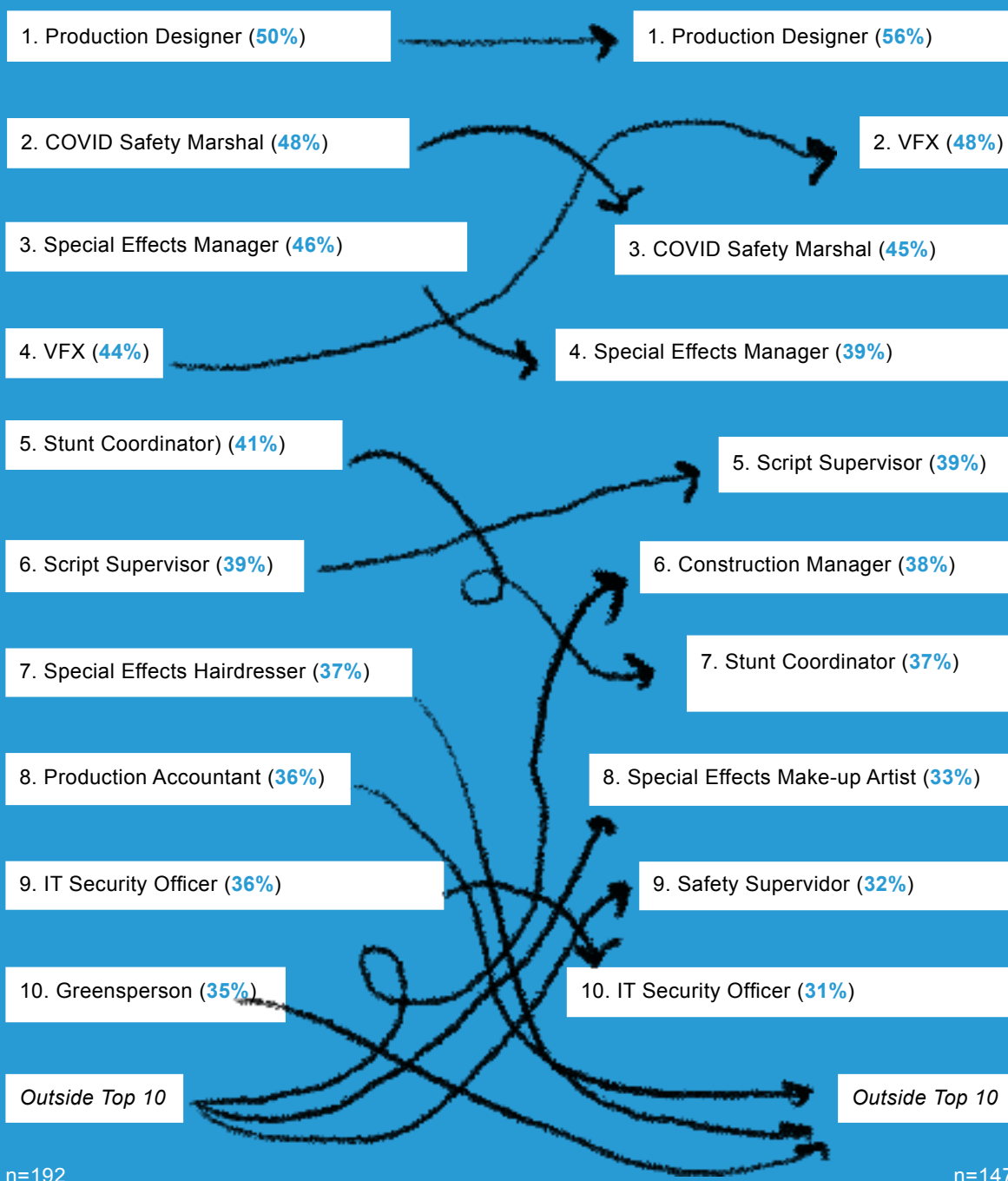
(ARGENTINA + BRAZIL + CHILE + COLOMBIA + MEXICO)

TOP 10 BELOW-THE-LINE ROLES

CURRENTLY IN SHORTEST SUPPLY
(N = 192)

TOP 10 BELOW-THE-LINE ROLES

LIKELY TO BE IN HIGHER DEMAND IN 2024
(N = 147)



TOP 10 BELOW-THE-LINE POSITIONS IN HIGH DEMAND IN EMERGING MARKETS

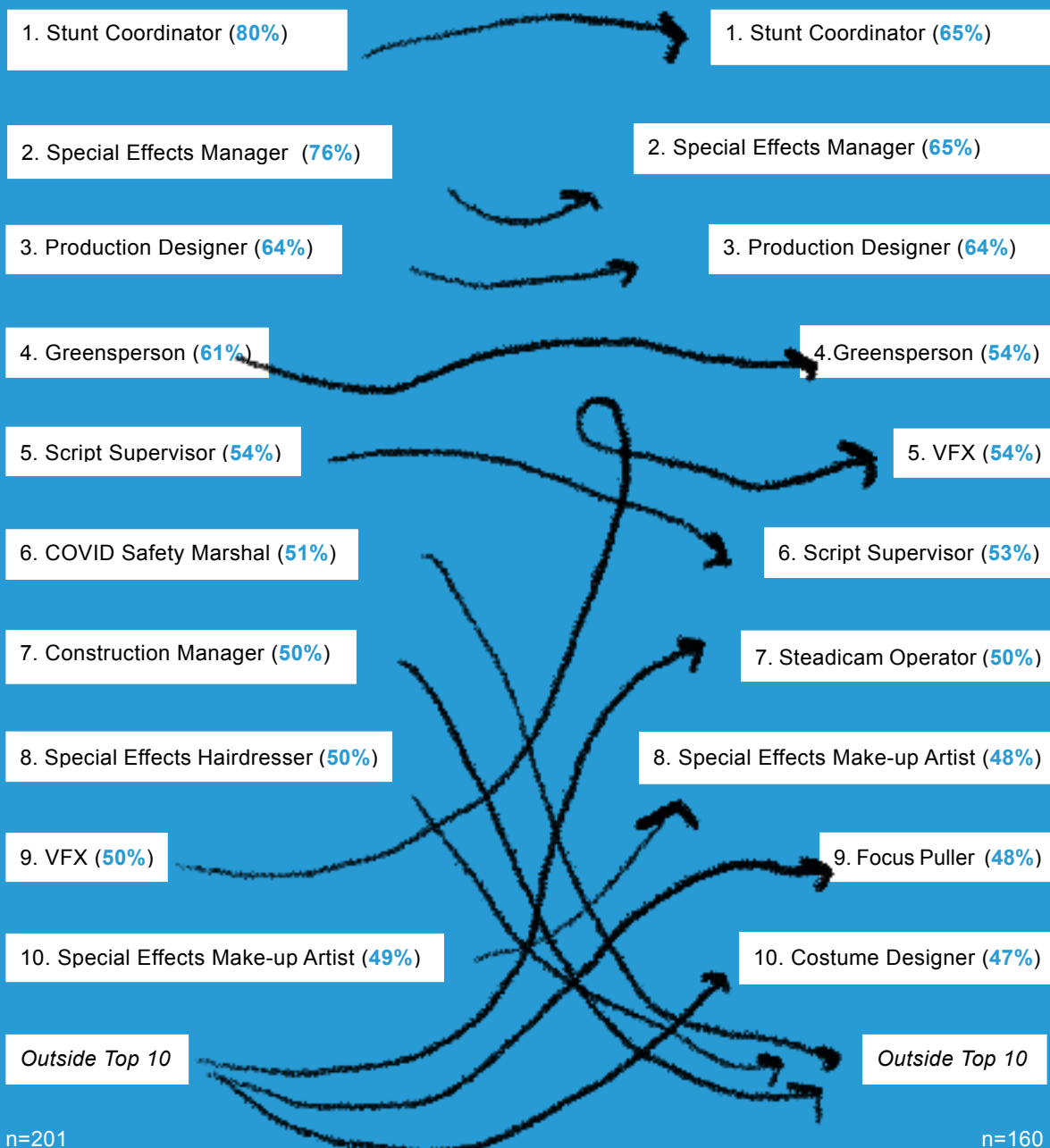
(BAHAMAS + BARBADOS + BOLIVIA + COSTA RICA + DOMINICAN REPUBLIC + ECUADOR + EL SALVADOR + GUATEMALA + HONDURAS + JAMAICA + NICARAGUA + PANAMA + PARAGUAY + PERU + TRINIDAD AND TOBAGO + URUGUAY + VENEZUELA)

TOP 10 BELOW-THE-LINE ROLES

CURRENTLY IN SHORT SUPPLY
(N = 201)

TOP 10 BELOW-THE-LINE ROLES

LIKELY TO BE IN HIGHER DEMAND IN 2024
(N = 160)



BELOW-THE-LINE ROLES IN LEAST SHORT SUPPLY

Painter (12%)
Caterer (12%)
Make-up Artist (7%)
Hairdresser (7%)
Camera Operator (6%)

ADDITIONAL MARKET DATA

Survey responses show, in indicative terms, that the green-spersion is the role currently in highest demand in Mexico. In Argentina, it is the Production Designer. In Colombia, roles related to Visual Effects. In Brazil, where filming was suspended as a result of the pandemic, the most in-demand role is the COVID Safety Marshal.

6. WHAT TRAINING EXISTS IN OUR REGION?

6.1. DOES OUR REGION OFFER TRAINING PROGRAMS FOR AUDIOVISUAL PROFESSIONALS?

Nearly half of respondents reported being aware of training options for below-the-line workers in their countries, whereas the other half reported they were not.

- Nearly half (46%, n = 376 responses) of respondents stated they were not aware of training options for below-the-line workers in their countries.
- 45% said they were aware of these options.
- 9% said they did not know.
- 58% of survey respondents (n = 163) stated that, typically, professional training programs for below-the-line roles are a collaboration between government and private sector. This is reflective of elsewhere in the world.
- Just under a third (30%) stated that such training programs were funded or organized by other types of institutions (e.g., a union).
- Only 11% answered that the government alone organizes or funds such training programs.

6.2. DO EXISTING TRAINING PROGRAMS MEET THE NEEDS OF THE AUDIOVISUAL SECTOR?

Existing professional training programs for below-the-line workers meet “some of the producers’ needs.”

- 71% of respondents stated that existing training programs for below-the-line workers often meet “some of their needs,” while 22% reported that they meet “many of their needs.”
- Only 2% reported that professional training programs for below-the-line workers meet “all of their needs.”

a. **46%**



d. **58%**

“Things are out of balance; in Ecuador, four different universities offer a Bachelor’s Degree in Film, but we lack technicians.”

“It’s important to note that in Colombia, and in Latin America and the Caribbean, a new generation of audiovisual professionals have used self-learning and self-training as tools for professional development.”

“CERTAIN AUDIOVISUAL PRODUCTION ROLES URGENTLY DEMAND BETTER TRAINING... THERE IS ENORMOUS DEMAND FOR THESE TRAINED PROFESSIONALS -PARTICULARLY IN SCREENWRITING AND STORYTELLING- AND THERE IS A SHORTAGE OF QUALIFIED MENTORS CAPABLE OF MEETING THE HIGH QUALITY STANDARDS DEMANDED BY THE RECENT ARRIVAL OF STREAMING [PLATFORMS] TO THE COUNTRY.”



6.3. WHAT DO PRODUCERS RECOMMEND TO DESIGN MORE EFFECTIVE TRAINING PROGRAMS?

Latin America and the Caribbean require a diverse array of training formats and options to address the skill and role gaps and deficits that currently exist in the audiovisual sector.

There was a largely even split across suggested solutions to effectively address current skill and role gaps and deficits. This is not surprising since it is internationally recognized that targeted bespoke training support is more effective than broader interventions.

Two-thirds of respondents (66% n = 358) believe that **in-person training delivered by a third party** would be the most effective solution.

66%

believe that in-person training delivered by a third party would be the most effective solution.

“Education must be imparted in person; below-the-line work is learned through practice, these programs won’t work if taught remotely.”

Other potential solutions to address current skill and role shortages include:

- a. Scholarships to study abroad (64%)
- b. Mentoring, internships and placement programs with on-the-job training (63%)
- c. Informal on-the-job training/support (61%)
- d. Remote/on-line training delivered by a third party (58%)
- e. Long-term in-depth courses with hands-on training (49%)
- f. Quick training/workshops (44%)
- g. Regulations and policies facilitating the attraction of foreign talent (42%)

Respondents shared other ideas including: funding to support production, self-training programs, legislation on worker’s rights and more job opportunities.

“Training should be sustained by up-to-date pedagogic approaches. Teaching-learning in the audiovisual industry should be led by educators with hands-on experience. It’s important to remember that solid professionals are not always good educators.”

TOP 10 BELOW-THE-LINE POSITIONS **CURRENTLY** IN SHORTEST SUPPLY

BY PERCENTAGE OF VALID RESPONSES CHOOSING
THAT POSITION

BRAZIL

1. Covid Safety Marshal (49%)
2. Script Supervisor (44%)
3. Production Designer (37%)
4. Special Effects Manager (37%)
5. Special Effects Make-up Artist (33%)
6. Stunt Coordinator (32%)
7. Safety Supervisor (30%)
8. VFX (30%)
9. Location Scout (26%)
10. Production Accountant (26%)

*Indicative data

TOP 10 BELOW-THE-LINE POSITIONS **CURRENTLY** IN SHORTEST SUPPLY

COLOMBIA

1. VFX (63%)
2. Special Effects Manager (59%)
3. Aerial Camera Operator (51%)
4. Stunt Coordinator (51%)
5. COVID Safety Marshal (49%)
6. Production Designer (46%)
7. Greensperson (46%)
8. Special Effects Hairdresser (44%)
9. Construction Manager (41%)
10. Special Effects Make-up Artist (41%)

*Indicative data

TOP 10 BELOW-THE-LINE POSITIONS CURRENTLY IN SHORTEST SUPPLY

CHILE

1. Stunt Coordinator (70%)
2. Special Effects Make-up Artist (70%)
3. Special Effects Hairdresser (70%)
4. COVID Safety Marshal (70%)
5. VFX (70%)
6. Production Designer (60%)
7. Construction Manager (60%)
8. Production Accountant (60%)
9. Special Effects Manager (60%)
10. IT Security Officer (55%)

*Indicative data

TOP 10 BELOW-THE-LINE POSITIONS **CURRENTLY** IN SHORTEST SUPPLY

MEXICO

1. Greensperson (57%)
2. Special Effects Manager (51%)
3. Production Designer (46%)
4. IT Security Officer (46%)
5. Stunt Coordinator (46%)
6. COVID Safety Marshal (46%)
7. VFX (43%)
8. Steadicam Operator (41%)
9. Construction Manager (41%)
10. Special Effects Hairdresser (41%)

*Indicative data

TOP 10 BELOW-THE-LINE POSITIONS CURRENTLY IN SHORTEST SUPPLY

ARGENTINA

1. Production Designer (75%)
2. Production Accountant (50%)
3. COVID Safety Marshal (39%)
4. Greensperson (36%)
5. Special Effects Manager (36%)
6. Construction Manager (33%)
7. VFX (33%)
8. Script Supervisor (33%)
9. Aerial Camera Operator (31%)
10. IT Security Officer (31%)

*Indicative data

TOP 10 BELOW-THE-LINE POSITIONS CURRENTLY IN SHORTEST SUPPLY

URUGUAY

1. Special Effects Manager (71%)
2. Stunt Coordinator (62%)
3. Steadicam Operator (59%)
4. Production Designer (53%)
5. Greensperson (47%)
6. Aerial Camera Operator (44%)
7. Special Effects Hairdresser (38%)
8. Construction Manager (35%)
9. IT Security Officer (32%)
10. Human Resources Coordinator (29%)

*Indicative data

EXPERIENCES IN AUDIOVISUAL PROJECTS LAUNCHED BY THE ORGANIZATION OF IBERO-AMERICAN STATES

The Organization of Ibero-American States for Education, Science and Culture is an international governmental organization that aims to support development policy in countries within the region through cooperation in the objectives it sets out to achieve. It was created in 1949 and is a leading organization with an important presence in the region, with 17 offices in Latin America, as well as in Lisbon and its central headquarters in Madrid. It develops almost four hundred active projects each year, thanks to multiple partnerships with regional governments, as well as other multilateral bodies such as the Central American Bank of Economic Integration, the Inter-American Development Bank, the CAF - Development Bank of Latin America, the European Union and private entities. The organization understands that objectives can only be met through building partnerships between the public and private sectors, and civil society on a global, regional, national and local level. Within this context, the organization can facilitate interactions between governments and social agents and build collaboration partnerships with businesses, foundations and institutions. Ibero-America has very unequal levels of development on an industrial and professional training level. Save for a few exceptions, audiovisual training programs (public and private) are scarce. More extensive and qualified training options are necessary. The following points are two important considerations that have recently emerged:

- Many teachers in the audiovisual sector do not have the necessary digital skills to provide virtual education. Therefore, training will be needed.
- The digitalization processes have transformed production and the ways of accessing cultural content.

A few important examples of collaboration in the audiovisual sector include:

“Audiovisual Language: A Universe of the Senses” Program (“Lenguaje audiovisual, un universo de sentidos”). This was a partnership between the National Institute of Cinema and Audiovisual Arts (Instituto Nacional de Cine y Artes Audiovisuales - INCAA) and the Ministry of Education, Science and Technology in Argentina. This program promoted joint actions for developing educational programs in which students and teachers, through different activities linked to film, could interact with various types of filmed materials. In this way, the school was connected to the audiovisual universe, teachers were trained in the analysis of this new language and provided with the tools to learn the grammar, codes and mechanisms of cinema for their analytical and creative use in an educational environment. This program was sponsored by Ala/UNILEVER, Villavicencio/Agua

Danone de Argentina. The collaborators were the Organization of Ibero-American States, Film Suez and Hoyts General Cinema.

The direct beneficiaries of the in-person course entitled **“Analysis and Creative Use of Audiovisual Language”** (Análisis y uso creativo del lenguaje audiovisual) were **1,800 teachers** from six of the country's districts. The module **“Audiovisuals as a Classroom Resource”** (El audiovisual como recurso para el aula) reached **2,059,700 students, 7,480 schools and 105,700 teachers** (Argentina, 2005).

The contest “School, Writing, Cinema: Creating Scripts” (Escuela, escritura, cine: elaboración de guiones). Junta of Castille and León together with the Organization of Ibero-American States, within the framework of the **“Program for the Reinforcement of Ibero-American Languages in Education”** (Programa para el fortalecimiento de las lenguas de Iberoamérica en educación). Objective: to stimulate the expression of thinking and emotion among students between 12 and 15 years of age through writing stories and transforming a part of this into a cinematographic script. This project involved around two thousand students. Of these, 50 representatives of educational institutions that had won awards in national contests were invited to the Ibero-American Congress of Languages in Education and Culture (Congreso Iberoamericano de las Lenguas en la Educación y en la Cultura) held in Salamanca, Spain in September, 2012 (Iberoamérica, 2012).

“Youth, Film and Culture: Pantalla CACI” (Los jóvenes, el cine y la cultura: Pantalla CACI). This pilot project focuses on education. The project is part of the Ibero-American Cultural Charter (Carta Cultural Iberoamericana

- CCI). Its main goal is to contribute to the promotion of young people's capacity for analysis, as well as critical and reflexive development through cinematographic language. The project had up to 17,822 students between 14 and 18 years of age. It was implemented in Uruguay and Costa Rica [(OEI and MEP with support from the Costa Rican Center for Cinematographic Production (Centro Costarricense de Producción Cinematográfica) or Film Center (Centro de Cine - CCPC) (**Formerly Pantalla CACI, today Ibermedia Digital**, 2018)].

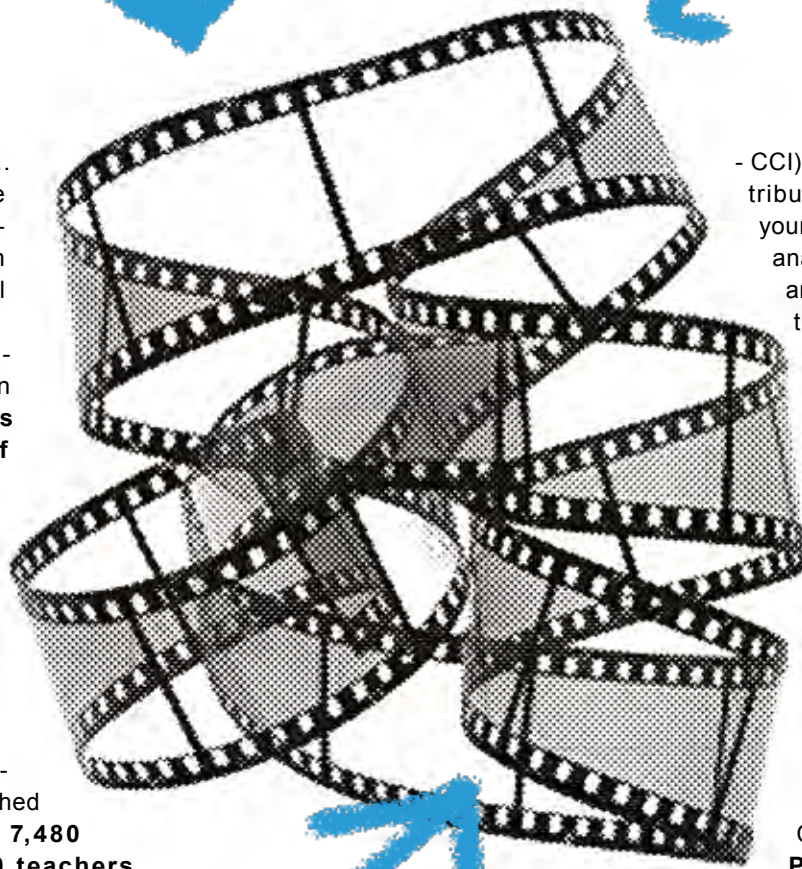
All the aforementioned

programs share the objective of

educating audiences and promoting interdisciplinary work in the educational sphere. They position film and audiovisual arts as objects of study and didactic resources. They **integrate the audiovisual sector into the educational sphere.** One of the most significant components is teacher training.

In the same vein, other programs developed, launched or supported by the Argentinian Ministry of Education (Ministerio de Educación de Argentina) and the National Institute of Cinema and Audiovisual Arts (INCAA) are:

“First Time at the Cinema” (Por primera vez al cine) is a program in which children can attend cinemas across the country free-of-charge, sponsored by businesses within the sector that cover the cost of transportation. There is also a program entitled **“The School Goes to the Cinema”** (La escuela va al cine) for students in middle school, supported by provincial ministries of education and the National Institute of Cinema and Audiovisual Arts. Since 1999, these programs have established agreements with private chains of movie theaters and Argentina's Ministries of Education.



“Film and Education: A Different Way of Reading”

(Cine y educación, una lectura diferente) aims to promote critical reading and audiovisual work within the classroom, seeking to build a bridge between school and film, using pedagogical material created specifically to favor interdisciplinary work. Agreements were established with distributors and national and private movie theaters. The Ministry of Education declared this program to be of educational interest. It was sponsored by the National Institute of Cinema and Audiovisual Arts (INCAA) (Argentina, 2001 to 2007).

REFLECTIONS: FROM THE PRESENT TO THE FUTURE

Ibero-America is a young region with enormous cultural diversity that also has two mutually intelligible languages spoken by approximately 800 million people. Faced with the changes brought about by the pandemic in terms of the consumption of cultural goods, it is increasingly necessary to build an audience educated on what is produced within the region.

In 2021 the Organization of Ibero-American States (OEI) took on the task of examining the impact of the pandemic and preparing the first of ten steps for the reactivation of the cultural and creative industries, stipulated in the document “**Evaluation of the Impact of COVID-19 on the Cultural and Creative Industries**” (Evaluación del impacto del COVID-19 en las industrias culturales y creativas), a joint initiative comprised of Mercosur, UNESCO, IDB, the Ibero-American General Secretariat (Secretaría General Iberoamericana) and the OEI, which addresses “accompanying labor and technological reconversion and updating.” This study allows for the “organization and strengthening of the work and production market by providing tools for the reconversion of activities and professions.” In short, **it is about strengthening the capabilities of workers in the audiovisual industry with ongoing training that facilitates labor reconversion.**

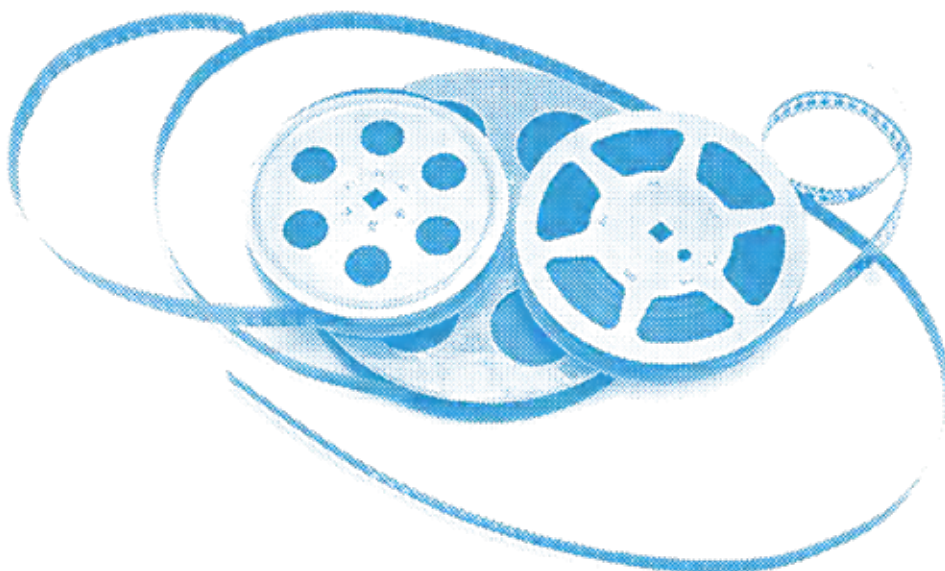
FINAL OBSERVATIONS

The Organization of Ibero-American States has extensive solid experience in the area of training, from ongoing training to post-graduate education. In the specific and broad field of its implementation, it is essential that all stakeholders involved demonstrate commitment. Any education, training, skill upgrading or labor reconversion should be accompanied, supported by and immersed in the extensive world of labor and production that constitutes the audiovisual industry. We must **train within and for the industry.**

Professional education and job training must be designed for change, that is, to provide students with the necessary openness to see and interpret what is different and abandon resources that are no longer valid. Individuals will thus be more inclined to engage in ongoing training and labor reconversion. This situation has become intensified because the audiovisual industry involves technological components in permanent flux, evolution and development.

The element of training aimed at social and vocational education, **for and through work**, must not be neglected. It is a question of training and skill development in order to play a particular role at work, based on basic training and following processes that guarantee the growth of knowledge and abilities for effective professional performance, without neglecting the ethical, social and human dimension.

The need for labor reconversion will lead to designing new virtual courses for workers within the sector, with user-friendly **educational platforms** and high-quality pedagogical resources in pre-production, post-production, special effects, animation, sales and distribution, e-business, marketing and social networks, as well as fundraising for projects, among other fields. Furthermore, **alternatives need to be sought for professional practices and new educational spaces**, such as the creation of programs for public television and other platforms.



IBERMEDIA PROGRAM

Since its creation in 1998, this Ibero-American grant and co-operation fund has provided and received solidarity and support²²⁸ for audiovisual production from its 22 members: Argentina, Bolivia, Brazil, Colombia, Costa Rica, Cuba, Chile, Ecuador, El Salvador, Spain, Guatemala, Italy, Mexico, Nicaragua, Panama, Paraguay, Peru, Portugal, Puerto Rico, the Dominican Republic, Uruguay and Venezuela, and as of 2022, from Honduras, its most recent member. The program works through calls for participation aimed at independent film producers and also by implementing training programs, participating in and promoting selected projects in markets and festivals, and encouraging the integration of an Ibero-American audiovisual space with an emphasis on co-production. Since its creation it has launched 30 calls for participation and funding has been granted for 996 Ibero-American co-produced feature length films, 750 of which have already been released. Furthermore, Ibermedia has helped promote and distribute 283 movies, showcased 298, and provided close to 3,000 training grants. Since the program began, its total contribution has been over \$113 million USD.²²⁹

In its annual report on the 2020 call for participation, it is striking that despite being an atypical year, the members of the program continued making their contributions and that the number of projects presented in the training, co-production and series development categories remained above average.²³⁰

According to the report, “for the first time, the 2021 call for participation included extra points within the assessment criteria for projects led by women, both in the field of direction and creative development, as well as leadership in the primary technical teams.” Often the percentage of projects presented by women in categories such as direction, screenwriting and production is much lower, and as a result so is the percentage of awarded funds. In the call for proposals in 2020, an important step was taken in the area of production: although the number of projects presented by women is much smaller, the number of grants ended up exceeding those for projects proposed by men or mixed groups (53.5% of the funds were granted to women’s proposals as opposed to 32.6% to those submitted by men and 14% by mixed groups, generally a man/woman team).

53.5%

projects led
by women



32.6%

projects led
by men

14%

projects led by
a mixed team



In 2020, the category of series development was first introduced, receiving 7.37% of the funds. Shortly before the global lockdown due to the pandemic, as part of the framework of Ventana Sur, the Latin American film market based in Buenos Aires, Ibermedia formed an alliance with the Blood Window market for fantasy projects, from which they would select one project for co-production, another for feature film development, and one for series development. The final point to emphasize is the implementation of qualitative indicators for the evaluation of participating projects: the narrative structure and quality of the technical team were already granted points during the selection process, and from now on the use of indigenous languages and a gender perspective also grants points.

²²⁸ Programa Ibermedia, *El programa* (n.d.). <https://www.programaibermedia.com/el-programa/>

²²⁹ Reporte Anual Convocatoria 2020, Programa Ibermedia, Unidad Técnica [2020 Annual Report on the Call for Applications, Ibermedia Program, Technical Unit].

²³⁰ Reporte Anual Convocatoria 2020, Programa Ibermedia, Unidad Técnica [2020 Annual Report on the Call for Applications, Ibermedia Program, Technical Unit].

CONVERSATION WITH THE IBERO-AMERICAN FEDERATION OF CINEMATOGRAPHIC AND AUDIOVISUAL PRODUCERS

The Ibero-American Federation of Cinematographic and Audiovisual Producers (Federación Iberoamericana de Productores Cinematográficos y Audiovisuales) brings together audiovisual workers and producers from 18 different countries. We spoke with Adrián del Solar, president, Ignacio Rey, vice-president, and Diego Ramírez, vice-president, about their diagnosis, as producers and educators, of a region that more than ever is seeking to build an industry.²³¹

ON CURRICULA IN LATIN AMERICA AND THE CARIBBEAN

Ignacio Rey: We need to work to adjust curricula to the new reality of producing and consuming audiovisual works. Changes to university curricula tend to involve long administrative processes. Both public and private film schools can make modifications more swiftly, although most of them are unable to change the curriculum from one year to the next. Therefore, it would be useful to develop complementary workshops that can be delivered without the need of modifying the curriculum. These workshops should have very specific objectives to address the main shortcomings and needs of every country, and should be delivered by educators with professional experience.

Adrián del Solar: Yes, it's true that film schools will always lag behind, because from the moment a young person begins to study cinema to the moment they graduate, everything has already changed.

Diego Ramírez: In Colombia vocational schools, rather than formal education, have gained strength. They are very flexible with subject matter and hire professionals from the industry as teachers, and they are oriented towards people who have already graduated and have knowledge regarding the business.

Adrián del Solar: We must train good editors, good cinematographers, good costume designers, good art directors, who in the long run will have much more work in the audiovisual industry than a film director. Some film schools are created to train artists, but we have to train people to build an industry, and that's an art too.

VISUAL EFFECTS AND ANIMATION

Ignacio Rey: Latin America needs to invest heavily in the development of animation and visual effects (VFX). Since animation is a genre mostly aimed towards children, we should work with the objective of creating centers where this activity can proliferate, generating new artists and giving them the necessary knowledge and tools. Systems promoting regional development through the use of funds, subsidy programs, tax benefits, etcetera, must be generated to incentivize the production of animated shorts, series and feature films that portray our stories. Visual effects, for example, are being used more and more in films and series. They are no longer just a resource for large-scale productions, but a fundamental tool to complete the narrative of any kind of story. Latin America is a territory full of talent that we must incentivize and train.

231 Adrián del Solar, Ignacio Rey and Diego Ramírez, personal communication (March 15, 2021).

“WE MUST TRAIN GOOD EDITORS, GOOD CINEMATOGRAPHERS, GOOD COSTUME DESIGNERS, GOOD ART DIRECTORS, WHO IN THE LONG RUN WILL HAVE MUCH MORE WORK IN THE AUDIOVISUAL INDUSTRY THAN A FILM DIRECTOR. SOME FILM SCHOOLS ARE CREATED TO TRAIN ARTISTS, BUT WE HAVE TO TRAIN PEOPLE TO BUILD AN INDUSTRY, AND THAT’S AN ART, TOO.”

ADRIÁN DEL SOLAR





HOW SMALL-SCALE PRODUCTION COMPANIES CAN ACCESS LARGE-SCALE PLATFORMS

Adrián del Solar: I am concerned that the large-scale platforms may create a very clearly marked class society in Latin American audiovisual productions, because they always prioritize working with large, established businesses, and many others may end up excluded.

Ignacio Rey: To make it possible for independent production companies and new talent to access large-scale platforms, it would be important for these platforms to make explicit their production, post-production and administration standards, so that independent businesses who wish to develop and produce content with this objective in mind can adapt and train.

ALTERNATIVES TO INCENTIVES

Adrián del Solar: Why must we always generate investment or incentives to attract foreign productions so that they film and invest in our countries? Mechanisms must exist that incentivize private investment in local businesses, because this is how we will strengthen domestic production.

Ignacio Rey: One of the things that could be most helpful is a society of reciprocal guarantees, on a regional or local level, which operates like a tool that allows for the guaranteeing of credits or discount agreements.

NEW WAYS OF WORKING

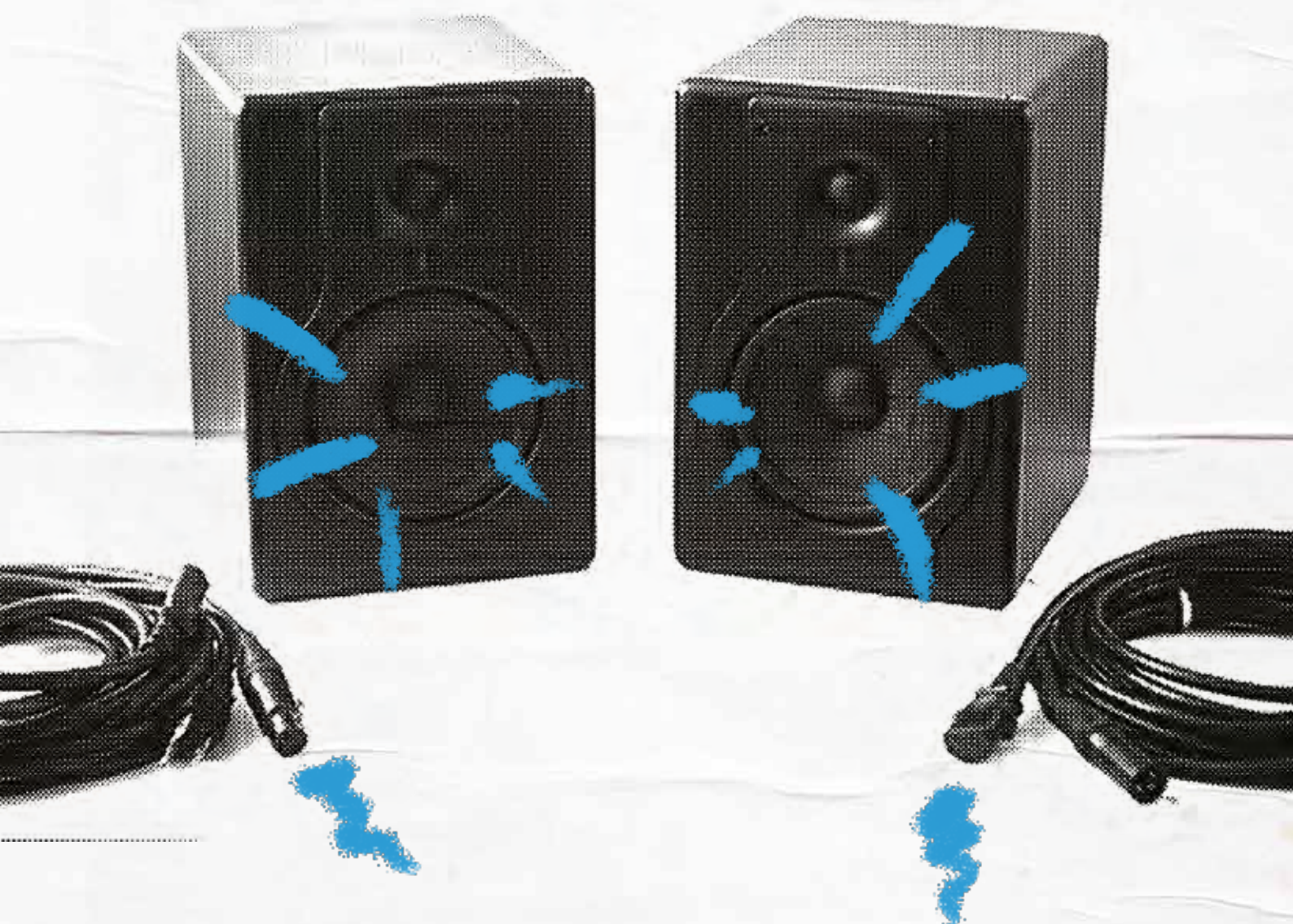
Diego Ramírez: Here in Colombia, screenwriting was mostly carried out individually; the responsibility of writing within a project was entirely taken on by one person. We are now undergoing a very active transition in which writers' rooms are being set up, which creates a great deal more efficiency in these creative processes.

OTHER CHALLENGES

Adrián del Solar: Co-production agreements demand the technical and artistic participation of the co-producing country. This implies transporting actors, technicians, and often camera and sound equipment, and the subsequent transportation of the hard drives to the country in which image or sound post-production will be carried out. Very often customs regulations are excessively bureaucratic and the equipment is withheld for so long that production companies suffer significant losses. Besides, the conditions for obtaining work permits for actors and technicians coming from a co-production company vary from country to country, and delay or hinder production schedules. Therefore, it is necessary for the regulations surrounding the admission of filming equipment to become more flexible and ensure more freedom of movement for the technicians and actors participating in these co-productions. This freedom of movement for workers already exists in Europe, so perhaps this is a model to emulate.

NEW WAYS OF UPDATING SKILLS

Ignacio Rey: In 2014, the Argentinian Chamber of the Cinematographic Industry (Cámara Argentina de la Industria Cinematográfica) organized an unprecedented meeting: all members were invited to a three-day event in a hotel on the outskirts of Buenos Aires. The idea was to generate a space for members to reflect on their activities and listen to each other explain how they envisaged a film, how they accessed funding, how they undertook the development of a project, or how they managed distribution. It was a kind of workshop carried out among production companies. This meeting worked very well, because we all learned something from each other and many good ideas came up about how we could contribute to the industry as a whole. This initiative could be replicated in other countries on a regional level in order to generate a unique exchange between colleagues.



CHAPTER 4

JOBS IN DEMAND WITHIN THE INDUSTRY

A BELOW-THE-LINE FUTURE

A CONVERSATION WITH A SOUND ENGINEER, AN ART DIRECTOR AND AN EXPERT IN FILMMAKING EQUIPMENT

BECAUSE YOU WERE INTERESTED IN:
*skills, technical work, education, new
jobs, entrepreneurs*

There exists a secret warp and weft in the audiovisual arts which, like the work of a good tailor with a perfect stitch, is not usually visible to the naked eye. Behind every audiovisual production there are countless professions that nurture the industry's dynamism while making sure that each part of the final piece is perfect. We spoke with three experts in below-the-line professions who carry out their jobs far away from the glamour, where technical precision is necessary for films and series to achieve excellence. When this work is carried out properly, it goes unnoticed, but when a mistake is made, it shows and the viewers are the first to point it out.

THE SOUND ENGINEER

Axel Muñoz Barba is a professional Mexican sound engineer with more than ten years of experience. He was in charge of the sound in *La casa de las flores* (*The House of Flowers*) and in the mini-documentary series 1994 (both Netflix original series). In 2019, he made his debut as a director with the feature film *Noches de Julio*.

"Schools like the National School of Cinematographic Arts (Escuela Nacional de Artes Cinematográficas), formerly the CUEC, and the CCC, where I studied, train you to do everything in terms of audiovisual production. In theory, I know cinematography, I know how to expose film, but when you specialize you focus on direction or cinematography. I was always interested in directing, but you have to make a living somehow." Axel says that he found working in sound easier and he enjoyed it, too. Besides, in film schools there are always opportunities to work on short films and student theses, and get experience that way. "I had been at this school for four years and had worked on two feature films as a sound engineer, which I did using school equipment, so I didn't have to buy it, which is a problem that photographers don't face [since they're not expected to buy their own equipment]," says Muñoz.²³²

“We sound engineers are the only people on the set who are a hybrid of business and heads of department; thus we provide services and supplies. And if you’re going to offer this, you must go into debt buying equipment and making large single payments, without the opportunity to get credit like in the United States. What would benefit the industry a great deal would be the easing of many customs restrictions, because sometimes for sound engineers it’s cheaper to take a flight to Los Angeles or New York, pay for a night’s stay and bring equipment home, than to risk ordering it to your house and getting charged surprise costs.”

Muñoz says that despite the risks involved in owning your own equipment, the fact is that work opportunities arise “on the basis of proven experience,” meaning that it is much easier for sound engineers to find larger projects if they have the right experience and are capable of taking on the challenges and technical guidelines of any director or platform. Like in any profession, he says, the most important thing is one’s level of specialization. In short, what really matters is how good you are at what you do.

THE PRODUCTION DESIGNER

Liz Medrano is a Mexican production designer and art director. She has worked on local productions such as *Te prometo anarquía* (2015) and *Noches de Julio* (2019), on the original series *Paramédicos*, produced by Canal Once, and on the production of *No Man’s Land* (2020) directed by Conor Allyn.

“I graduated in museum studies and art curation. Films made a real impact on me, as they do on everyone, ever since I was a little girl and I was taken to see matinees, but you never stop to think about who is making those films, all the professions behind them. I was always very interested in the history of cinema because of how complete it is and because it involves all of the fine arts, from color theory, editing, architecture, the visual arts, acting and even anthropology, sociology, the construction of characters, giving them personalities using objects and personal spaces... I fell in love with the profession because of the speed at which you have to resolve everything. I loved learning things I had never dreamed of, such as building work, making walls *ipso facto*, textures and how to compose with the camera in mind.”²³³

Liz Medrano started working in short films with friends and that is how she started learning about the profession.

“I started knocking on doors and followed my path as a decorator, first as a decorating assistant, then as a set designer and also as an art director. I still have battle wounds from *Salvando al soldado Pérez* (2011), from burning fabric and dressing camels on the dunes of

Torreón, which we made look like the Saharan Desert.”

Liz explains that from then on, she was interested in auteur projects, like *Noches de Julio*, directed by her husband and colleague, Axel Muñoz. “I think I am capable of doing anything; I’ve done horror (*El exorcismo de Carmen Farias*, 2021), I’ve done Westerns, children’s films, contemporary... I would love to do a crime or police story, and if anyone were to ask me to do a romantic comedy, I could do that, too. I was involved in what some critics have considered one of the best films in Mexican history, *Te prometo anarquía*, and I had some control over the small budget we had, I intervened the Mercado de Jamaica and several streets; with my crew we painted the mural of the *sonidero* (popular concert hall) *La Changa*. You should have the same aesthetic rigor and control over a medium-sized project as you would with a gigantic one; there are no small or big films, and those of us who survive here do so because we genuinely love this profession.”



THE EQUIPMENT OPERATOR

The operation of filming equipment, as expensive as it is sophisticated, is a profession that requires skill. This is where Carlos Congote comes in. He studied film in the United States and returned in 1982 to his home country, Colombia, to start a production company and an equipment rental business. Congo Films is not only one of the most important audiovisual equipment providers in Latin America, with a distribution office in Chile and clients across the entire region, but has also identified a basic need within the industry: a school for trades, operators and below-the-line workers.

The Congo Films school came into existence three years ago, although courses have been taught for two and a half decades. Carlos Congote says, “Universities are focused on training directors without bearing in mind that it will take most of them many years to get to the top. Ours is a hands-on school where we capitalize on the large amount of equipment we have: the three studios we built, mixing, Foley and post-production rooms, as well as art workshops, in order to train people as if they were producing in the real world.”

The school resorts to the technical capacities of Congo Films, which has an enviable range of equipment and has begun to work in virtual production, a service that is still uncommon in Latin America. Congote says that this is an extremely practical, hands-on school that imparts short and intensive courses, from 8 to 12 hours a day, which students graduate from with key professions ahead of them: “Camera operators must be trained to check, update, handle and repair cameras, and this is why they are so difficult to find,” he concludes.



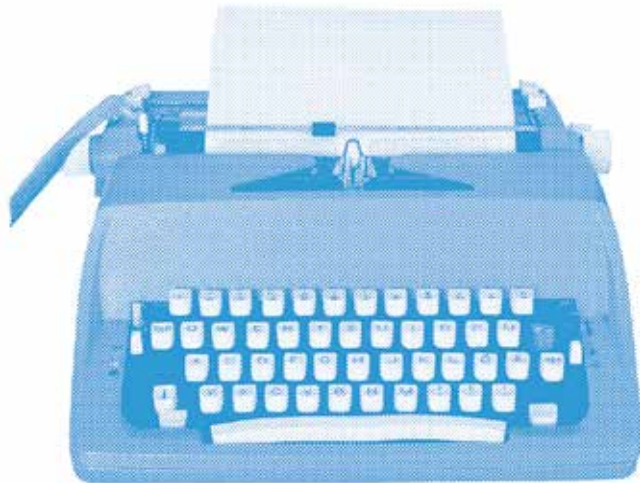
IF LATIN AMERICA HAS SUCH A STRONG LITERARY CULTURE, WHY IS IT SO DIFFICULT TO FIND SCREENWRITERS?

BECAUSE YOU WERE INTERESTED IN:

skills, education, new skills, series, screenwriting, writing

Syd Field, a screenwriting teacher and author of a pioneering bestseller on the subject, claimed that he looked at two thousand scripts for Cinemobile, the studio behind *The Godfather* (1972), and decided only forty were good. In other words: 99% of the scripts that passed through his hands were not of the required standard for his production, which in those days, would have implied an investment of at least a million dollars.²³⁴

A script, says Field, is a story told through images. Mauricio Cadena, director of film dissemination of Ecuador, adds: "Everything begins with a good story: you can have all the money in the world, make a huge co-production effort, but if your story is no good, you won't get very far."²³⁵



Screenwriting is a skill that exemplifies the changes in the audiovisual industry in recent years: if nothing is older than language, why do so many professionals in the audiovisual sector in Latin America insist that there are not enough screenwriters? Towards the end of the 20th century, it was almost impossible for a professional screenwriter in Latin

America to avoid working in telenovelas in one way or another. "I think telenovelas are one of the most interesting things in this world, a very rich universe that is constantly mutating into new forms," says Alonso Ruvalcaba, writer and producer of the Amazon Prime Original series, *Pan y Circo*, who began his career reviewing telenovela scripts for TV Azteca.²³⁶

²³⁴ Syd Field, *El libro del guion. Fundamentos de la escritura de guiones. Una guía paso a paso, desde la primera idea hasta el guión acabado*. Madrid: Plot Ediciones, 1979, 9.

²³⁵ Mauricio Cadena, personal communication (November 27, 2020).

²³⁶ Alonso Ruvalcaba, personal communication (October 13, 2020).

The writers we spoke with about this subject all agreed that the main school to learn screenwriting was actually the major television conglomerates; whereas in independent films, directors tend to develop their scripts independently. In recent years, however, as demand for less melodramatic audiovisual content grows, there is a greater need to train writers capable of creating scripts with strong protagonists and not necessarily with a plot that can stretch out for hundreds of episodes.

"In contemporary series, what we are looking for are character drivers," explains Linda Díaz Pernia, business partner of El Calefón and director of the company's premium television department. "A character with such a huge and powerful objective will do the unimaginable to achieve it, that is what drives the plot. In contrast to the melodrama of telenovelas, where the protagonist is secondary to the context, in this case the character is what makes everything happen," she adds.²³⁷

Augusto Mendoza began his career writing comic sketches for *La Familia P. Luche* produced by the Mexican comedian Eugenio Derbez. After taking a screenwriting course in the Mexican Cinematographic Training Center (Centro de Capacitación Cinematográfica de México), Mendoza discovered his calling and today his name is attached to films such as *Chicuarotes* (2019) and *Abel* (2010), as well as original Netflix productions such as *Diablero* (2018) and *Todo va a estar bien* (2021). "I think a large part of the profession is learned on the job. With Derbez, I had to write scripts from one day to the next, and that taught me how to complete things, but above all it taught me that I was capable of doing it, because you can get into a situation where you have no ideas, or where you need more time. Sometimes in production you have to rewrite a lot, because there was some kind of issue with the actors or the locations, and you have to learn to work under pressure, in the moment."²³⁸

NEW SCREENWRITING MODELS IN THE AGE OF STREAMING: THE WRITERS' ROOM

"For a long time, we only had writers who were used to doing things the old way and we never evolved towards character development as a form of narration. Today, we have an increasing number of young people who better

IN RECENT YEARS, HOWEVER, AS DEMAND FOR LESS MELODRAMATIC AUDIOVISUAL CONTENT GROWS, THERE IS A GREATER NEED TO TRAIN WRITERS CAPABLE OF CREATING SCRIPTS WITH STRONG PROTAGONISTS AND NOT NECESSARILY WITH A PLOT THAT CAN STRETCH OUT FOR HUNDREDS OF CHAPTERS.

understand the new narrative form, but lack experience," says Epigmenio Ibarra, a founding partner of Argos Communication.

Part of this discrepancy is due to the fact that screenwriting in Latin America has still not completely adapted to contemporary productions' proven models for new formats, such as series. In these narrative forms, the role of screenwriting for the most part is no longer the work of the lone genius, but rather is now a collaborative process: a text that passes through many different hands and goes through even more cuts; a group exercise, a communal task. Writers no longer work on their own; instead, the work usually takes place in a writers' room.

"The writers' room model is a tried and tested system and 99% of the series from the United States are written this way, unless you have a total genius at the center like Peter Morgan, screenwriter of *The Crown* (2016) or Julian Fellowes of *Downton Abbey* (2010). But this is a very British way of making television, whereas in the collaborative format, the screenwriting is rotated; you get a lot of

237 Linda Díaz Pernia, personal communication (November 24, 2020).

238 Augusto Mendoza, personal communication (October 13, 2020).

notes from the showrunner and other writers,” says Daniel Krauze, one of the screenwriters of *Luis Miguel: la serie* (2018), the first season of which broke Spanish-language audience records on Netflix when it was released between April and July of 2018. Krauze studied his MFA in Dramatic Writing at New York University, and worked in journalism and literature for years before ending up in a writers’ room. “Claiming authorship for writing an episode of a TV show always makes me feel uncomfortable, because in reality it’s the work of so many people,” says Krauze. In fact, he sees television writing as an example of collaboration.²³⁹

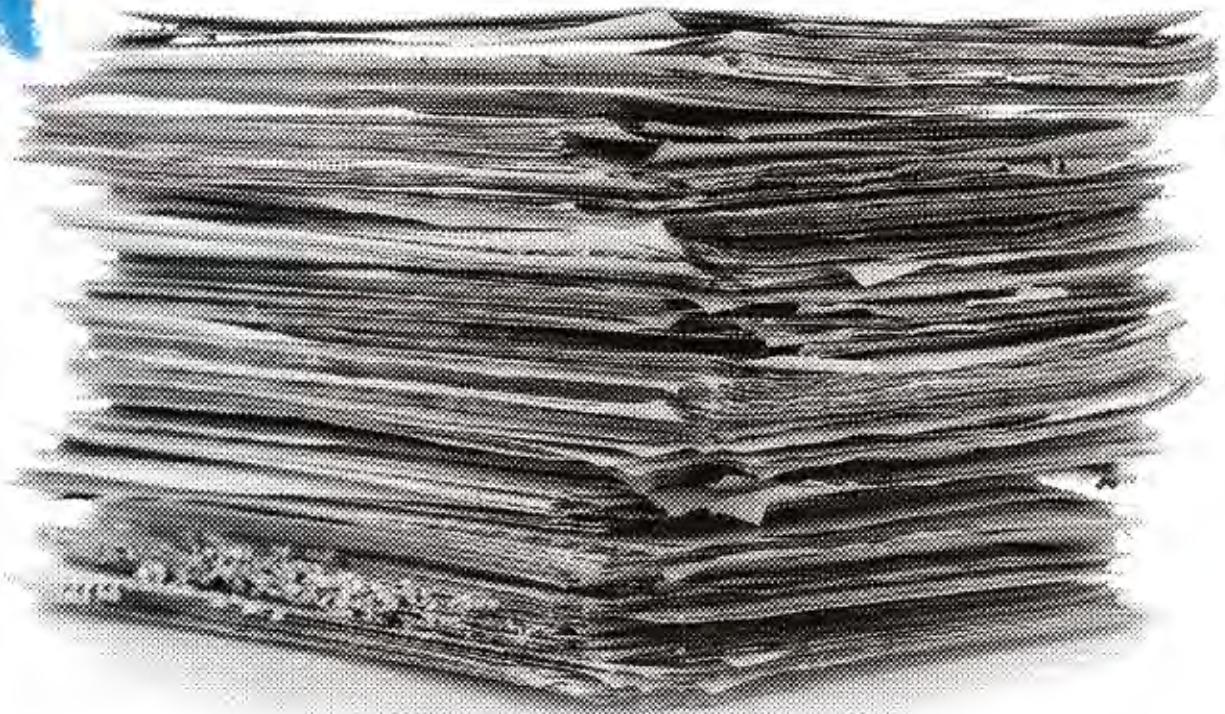
“We were six people in the writers’ room, because *Luis Miguel* was a complicated script to write. I’m not talking about external factors; I’m talking about the actual plot, structurally, with its two separate timelines,” says Daniel, who after participating in *Luis Miguel: la serie* has taken part again in the writers’ room set up in the productions of *Un extraño enemigo* (*A Strange Enemy*, 2018) and *El candidato* (*The Candidate*, 2020), both from Amazon Prime Video.

From Colombia, Natalia Santa is an experienced screenwriter and film director. She has written and revised series and telenovelas such as *Verano en Venecia* (2009), seasons of *Plaza Sésamo* (*Sesame Street*), series for Netflix such as *Frontera Verde* (2019), *Historia de un crimen: Colmenares* (2019) and *El robo del siglo* (2020). She is the first Colombian director to participate in an official selection at the Cannes Film Festival with her directorial debut *La defensa del dragón* (2017). Although her first passion was literature, “it was in film and television that I found a space, a clearer form of expression for the stories I wanted to tell.”²⁴⁰

Daughter of the veteran Colombian telenovela screenwriter Fabiola Carrillo, Natalia Santa grew up surrounded by women screenwriters, playwrights and journalists; among them was Mónica Agudelo, co-author of *Señora Isabel* (1993), which Argos adapted in Mexico as *Mirada de Mujer* (1997). “I think there is common ground between all kinds of narratives, written or audiovisual, which is the creation of characters: A solid character with motivations, a conflict and an arc. But the structure does change: a telenovela with 240 half-hour episodes, a mini-series of six 40-minute episodes and a two-hour film script are all very different things.” Any previous education and training in the subject is crucial.

Santa explained how her first experience in a writers’ room took place in Bogotá, for the series *Frontera Verde*. She confessed that the method initially seemed unusual. It was several weeks of work with Colombian and foreign screenwriters—among them Gibrán Portela and Javier Peñalosa from Mexico, and Mauricio Leiva-Cock from Colombia—some of them more familiar with television, others with films or series. It was her first exercise in this model of collaborative writing, and she admits that in the end it was “lots of fun.”

Although Natalia Santa has since participated in the screenwriting for new series such as *Historia de un crimen: Colmenares* and *El robo del siglo* (both from Netflix) and *Ruido capital* (2020) from Movistar+, the writer insists that more training is imperative: “There are very few of us screenwriters that have done series and we need training and workshops, a school where you can learn to structure and narrate these new formats.”



239 Daniel Krauze, personal communication (October 16, 2020).

240 Natalia Santa, personal communication (October 29, 2020).

DRAWING REALITY: VISUAL EFFECTS (VFX) IS A GROWING SECTOR

BECAUSE YOU WERE INTERESTED IN:

*skills, industry, visual effects, Mexico, Uruguay, Chile,
new skills, incentives*



Since the origins of film, creators have been searching for ways to bring the impossible to celluloid: when they discovered the green screen, filmmakers used it like a canvas upon which they could project cities, landscapes and even imaginary worlds. Visual Effects (VFX) are an extension of the desire to enthrall the human eye with the imaginary: they are animations superimposed on filmed images. They allow us to watch how a colorful monster flattens a city's buildings, how a meteorite shower falls onto scrubland or how an otherworldly ghost appears. But they are also used to add detail to more modest elements that often go unnoticed: steam floating above a hot cup of coffee, snowflakes falling from the sky or flashes of light coming from a cityscape at night. These kinds of elements are often added as a part of visual effects work in post-production.

With the help of constantly evolving software, visual effects are drawn on top of a moving image, and in recent years, the discipline has become even more essential: it is cheaper to draw an explosion than to blow up a building and film it. But, to offer these services, a business must have technical knowledge and software experts, which are not always easy to find in our region.

With the growth of audiovisual production, the demand for visual effects has increased to such an extent that there are now very few films or series that do not require them. Super-productions depend on them, and it is estimated that 12.5% of a super-production's budget (projects with budgets over \$220 million USD) is destined to visual effects.²⁴¹ It is estimated that the value of this industry together with the animation industry grew to \$156 billion USD in 2020, and that it will grow to \$172 billion USD in 2025.²⁴² According to statistics from Zion Market Research, the global market for visual effects grew at a rate of 11.4% before the 2020 pandemic, and in 2018 it was already worth \$11.33 billion USD per year. Asian countries, India in particular, are becoming the new centers of power when it comes to services related to visual effects such as match moving, the process in which computer-created graphics are inserted while a camera movement is tracked within the shot. But where does that leave our region, which has spent years creating an animation industry in various countries?

²⁴¹ Olsberg SPI, *Global Screen Production*, 26.

²⁴² Mordor Intelligence, "Animation and Vfx Market - Growth, Trends, Covid-19 Impact, and Forecasts [2021 - 2026]" (2020). <https://www.mordorintelligence.com/industry-reports/animation-and-vfx-market>

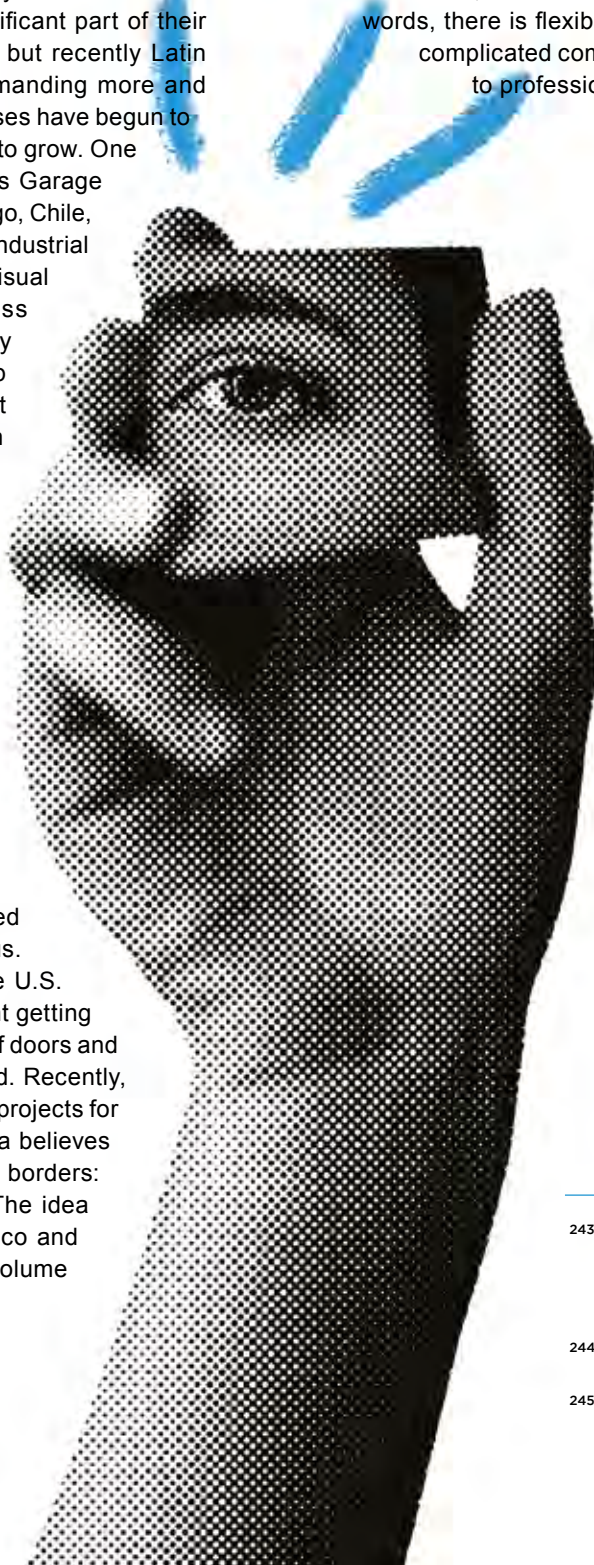
Historically, the visual effects industry has been concentrated in reduced number of markets. Vancouver, London and New Zealand are some of the main hubs of this industry. This is due to the fact that these places have offered two things: a pipeline of animators from prestigious schools such as the Vancouver Film School, and incentive programs which make them competitive despite the high labor cost. For example, a production that sources its visual effects from a company in New Zealand can opt for a rebate between 18% and 20%, depending on the project's total budget.²⁴³

In Latin America, however, there are some companies dedicated to visual effects that work beyond their national borders. Until a few years ago, a significant part of their work was for television commercials, but recently Latin American productions have been demanding more and more visual effects, and these businesses have begun to meet this demand, which will continue to grow. One business that stands out in this field is Garage VFX, founded by Tomás Roca in Santiago, Chile, more than twenty years ago. Roca, an industrial designer and trained artist, says that visual effects began to be a viable business in Chile when the price of technology (computers and software) began to drop at the beginning of this century: "At that moment, the importance of the person behind the machine was no longer a technical issue: they needed to be artistic."²⁴⁴

During the first few years of his career as a special effects animator, the work was mainly in advertising, but as time passed and Chilean cinema became more prominent on the international stage, opportunities came up to collaborate on movies such as *Neruda* and *Jackie*, both by the director Pablo Larraín. "In Chile, we offer a higher quality of work, which is why we can gain access to projects. We realized that there is a niche in the United States that we can reach," Roca tells us.

For him, making headway in the U.S. market has not been easy: it has meant getting on a lot of airplanes, knocking on a lot of doors and trying his luck. But the strategy worked. Recently, Garage VFX has worked from Chile on projects for Amazon Prime Video and Netflix. Roca believes it is important to look beyond national borders: "We have to reach larger markets... The idea is to have partners in Colombia, Mexico and Argentina, in order to attain greater volume and strategic presence."

In Uruguay, we spoke with Alejandro Damiani, a business partner in Aparato, a production company that offers visual effects as part of their portfolio. Although Uruguay is a technologically advanced country with a high level of education, Damiani describes a limited talent pool compared to other Latin American countries: "We are all-rounders... It is very difficult to become a specialist in such a small market. You have to do a bit of everything. That's how Uruguay started out: three people can do something that would take 10 or 15 people to do in another country. At the same time, when you want hyper-premium quality; for example, an animal with fur or hair, we aren't at that standard."²⁴⁵ In other words, there is flexibility, but less specialization: a complicated combination for a country looking to professionalize and grow an industry.



²⁴³ Olsberg SPI, *Global Incentives Index 2019 World of Locations* (2020). <https://www.olsberg-spi.co.uk/wp-content/uploads/2019/05/Olsberg-SPI-Global-Incentives-Index-May-2019.pdf>

²⁴⁴ Tomás Roca, personal communication (November 5, 2020).

²⁴⁵ Alejandro Damiani, personal communication (November 6, 2020).

Damiani also regrets the fact that finding talent for his industry is not simple, “The schools here are teaching things that are obsolete. I have seen work from fourth year university students that doesn’t meet the expected standard,” he says. He agrees that a great part of the learning is self-taught: many of his young artists learned the basics of their profession not at school, but on the internet—another characteristic of an emerging industry.

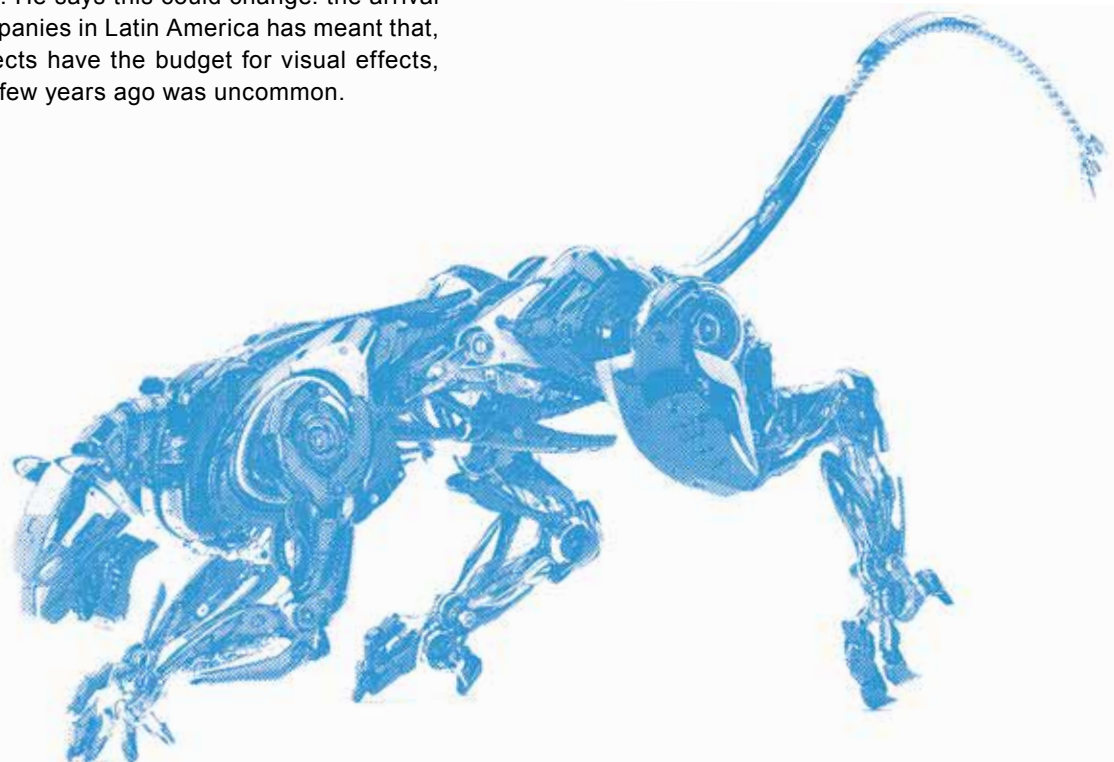
Streaming companies have taken note of this difficulty. Paulina Salazar, manager of visual effects for Netflix in Latin America, says that VFX and virtual production are key development areas in the entertainment industry. “In Mexico, for instance, we estimate that our investment in visual effects will multiply by four in the next five years. At Netflix, we have a team that is exclusively dedicated to supporting the healthy growth of the visual effects and post-production ecosystem. As part of this work, we collaborate with partners within the industry to develop emerging talent and technology in the region, and attract highly qualified professionals who work abroad so that they come home and start their own businesses.”²⁴⁶

Alejandro Diego von Dorrer is the CEO of Ollin VFX, one of Latin America’s largest visual effects companies, which has its headquarters in Mexico City. Ollin has more than sixty full-time artists, and the company expands or contracts the workforce depending on the size of projects, which have included Hollywood super-productions such as *Suicide Squad* and *Jumanji*, as well as the Netflix series *House of Cards*. For years, Ollin’s client portfolio came exclusively from abroad, and today, according to von Dorrer, 95% of the business’s services are for projects in the United States. He says this could change: the arrival of streaming companies in Latin America has meant that, finally, local projects have the budget for visual effects, something that a few years ago was uncommon.

Despite there being a higher demand for services, von Dorrer reports various difficulties; among them, that local production companies still do not know how to budget for them correctly. However, perhaps the more serious complication is that despite labor costs being lower in Mexico, incentives in countries like Canada—which can reach up to 35% of the cost incurred—limit the possibilities of competing. “I think we are a relatively successful company... I am very proud of the work we have done, but I think a company like ours, after 20 years, should have become much larger.”²⁴⁷

Von Dorrer does not believe that this is a matter of a lack of talent—the animators that are trained at Ollin often end up getting recruited by their competitors in Canada— or a lack of capital that hindering their growth. “If you were to tell me, here’s two million dollars to make Ollin grow, we could invest that, but at the end of the day, the challenge is in getting clients to give us the job, but it’s very difficult to compete with other countries without a local incentives program.”

Being a profession that combines creativity and technology, in a region where demand for services is growing, the development of a visual effects industry could be a unique opportunity. But it will not be easy: as well as training talent, it is essential to think about new ways of competing with the established centers that have been working within the industry for years. The effort must involve legislation, training and the creation of new strategies so that post-production in general can take on a more important role in the region. This is probably not something that can happen overnight, but any country that really assumes the challenge will have an interesting opportunity ahead of them.



²⁴⁶ Paulina Salazar, personal communication (June 13, 2021).

²⁴⁷ Alejandro Diego von Dorrer, personal communication (November 9, 2020).

“WHY NOT TEACH THE NEIGHBORHOOD KIDS?” HOW TO TAKE THE LEAP FROM GUATEMALA TO HOLLYWOOD AND BACK AGAIN

BECAUSE YOU WERE INTERESTED IN:
*Guatemala, skills, technical work,
education, VFX*

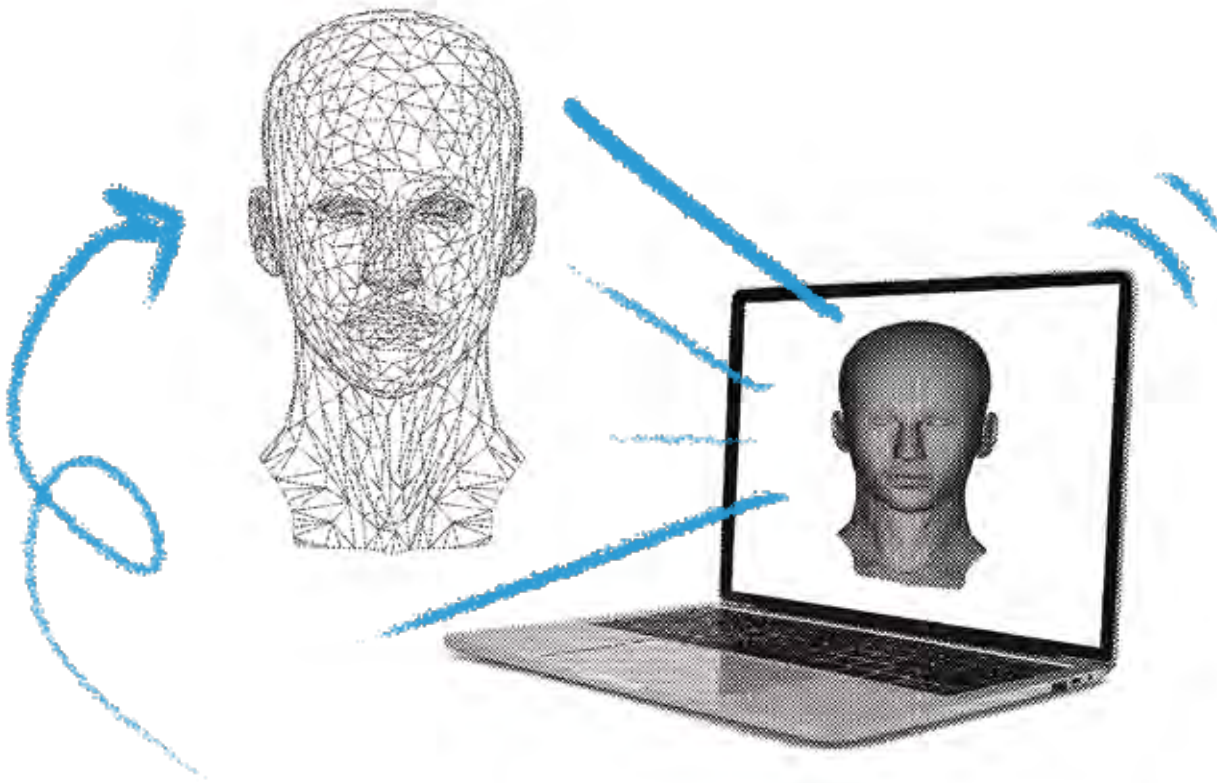
* *Carlos Argüello spoke with the team of this publication on September 20, 2020. Sadly, he passed away a few months later, on June 23, 2021. Carlos leaves a valuable professional legacy, as well as an example of real commitment to young people. His vision will be of key importance to continue building a robust audiovisual industry in Latin America and the Caribbean.*

Contemporary cinema is a dream made reality thanks to visual effects, or VFX, born from the union between animation and technology. Think about the most stunning images from cinema in the 1990s: the explosion of an asteroid in outer space in *Armageddon*, the fantastical worlds of the *Chronicles of Narnia*, the sinister black and white clips in *The Ring*, the game of the century between a flesh and blood Michael Jordan and the animated cast of the Looney Tunes in *Space Jam*. Behind these multi-million dollar productions, which won awards for their special effects and made huge leaps forward for the seventh art, is the digital paintbrush of Carlos Argüello*.

Argüello was born in Managua to Nicaraguan parents and grew up in Guatemala, where he became interested in painting from a very young age. He insists that he was not very good at school and struggled with early dyslexia, two elements that potentially drew him towards the technical possibilities of computers, inaccessible back then. He studied architecture and graphic design, but soon understood that his chances of working in that field were negligible, and decided to migrate to the San Francisco Bay Area.

Argüello joined the San Francisco Academy of Art and was soon offered a sought-after internship at NASA, where he worked without pay for months creating scientific visualizations and 3D graphics. “I was happy because I was using a computer,” says Argüello. “NASA became my entire world because what I wanted was to see my paintings in 360 degrees, to step into the worlds I was dreaming.”²⁴⁸ He was the only artist in an environment dominated by scientists and engineers, whom he had to teach how to react to this new technology before it became interactive and when everything had to be done via programming.

248 Carlos Argüello, personal communication (September 10, 2020).



What came next was a career in which Argüello was able to make the best of technological and visual possibilities. He worked in pioneering businesses in the field such as Cinesite (Kodak), Synthetic Video and Pacific Data Images, producing images for the largest broadcasters at that time, such as ABC, NBC, HBO and TNT. Two iconic videos from the 1990s, both by Michael Jackson, are difficult to forget: in *Black and White*, precursor to *Morph* and other computational graphic techniques, a succession of faces morph from one into another, while in *Remember the Time*, an Egyptian fantasy, Michael himself turns into sand.

Argüello worked in cinema as a film stylist and creative director, and after collaborating with Disney and what later became Dreamworks, he made the jump to visual effects supervisor: projects such as *Sphere*, *Batman & Robin*, *The Mummy*, *The Devil's Advocate* and, of course, *Armageddon*, a science fiction super-production about an asteroid on the verge of crashing into the Earth, which made more than \$500 million USD worldwide.

But in 2001, Carlos Argüello decided to pack his bags and return to Guatemala. His reason? He wanted to launch Central America's first visual effects studio.

TEACHING BY DOING

Argüello believes that now is a good moment for Latin America to make the best of its natural creativity. "We are split between the old Latin America that produces cement, liquor and sugar, and the new one that instead of manufacturing, does *mindfacturing* work," he says. "We have many conflicts in the region, but this combination of art, which comes very naturally to our culture, and these new technologies could generate jobs in the long-term for many people, and prevent a brain drain."

With this idea in mind, Argüello founded Studio C, which eventually had 30 young artists on board from Antigua, Guatemala: one of their most important projects was a collaboration in the VFX for *The Chronicles of Narnia*, nominated for an Oscar for best visual effects.

In 2007, Fundación CA was established, an organization which has partnered with diverse governmental and private bodies to offer courses and training programs in Guatemala, Mexico, Colombia and Jamaica. Its focus is to "teach by doing," centering on the most pragmatic aspects of visual effects. Apart from the lack of academic programs in the region, Argüello claims that in this industry, a good reel often weighs more than a university degree; which is to say that candidates are expected to offer proof of experience, preferably in video format. "The traditional system in Latin America still revolves around the university degree and four-year courses; that works for some people, but most people have to enter the job market as soon as possible," he says. That is achieved, he explains, by learning through video tutorials and practicing at home, as well as by participating in internships in production studios that allow young people to get experience by exposing them to real projects and demands. "Having contact with real jobs is of primary importance in this industry."

In terms of his analysis, Argüello says he would not invest in traditional training, but find other ways of supporting those who are starting out in the profession; for instance, by building partnerships that allow private studios to invite more young people to take part in their projects. "Either that, or incentivize production centers where they can come together and have a better internet connection than in their homes, meet other people interested in similar projects and work in small groups from their towns in order to connect with the big cities." In a post-pandemic world, one of his plans is to reach new areas of Latin America and the Caribbean via streaming and self-learning.

TECHNOLOGY USED IN VIDEO GAMES IS CHANGING THE WAY HOLLYWOOD MAKES MOVIES

Until recently, no other option besides the ubiquitous green or blue background was imaginable when it came to creating impossible worlds, which rely heavily on post-production. Today, virtual production—a method that combines software with live recordings and computer graphics in real time—is gaining popularity. One of the leading 3D tools in this new field, called 3D Unreal Engine, is produced by Epic Games, the studio behind the globally successful game *Fortnite*. Created as a graphic motor for Epic Games, in 1998 it became a revolutionary virtual tool for cinematic productions.

Thanks to this technology, images can be projected and manipulated in real time on an LED wall so that the camera and actors can capture the image without the need for post-production or green screens. The tool, which is now in its fourth version and is open source for those who do not produce commercial video games, reducing both post-production costs and editing time; besides, in terms of efficiency, actors can perform their scenes in more realistic surroundings, right next to images of the most unreal creatures.

The use of Unreal Engine in the Disney+ original series *The Mandalorian*, winner of an Emmy for best visual effects, became famous, but it was not the first time that this tool was used in the *Star Wars* universe: in *Rogue One* (2016), Unreal Engine “made history” by working with CGI in real time.²⁴⁹ In *The Mandalorian*, the

series’ 3D sets created by the studio Industrial Light and Magic were edited in real time during the filming process.²⁵⁰

The technology used in video games is changing the way Hollywood makes movies, and it is likely that the challenges of producing film and television under pandemic restrictions will accelerate their use. Not only will this have an impact on post-production, but also on some of the industry roles which, according to experts, could potentially change. Aside from this, the possibility of projecting any landscape in the world onto a LED wall and filming it as though actors were physically there has already reduced the need for expensive trips and shoots.

The process is underway in Latin America. The National University of San Martín (Universidad Nacional de San Martín), in Argentina, publicly presented its academic partnership with Unreal Engine. The Center for the Technological Revolution in Creative Industries (Centro para la Revolución Tecnológica en Industrias Creativas), with its headquarters in Santiago de Chile, announced that it would install a virtual post-production laboratory to provide training in Unreal Engine to professionals from the creative industries. Other alternatives to Unreal Engine that compete in the virtual production market include Unity, Amazon Lumberyard, Cry Engine, 3ds Max Design, Blender, Maya, GameMaker and ARKit.

249 Harrison Miller, “Epic Games’ Unreal Engine takes movie production to the next level,” *Business North Carolina* (April 2, 2020), <https://businessnc.com/epic-games-unreal-engine-takes-movie-production-to-the-next-level/>

250 See Industrial Light & Magic, <https://www.ilm.com/halsrabbits/virtual-production-on-the-mandalorian/>

A PHILOSOPHER, FILMMAKER, CHEF, LEGAL ASSISTANT AND PR MANAGER: BEING A PRODUCER IN LATIN AMERICA IS MULTI-DISCIPLINARY BY NATURE

BECAUSE YOU WERE INTERESTED IN: :

education, skills, new skills, production, creative entrepreneurs

Production is a profession that is to some extent misunderstood by the public. If the director is the prose writer of the image and the photographer someone who creates paintings in movement, the producer tends to be seen as a mere facilitator, someone in charge of the financial and logistical aspect of the shoot, from convincing an investor, to renting the vehicles and filling out customs forms. “This inaccurate perception makes people think that the role of the producer is to get what everyone else needs, and they don’t appreciate their importance,” says Carlos Congote, head of Congo Films, in Colombia. “Before, everyone who studied film wanted to be directors and if not, assistant directors, and those who didn’t achieve this became producers,” says Mariane Hartard, executive producer of Fabula, in Chile.

Although training programs for producers already exist in Latin American schools, audiovisual production is not a profession that can be strictly defined. It is understood that a producer’s main responsibility is to make sure that a project meets its deadlines and stays within budget. But there are many kinds of production: executive, creative and associate, among others. During the conversations that gave rise to this book, we found producers who were trained as journalists, philosophers, chefs and PR managers. The spectrum of fields of knowledge and skills that can be useful to a producer is wide; in the words of those who dedicate themselves to the profession, there is barely a skill out there that would not be of use.



Production encompasses different fields of knowledge that are scarce among many creative entrepreneurs. As pointed out in the book *Launching an Orange Future*,²⁵¹ creative entrepreneurs in Latin America often suffer from a lack of legal and financial training. **“As a producer, I would like to have more of a legal background. I think it’s important for producers to understand the legal aspect from the moment you make your pitch until you deliver a project,”** says Laura Woldenberg, executive producer at Vice Mexico at the time of this conversation.²⁵² **“It’s very important to have the vocabulary, from the contracts to the repercussions of the story you are telling... This work is not just about making art and telling stories, and doing what you enjoy, there is also this whole other part you need to know about, the boring part,”** adds Woldenberg.

“Sometimes even I don’t know what my job is; but basically, it’s managing and driving projects forward in their various stages: I am responsible for ‘shepherding’ the projects, in a way,” Kyzza Terrazas tells us. A philosopher, film writer and director, he heads the creative production and development department at La Corriente del Golfo, the production company founded by Diego Luna and Gael García Bernal in 2018.²⁵³

Producers also have another kind of responsibility: to summon voices and ideas. Terrazas as well as Paula Amor, director of La Corriente del Golfo since it was founded, are convinced that it is necessary to make room for new, more diverse and plural voices, “What I think is missing is a verbed of talent, a kind of mentorship, in order to open the door to many people who are talented and haven’t had any opportunities because they don’t have the name, the connections or the same possibilities,” says Amor.

Based in Argentina, the Venezuelan producer Linda Díaz told us about her experience working in El Calefón, an independent audiovisual production company with offices in the city of Córdoba, Argentina. She founded the premium television department in which she produces projects since their inception. This work includes idea development and screenwriting. “I wanted to know what I could contribute to Calefón, and in 2016 I went to Cuba (to the International School of Film and Television [Escuela Internacional de Cine y Televisión] in San Antonio de los Baños) to study production and premium content... We are interested in propping up projects in the development stage and presenting them to a broader audience. As a small production company, what opens the door for us with the big players, is that every time we put a project on their desk it’s of high quality,” Linda says.

Alonso Ruvalcaba is a writer and Mexican chef who writes, reviews films and even founded Bretón, a well-known restaurant

in Mexico City. However, when Kyzza Terrazas, who knew him for his book *24 horas de comida en la Ciudad de México* (which could be translated as *24 Hours of Food in Mexico City*) asked him to join the production team for *Pan y Circo*, an Amazon Prime Video original, directed by Diego Luna, Ruvalcaba did not hesitate.

“Two years went by from the moment I got the call until the series aired and my role kept changing throughout the production,” says Alonso. His job was to create the pitch and brainstorm the series, and to do this he created his own team that would then integrate into the larger production team—and a parallel unit was established to manage the logistical side of things. “It’s a job in which a whole load of different efforts are taking place at the same time,” says Alonso, who also shared the complications of launching the series, which was scheduled for release in the early months of the 2020 pandemic; this led the production team to come up with a new episode, to be produced remotely via Zoom. “In any case, I know that producing telenovelas back in the day was ten times more difficult. We ended up being a team of around fifty people. A telenovela probably involves five hundred people, it wasn’t so complicated but it’s a firm structure, surrounded by a mobile framework,” he pointed out.

As the work of these interviewees demonstrates, creativity is a basic part of any producer’s work. “I never saw myself becoming a producer and yet I think I’m pretty good at it. Perhaps there could be more people going out on a limb and producing on a creative level and learning certain things along the way,” says Kyzza Terrazas. For Linda Díaz, the key is finding a way of professionalizing the job: “There is a lack of people with the creative tools to develop and write at the standard demanded by platforms nowadays. I am referring to the controversial figure of the showrunner, who can be very creative: someone who understands production and finance, and gets involved in the project at every phase of development. Training these professionals is strategic for our region,” she concludes.

“IT’S VERY IMPORTANT TO HAVE THE VOCABULARY, FROM THE CONTRACTS TO THE REPERCUSSIONS OF THE STORY YOU ARE TELLING... THIS WORK IS NOT JUST ABOUT MAKING ART AND TELLING STORIES, AND DOING WHAT YOU ENJOY, THERE IS ALSO THIS WHOLE OTHER PART YOU NEED TO KNOW ABOUT, THE BORING PART,” ADDS WOLDENBERG.

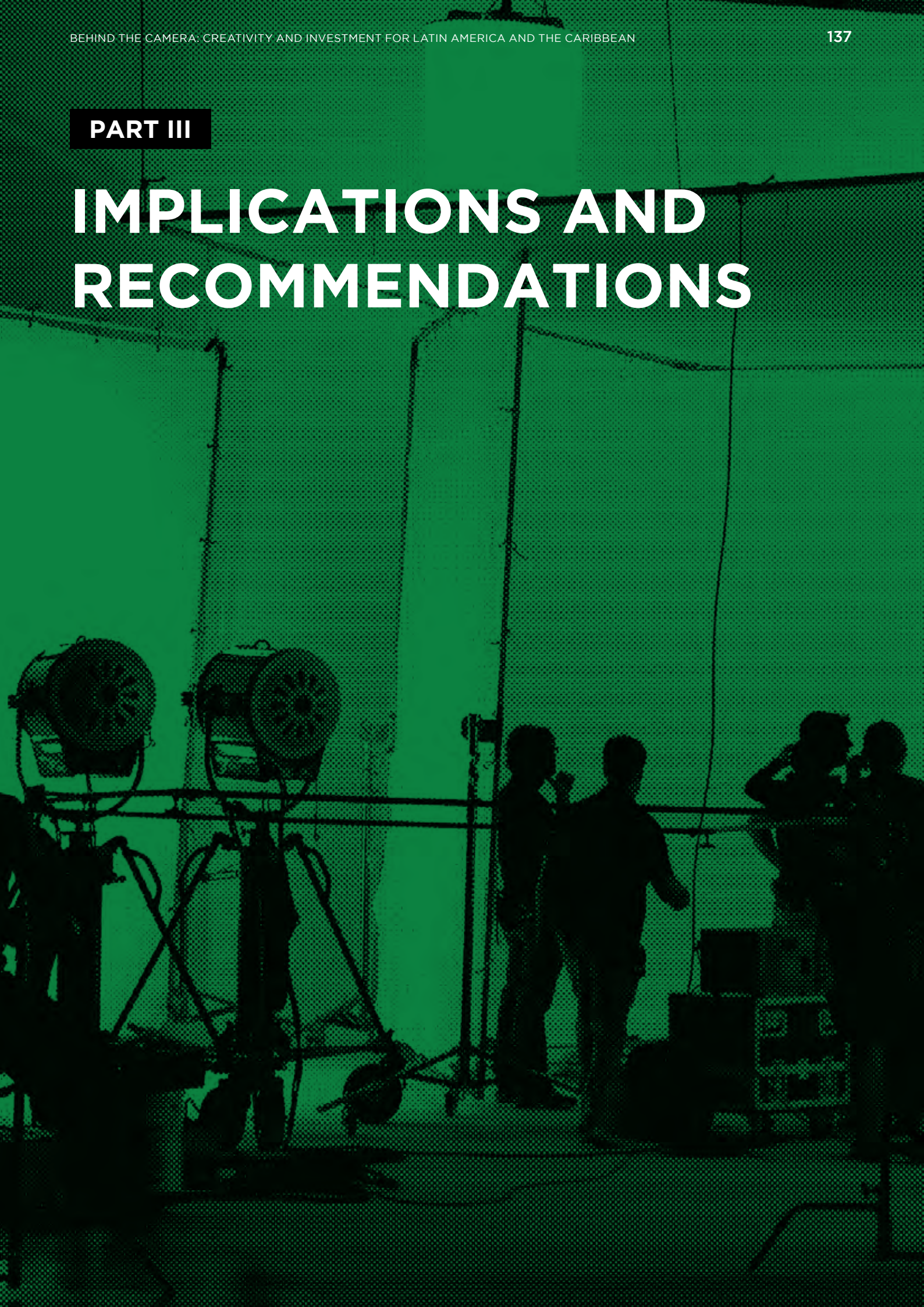
251 Leticia Gasca and Alejandra Luzardo, *Emprender un futuro naranja. Quince preguntas para entender mejor a los emprendedores creativos en América Latina y el Caribe* [Launching an Orange Future: Fifteen Questions for Getting to Know the Creative Entrepreneurs of Latin America and the Caribbean] (Inter-American Development Bank, 2018), 78.

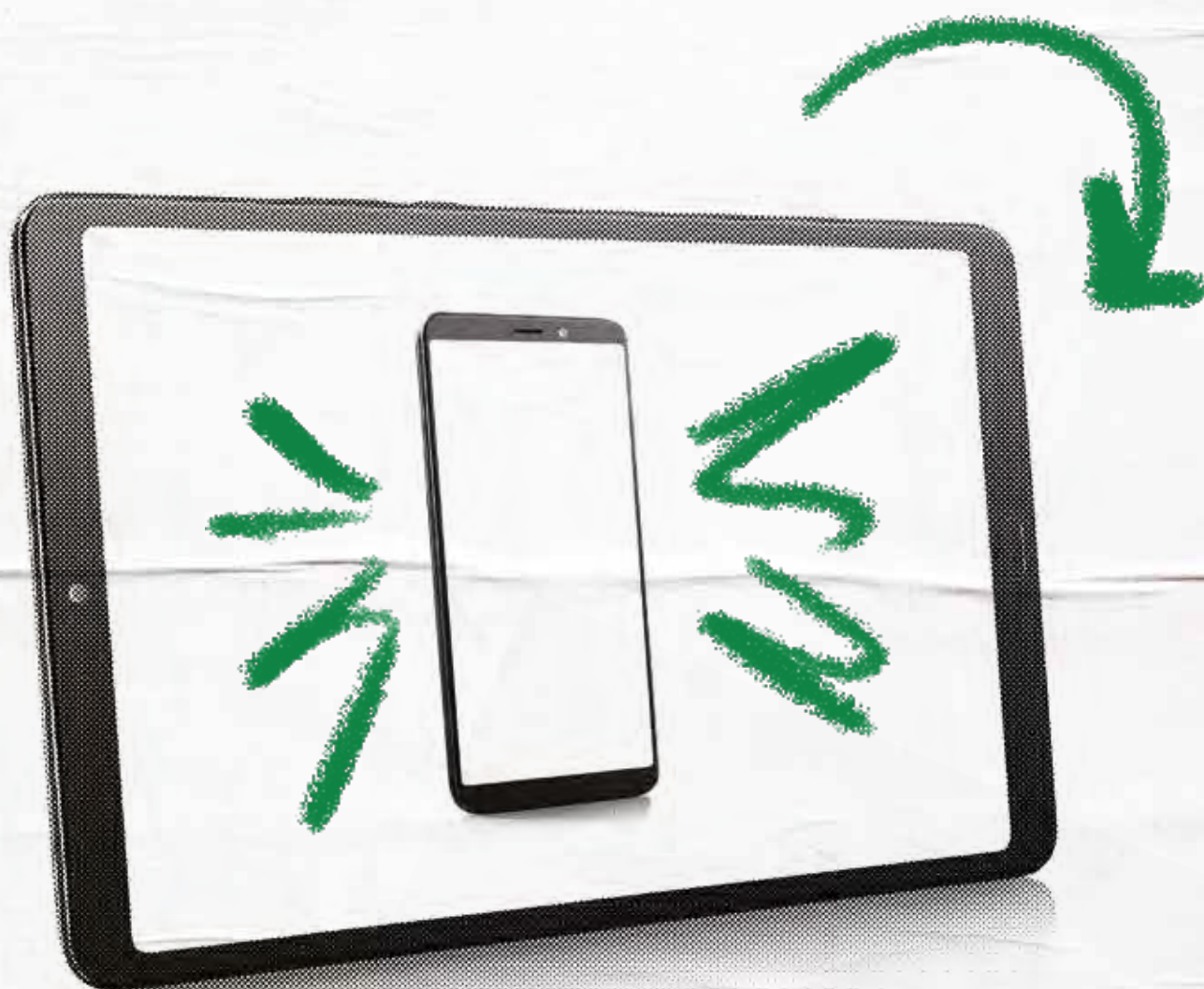
252 Laura Woldenberg, personal communication (October 16, 2020).

253 Kyzza Terrazas, personal communication (December 8, 2020).

PART III

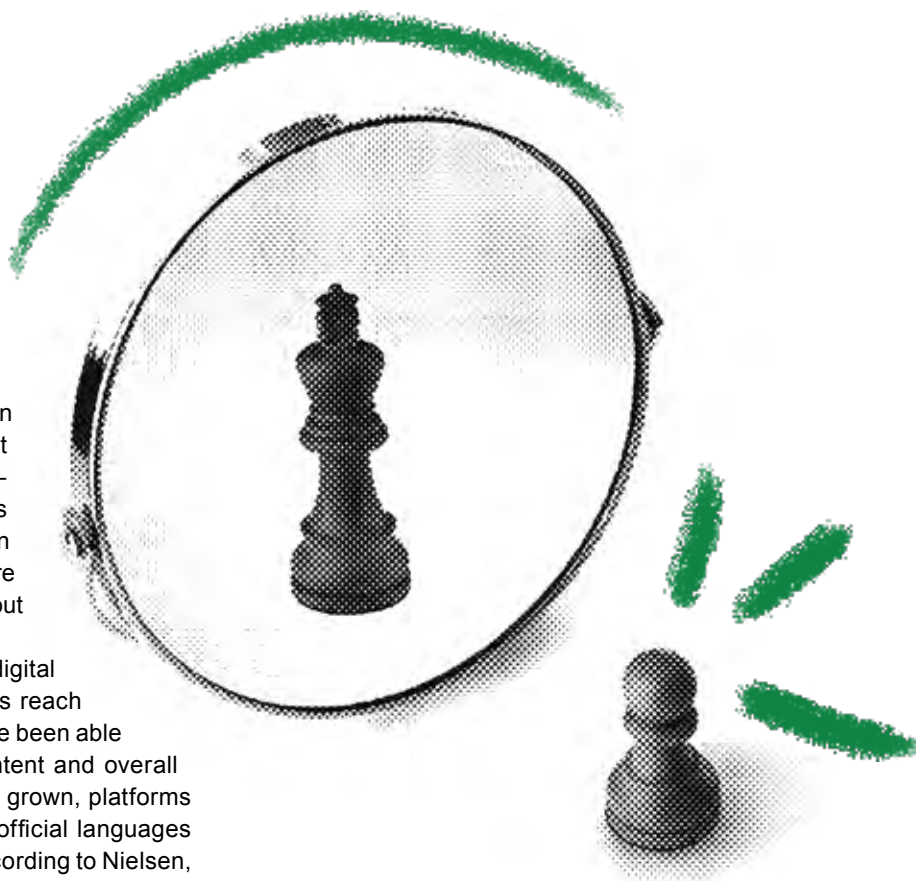
IMPLICATIONS AND RECOMMENDATIONS





CHAPTER 5

THE SCREEN AS A MIRROR



Ideally, a society sees itself reflected in its films and series. In recent years, great advances have been made in terms of representation in the audiovisual sector. Thanks to artists and activists who have spoken out, ideas about diversity and inclusion are inescapable in any current discussion about the direction the industry is taking.

Thanks to the creative freedom of digital channels and the fact that their products reach niche audiences, streaming services have been able to aim for diversity in their themes, content and overall creative strategies. As local content has grown, platforms have increased their productions in co-official languages in countries such as India and Spain. According to Nielsen, on-demand content in the United States is more diverse than cable TV.²⁵⁴ The same thing occurs when streaming is compared to cinema—a recent study by Netflix and the University of Southern California highlights that 48.4% of Netflix original films released in 2019 included women in the leading cast, compared to 41% of the highest grossing films in the United States that same year.²⁵⁵

Latin America and the Caribbean have suffered from historical ills such as racism, violence against women and social inequality. In Mexico, the actor Tenoch Huerta has spoken out against racism in films and television, triggering an important discussion in a country where dark-skinned people, the Black community and indigenous people have hardly appeared on screen—or worse still, have been stereotyped. In terms of representation, for decades the casts of the most popular productions—telenovelas, for example—were made up of white, cisgender, able-bodied actors. This has begun to change in some countries. The premiere of *Mister Brau* (Globo, 2015), which some specialists consider to be the first Brazilian series with a middle-class Black couple as the central characters,²⁵⁶ was a milestone. From then on, more television and streaming content have included Black actors among their protagonists, and Netflix even released *Super Drags*, an animated series with LGBT+ characters. According to Claudia Augustinis, director of Production Management at Netflix, “Diversity is something we have to insist upon constantly in every conversation we have with producers. In Brazil, 56% of the population is Black. And if we don’t see that represented on the screen, we are not representing Brazil.”²⁵⁷

However, it is not enough to have diverse faces represented on screen. It is also important that historically marginalized groups have their place in the audiovisual industry, especially in the decision-making spaces. Opening up opportunities to women in professions dominated by men, like direction or production roles, is also an urgent step.

Achieving this is far from simple. The Latin American audiovisual industry is still a closed world in which historical power structures like machismo and racism, as well as personal connections, often determine who receives opportunities and who does not. Many of the creators with whom we spoke for this book admitted that personal connections played an important role in their finding space within the industry. If we want diverse emerging talent, we have to open up spaces where we listen to new voices and give them an opportunity to contribute.

254 Nielsen, “Being Seen on Screen: Diverse Representation and Inclusion on TV” (December 2, 2020). <https://www.nielsen.com/us/en/insights/report/2020/beingseen-on-screen-diverse-representation-and-inclusion-on-tv/>

255 Stacy Smith et al., “Inclusion in Netflix Original U.S. Scripted Series & Films,” *USC Annenberg Inclusion Initiative* (February 2021). <http://assets.uscannenberg.org/docs/aii-inclusion-netflix-study.pdf>

256 Eli Carter, “Representing Blackness in Brazil’s Changing Television Landscape: The Cases of *Mister Brau* and *O Grande Gonzales*,” *Latin American Research Review*, 53 (2018), 344–357. <https://larriasa.org/articles/10.25222/larr.330/>

257 Claudia Augustinis, personal communication (February 21, 2021).

AMPLIFYING VOICES: A CONVERSATION WITH WOMEN IN THE LATIN AMERICAN AUDIOVISUAL WORLD

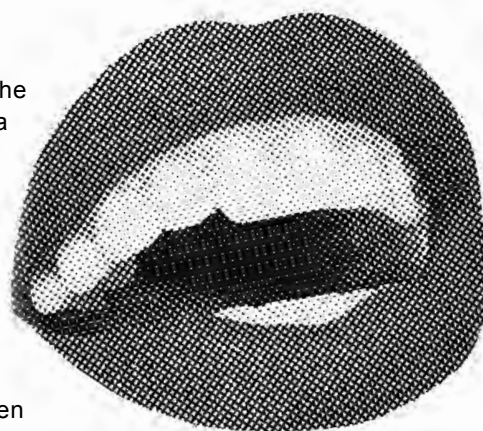
BECAUSE YOU WERE INTERESTED IN:

representation, gender, women filmmakers, best practices

Women have taken the floor in the audiovisual industry. As if through a megaphone, their voices have been amplified thanks to the incorporation of more women workers in key positions, publicly denouncing experiences of gender violence or encouraging the creation of content with a gender perspective and more diverse characters.

However, progress has been slow. Just recently, our region's film commissions and associations have generated statistics that reveal the gender gap in the audiovisual sector. No woman director was behind any of the most popular Mexican feature films of the past twenty years²⁵⁸ and only 20% of the feature films produced in 2019 in Mexico were directed by women.²⁵⁹ In Argentina, less than 35% of the jobs within the industry are filled by women.²⁶⁰ In Brazil, the Commission on Gender, Race and Diversity pertaining to the National Film Agency (ANCINE) stated that three quarters of the films released in 2016 were directed by white men.²⁶¹

Nina Wara, a Bolivian filmmaker settled in Mexico, believes that the main challenge is to ensure that women's work and ideas are treated with the same importance as that of their male counterparts. During the shooting of her directorial debut *El murmullo del viento* (2018), in the province of Potosí, Bolivia, Wara describes the tensions



involved in taking on the role of director in an ecosystem dominated by men. "They wanted to tell me how to direct, what to do, and even how to connect with people from the region," she says. Wara's experience is glaringly similar to what the Colombian Natalia Santa went through when she directed *La defensa del dragón* (2017). She comments: "I felt moments of strong aggression from part of the technical team who expected me to take on a masculine role in the shoot, something I would never do because I am not interested in creating those kinds of power relationships or initiating those kinds of dialogues with the people I work with." They both agree that the rigid hierarchy of job positions, with the figure of the director at the top of the pyramid, is an old-fashioned way of structuring the enriching collaboration that an audiovisual production entails.

258 Anuario Estadístico de Cine Mexicano 2015. IMCINE (Instituto Mexicano de Cinematografía), Secretaría de Cultura. <http://anuariocinemx.imcine.gob.mx/Assets/anuarios/2015.pdf>

259 Anuario Estadístico de Cine Mexicano 2019. IMCINE (Instituto Mexicano de Cinematografía), Secretaría de Cultura. <http://www.imcine.gob.mx/cine-mexicano/anuario-estadistico/>

260 Observatorio de la Industria Audiovisual de Argentina e INCAA. "Informe igualdad de género en la industria audiovisual argentina. Observatorio de la Industria Audiovisual de Argentina e INCAA" (2019). http://www.incaa.gov.ar/wp-content/uploads/2019/12/incaa_oava_igualdad_de_genero_2019.pdf

261 Luana Rufino. *Diversidade de gênero e raça no audiovisual*. ANCINE. https://www.gov.br/ancine/pt-br/centrais-de-conteudo/publicacoes/apresentacoes/MARCachoeira_LUANARUFINO.pdf



AN EXPLOSION

In 2017, the #MeToo movement emerged like a rising tide among Hollywood female workers and actresses who publicly denounced experiences of abuse and gender violence they had suffered at the hands of powerful men within the audiovisual industry.

If something set this movement apart, it was the opportunity to amplify female voices thanks to the tools of the trade: the megaphone, the screen, the discussion that went viral on social media and spread across the world.

"When the explosion of #MeToo hit Mexico, I felt enormously overwhelmed. I was concerned that we did not have the information nor the clarity to deal with a process like this when faced with a case of harassment and violence, in a world where you can't bury your head in the sand," says Paula Amor, director at La Corriente del Golfo, in Mexico.

Amor, who forms a part of the #YaEsHora collective with other film and television industry workers, understood the urgency of establishing clear guidelines in terms of prevention of and attention to gender violence in the audiovisual sector, and particularly inside the company she directs. She confides that after a long search she found an ally in Andrea Foncerrada, president of The Boston Center, an organization that as well as operating as a research center, designs and implements protocols to prevent and deal with different kinds of violence in professional and educational settings.

The attorney Alejandra Vázquez, director of protocol at The Boston Center, was in charge of designing a flexible tool that could adjust to the needs and dynamics of the eight first Mexican production companies that, after engaging in a dialogue, decided to implement a protocol for workplace harassment: La Corriente del Golfo, Pimienta Films, Bengala, Panorama Global, Piano Filmadora, No Ficción and Cinépolis Producción. The protocol addresses sexual and gender violence, as well as discrimination of any kind and other micro-aggressions. For a few months, Vázquez held interviews and meetings with production companies

in order to understand how each one operated: once she understood the workflows, it became easier to understand the potential power dynamics and establish both external and internal evaluation committees. Vázquez also faced the challenge of designing guidelines regarding how to treat minors, and in a more general sense understand the difference between permanent and temporary workers, which necessarily implies different settlement mechanisms. The document aims to be clear for those who, by contract, must adhere to it, and one of its essential parts defines forms of violence: for example, within a work environment, accosting happens among equals and harassment occurs when one party holds power over the other.²⁶²

According to Alejandra Vázquez, the result is "a living document that doesn't just impose sanctions, but seeks to protect everyone." Considering that its basis is subject to continuous revision, and can be adapted according to the ethical code of each production company that decides to adopt it, its scope and sphere of implementation are clear, and can be adjusted to the legal framework of each country or region.

"This is an historic grievance that we are listening to, since we believe in a culture of speaking out and denouncing. This is not a matter of having the document and putting it away in a drawer: many companies have complaint mechanisms, but they do not have preventive measures, they do not carry out training and they do not have reparation measures. Neither do they grant the right of reply, which is equally important," comments Andrea Foncerrada.

"We were the first to have protocol in operation and now we have a sustainability manual in order to be friendlier within our productions and change the rules with very simple measures," says Paula Amor.

For the series that La Corriente del Golfo released on Netflix in 2021, *Todo va a estar bien*, the writers' room took part in a dissident masculinities workshop, just like one of the characters.

"Only recently, in the past two or three years, have we begun to see storylines with a gender perspective, where women have agency and autonomy, and are not subordinate to men nor do their stories revolve around them," says Nina Wara, who supports the growing audiovisual worker associations which constitute spaces that are not only less competitive, but also sources of empathy and care. "The weight of machismo and the patriarchy is much

ME TOO

262 Andrea Foncerrada and Alejandra Vázquez, personal communication (January 11, 2021).

heavier than we can understand, and this is a process of decolonization and letting go of old beliefs," she concludes.

Laura Woldenberg, executive producer at Vice México at the time of this interview, released *Las tres muertes de Marisela Escobedo* on Netflix in 2020, a documentary about the Mexican activist Marisela Escobedo. During its first week, it remained in the top three most-viewed shows on the platform, demonstrating the interest and urgency of discussing these subjects through documentary film. "It's being launched at a very relevant time, while this conversation about gender violence and feminism is taking place," says Laura.

A few years ago, the documentary *Miss Representation* (2011) tackled several subjects, among them the underrepresentation of women in audiovisual stories: at that time, only 16% of the leading roles in films and series were played by women. Although a study by Women & Hollywood claimed that this percentage had risen to 40% by 2019, it remains a fact that behind the camera, the proportion of women in key roles is still very low (34%).²⁶³ Interestingly, women make up a large proportion of audiences: in January 2020, a poll conducted in the United States showed that women are more likely than men to watch television every day.²⁶⁴ It is important to see oneself reflected in the stories presented on screen. This forces us to ask ourselves various questions about the narratives at the center of our societies: who decides what stories get told? What can we do to fill this gap created not only by underrepresentation, but also by symbolic annihilation?

It is hardly necessary to add that women workers and caregivers have been affected most by the COVID-19 pandemic. Besides, women have also spent decades dealing with an epidemic of patriarchal violence. In 2021, the Inter-American Development Bank identified this particular situation among workers in the region, and that same year directed 40% of its support for the pandemic crisis towards women and girls, emphasizing women who own small businesses.²⁶⁵ The audiovisual sector has a responsibility to do things better, and also an enormous potential to create change.

On March 8, 2021, International Women's Day, Netflix announced a fund dedicated to incentivizing creative equity in the global entertainment industry, with \$20 million USD annually predicted for the next five years and a special emphasis on talent originating in Africa.²⁶⁶ These kinds of initiatives will undoubtedly become common currency among streaming companies, which will have to do more than just tell stories from different points of view to capture their audiences: it is necessary to change the structure and enable the decision-making process to be more diverse and inclusive. At this point, the process is irreversible.

263 Women & Hollywood, "Statistics", *Center for the Study of Women in Television and Film* (2019). <https://womenandhollywood.com/resources/statistics/2019-statistics/>

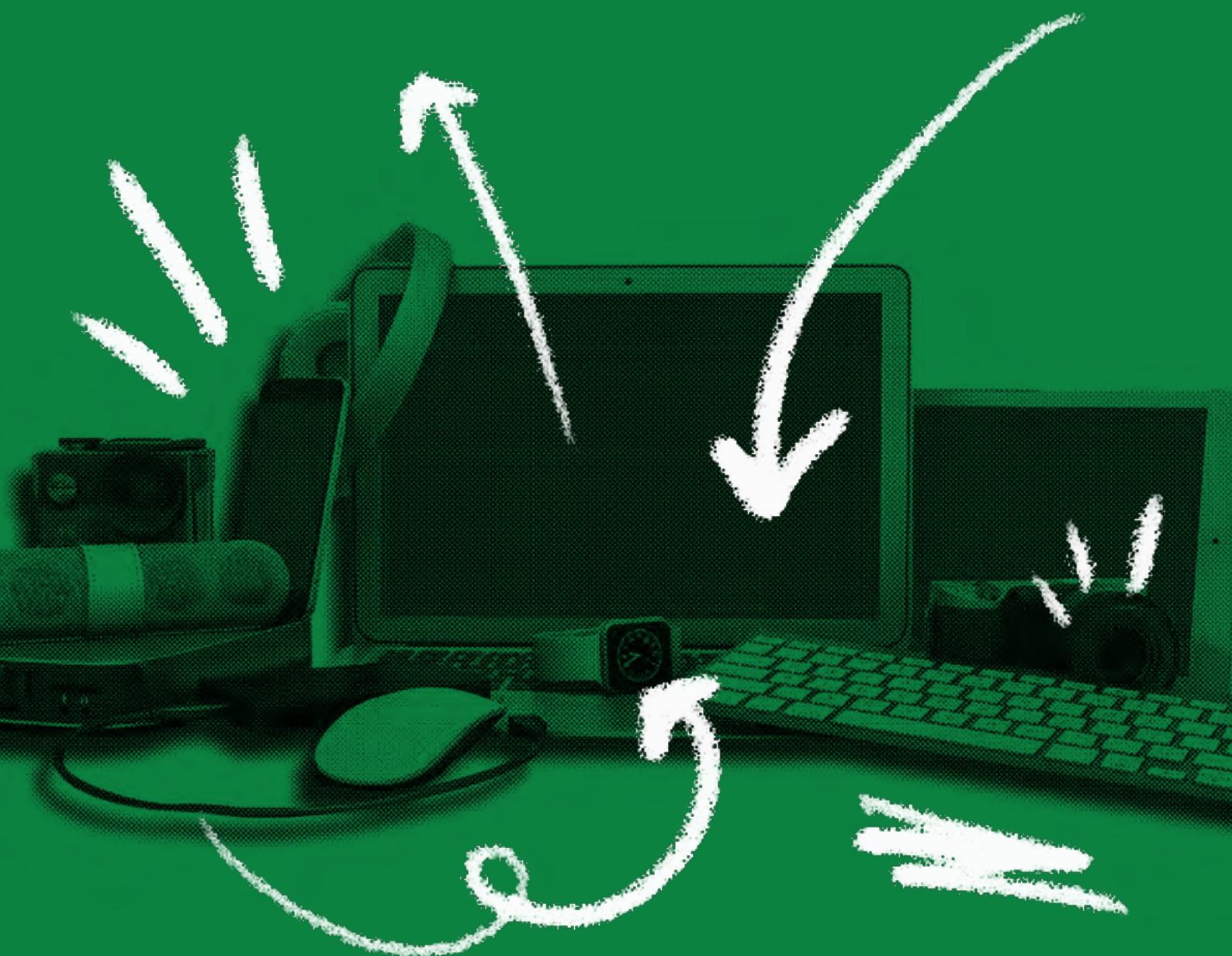
264 Statista, "Frequency of watching or streaming TV shows among adults in the United States as of January 2020, by gender" (February, 2020). <https://www.statista.com/statistics/936166/tv-shows-watching-streaming-frequency-by-gender-us/#:~:text=A%20survey%20conducted%20among%20U.S>

265 Mauricio Claver-Carone, "IDB's Commitment to Women Empowerment," *IADB.ORG* (March 11, 2021). <https://blogs.iadb.org/igualdad/en/idb-commitment-women-empowerment/>

266 Emelike Obinna, "Netflix to uplift women in entertainment with \$5m from Creative Equity Fund", March 18, 2021. <https://businessday.ng/arts-and-life/article/netflix-to-uplift-women-in-entertainment-with-5m-from-creative-equity-fund/>



BEST PRACTICES AND SPACES FOR EDUCATION: **DIVERSITY, INCLUSION AND TRAINING**



SENA FILMS (COLÔMBIA)

The strategy followed by SENA Films (Cine al SENA), in its fifth year, is a partnership between the National Learning Service (Servicio Nacional de Aprendizaje / SENA), the institution in charge of public education in Colombia, and producers, festivals and markets. Ultimately, the strategy seeks to strengthen the audiovisual industry and offer more job opportunities to apprentices trained in their technical and technological courses.

According to Elkin Manco,²⁶⁷ national head of Cine al SENA, the program offers a wide range of educational options related to audiovisual content, with training programs in film, television, multimedia production, animation and new formats such as virtual reality. So far, agreements have been signed with the Cartagena International Film Festival, Bogoshorts Film Festival, Bogotá Audiovisual Market, Indiebo, Festival Mambe, Bolivia Lab, Premios Macondo and with the technical film school Congo Films,²⁶⁸ the technical infrastructure of which allows for real work experience within productions for students. Until 2019, more than two thousand students from various regions of the country have benefited from these programs, including the mobile classrooms in rural sectors. In 2018, the short *Chocatos*, by four apprentices at the Centro Agroturístico Sena San Gil, in Santander, won in the category of best short film at the International Film and TV Festival in Benevento, Italy.²⁶⁹

In this training process with Congo Films and in the context of the pandemic, virtualization has democratized content even more, says Elkin Manco, giving more than 1,500 young Colombians the opportunity to attend virtual workshops.



BOOST THE BASE (BRAZIL)

Boost the Base is a program that functions like a partnership between Netflix Brazil, audiovisual institutions that simultaneously operate as non-profit organizations, and a few production companies. The program's objective is to hire young people from peripheral zones or socially vulnerable contexts, belonging in their majority to Black and LGBTQI+ communities, for basic jobs within the production of projects developed for Netflix. It works, according to Claudia Augustinis from Netflix Brazil's production team, "like a pyramid,"²⁷⁰ which seeks to include more individuals at the bottom in order to strengthen and elevate the abilities of the crew, allowing for more people to eventually gain key jobs. This is a way of reducing the gap in opportunities and helping underrepresented people to experience paid work in a large production.

The initiative was implemented, for example, in the popular science fiction series *3%*. In 2018, Tiago Mello, executive producer of the series and director at the production company Boutique Films, approached the Instituto Criar to make a first selection which turned into a dilemma: in the spirit of inclusion, he ended up "giving everyone a job."²⁷¹ During seasons three and four of *3%*, almost 30 young graduates from the Instituto Criar were given their first work opportunity in areas including art, production, make-up and costume design. A special case is that of Jacqueline Viana, a young Afro-Brazilian who was homeless as a teenager, and whose skills working with styling Black hair allowed her to connect with Black actresses from the series. Not only was she hired for the following season, but her contribution to the look of the series is palpable. For Augustinis, when they approach a production company to propose these recruitments, the most important thing is to make sure they know this is not a social service, or charity. The results in the content will always be better when there are diverse voices behind the cameras, she says.

INSTITUTO CRIAR (BRAZIL)

The Instituto Criar de TV, Cinema e Novas Mídias, or Instituto Criar, located in São Paulo, has trained more than two thousand students since it was founded in 2004 thanks to government and private contributions. Its highly technical training program with short courses is designed specifically for young people in socially and economically vulnerable situations. The teaching is comprehensive in terms of the audiovisual production, taking students through all the departments, with specializations in art direction, photography, production, post-production and audio. Students carry out all activities (even having breakfast and lunch) in the school which is three thousand square meters in size, and contains sixteen workshops and two studios, as well as spaces for woodworking, styling and make-up, a digital laboratory, central lighting and camera equipment, to mention a few of the facilities.²⁷² Thanks to a collaboration with the municipality of São Paulo, students between 17 and 20 years of age receive a grant during the year of their studies at the Institute.²⁷³

267 Semana, "Sena Cine, la apuesta por la industria audiovisual" (November 17, 2020). <https://www.semana.com/hablan-las-marcas/articulo/sena-cine-la-apuesta-por-la-industria-audiovisual/202047/>

268 Paola Pinzón, "Cine al Sena, apoyo al talento audiovisual de los aprendices," *Revista Digital Sena* (September 17, 2020). <https://revistadigital.sena.edu.co/2020/09/17/cine-al-sena/>

269 Víctor Ardila, "Sena obtuvo premio al mejor cortometraje internacional," *Vanguardia* (July 14, 2018). <https://www.vanguardia.com/santander/guanenta/sena-obtuvo-premio-al-mejor-cortometraje-internacional-GEVL438835>

270 Claudia Augustinis, personal communication (February 21, 2021).

271 About Netflix, "'3%' leaves a lasting legacy of inclusion behind the scenes" (September 15, 2020). <https://about.netflix.com/en/news/3-percent-inclusion-behind-the-scenes>

272 See institutocriar.org

273 Secretaria Especial de Comunicação, "Prefeitura renova parceria com Instituto Criar de TV, Cinema e Novas Mídias" (June 7, 2019). <http://www.capital.sp.gov.br/noticia/prefeitura-renova-parceria-com-instituto-criar-de-tv-cinema-e-novas-midias>

FONDO MIRADAS (MEXICO)

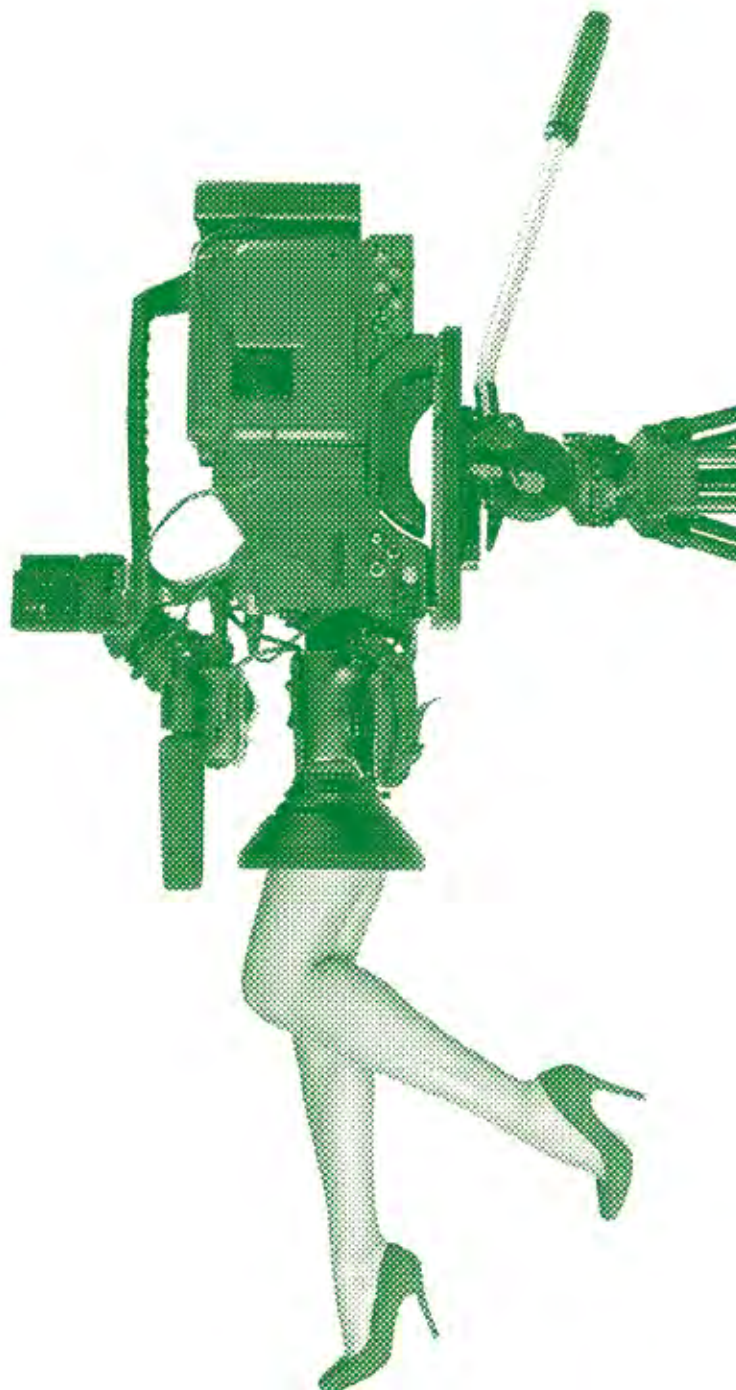
Ambulante, founded in 2005 by Gael García Bernal, Diego Luna and Elena Fortes, has made a name for itself as an itinerant documentary festival and non-profit organization. In partnership with Netflix, it will allocate 15 million Mexican pesos²⁷⁴ to promote audiovisual creators from thirty indigenous and Afro-descendant communities, as well as to support more than eighty production companies affected by COVID-19, benefiting more than five hundred people. The projects were selected by a committee of eleven key experts and actors from the film community in Mexico and Central America. Among the stated eligibility criteria was a demonstration of commitment “to processes of community empowerment.” The fund, announced Ambulante, supports emerging and mid-career filmmakers, as well as those with a history of working in genres such as documentary, fiction, animation or experimental film, with projects in the shooting or post-production phase.

CIMA IMPULSA (SPAIN)

In Spain, Netflix teamed up with the Association of Women in Film and Audiovisual Media (Asociación de Mujeres Cineastas y de Medios Audiovisuales - CIMA) and the Institute of Cinematography of the Visual Arts – ICAA (Instituto de la Cinematografía de las Artes Visuales) pertaining to the Ministry of Culture and Sports to launch CIMA Impulsa, a consultancy and training program.²⁷⁵ This initiative was created to accompany the development of projects by filmmakers, screenwriters and film and television producers, who would later get the opportunity to present these projects at audiovisual markets and forums. In its second year, in 2021,²⁷⁶ it increased the number of projects to be selected to twenty, including animation, and the call for applications was extended to Latin America. Support is awarded to six fiction feature films, four documentary feature films, five fiction series, two documentary series, two animated feature films and one animated series.

POTRERO DIGITAL (ARGENTINA)

Potrero Digital, a learning space devoted to digital professions, was established in the La Juanita co-operative in the municipality of La Matanza, on the outskirts of Buenos Aires. The students—young men and women from vulnerable social backgrounds—can specialize in animation, video games, social media, applications and digital marketing.²⁷⁷ The initiative emerged when, after directing his first animated film, *Metegol* (2013), the director Juan José Campanella realized that most animators were foreigners; besides, the level of specialization that these professions required opened up an alternative way of offering more job opportunities to young people.²⁷⁸ The school opened in 2018 with support from Mundo Loco, Campanella's production company, and Argentina's National Art Fund (Fondo Nacional de las Artes de Argentina). Apart from its courses, it offers internships and other forms of job placement.



274 Imcine.gob, *Fondo Miradas de Ambulante y Netflix*, (n.d). <http://www.imcine.gob.mx/fondo-miradas-de-ambulante-y-netflix/>

275 Pau Venteo, “CIMA, ICAA y Netflix impulsan la carrera de las mujeres en el audiovisual con un programa de asesoramiento y formación,” *Europa Press* (May 20, 2020). <https://www.europapress.es/cultura/cine-00128/noticia-cima-icaa-netflix-impulsan-carrera-mujeres-audiovisual-programa-asesoramiento-formacion-20200520132947.html>

276 Crónica, “Netflix + CIMA Impulsa apoyarán 20 proyectos audiovisuales creados por mujeres” (April 13, 2021). https://www.cronica.com.mx/notas/netflix_cima_impulsa_apoyaran_20_proyectos_audiovisuales_creados_por_mujeres-1183336-2021

277 Ministerio de Cultura Argentina, “Inauguró el Potrero Digital, una escuela de oficios digitales destinada a jóvenes en situación de vulnerabilidad” (September 28, 2018). https://www.cultura.gob.ar/inauguro-el-potrero-digital-una-escuela-de-oficios-digitales-destinada-a-jovenes-en-situacion-de-vulnerabilidad_6567/

278 Julián Zocchi, “Potrero digital: el sueño de Juan José Campanella que hace escuela,” *Clarín* (November 6, 2020). https://www.clarin.com/viva/potrero-digital-sueno-juan-jose-campanella-hace-escuela_0_Lf4p0VfXe.html



AFRO-DESCENDANT BRAZIL: UNTOLD STORIES

CoLABoratorio Criativo is a practical training program that seeks to empower emerging Afro-Brazilian screenwriters and filmmakers and equip them with the tools to develop a series that they can present to Netflix Brazil (or eventually, to any streaming company). To achieve this, they have Afro-descendant instructors who are recognized within Brazil's entertainment industry as well as in the United States, some of them with experience in series and films that have achieved success in Hollywood.

According to statistics from the Brazilian Institute of Geography and Statistics (Instituto Brasileiro de Geografia e Estatística - IBGE),²⁷⁹ more than 115 million Brazilian inhabitants identify as Black or *pardo* (Brown), representing more than half of Brazil's population. There is an opportunity as well as an urgent need to create narratives that connect with this community's history and aspirations.

In 2020, its first year, participants were selected by creating a map of the most promising Black screenwriters and filmmakers, curated with the help of associations and professionals, as well as a round of interviews. The selected individuals, from diverse backgrounds and career paths, took part in a five-month program, which included theoretical and practical classes via Zoom for six hours a day for five weeks. The instructors, who came from distinct disciplines, taught modules on character development, episode structure, practical aspects of the operation of a writers' room or creating the perfect pitch, for example. This initiative was a collaboration between WIP, an entertainment intellectual property accelerator based in São Paulo, and AFAR Ventures, a media consultancy that specializes in diversity with offices in New York and Salvador de Bahia, and was supported financially by Netflix. Its implementation, although intensive, was highly rated²⁸⁰ by participants, because it allowed them to learn about matters of structure from expert writers and filmmakers, how pitching processes work and what people are looking for, and how a streaming company's writers' rooms operates.

²⁷⁹ Instituto Brasileiro de Geografia e Estatística (IBGE), Pesquisa Nacional por Amostra de Domicílios Contínua trimestral (2021). <https://sidra.ibge.gov.br/tabela/6403>

²⁸⁰ AFAR Ventures, CoLABoratório Criativo, *Empowering Afro-Brazilian Storytellers. Final Report* (October 2020).

LESSONS LEARNED AND PATHS TO EXPLORE

This publication can be a reference guide for those responsible for decision-making in Latin America and the Caribbean, since it provides an account of the state of the audiovisual industry and its potential as a driver of development. We believe that this is the first step towards visualizing the sector's challenges and opportunities, identifying the required skills within the market and adhering to policies that support the training of human capital. The voices gathered here contribute ideas that invigorate the industry's regulatory debates and are capable of inspiring public policies that favor Latin America's audiovisual industry. Here are some of the lessons learned:

WILLINGNESS TO PROMOTE PUBLIC POLICIES IN LINE WITH OUR REALITY

The recent boom in video streaming services has consolidated Latin America and the Caribbean as a market that seeks to consume high-quality local content, which has impacted production methods, circulation and consumption. Adaptation and the reinvention of public policy are necessary for a 4.0 industry. Governments have the opportunity to take advantage of the sustained growth of one of the most dynamic industries in the world if they prioritize programs that promote the training of human capital and skill development. Attracting investment from the private sector is essential to build an industry that requires better trained technical professionals with increasingly sophisticated knowledge in line with higher industry standards and growing demand. As well as attracting investment, regional public policies should encourage the production and the circulation of locally-produced content and adopt a focus that strengthens the entire value chain of the audiovisual sector.



NEW SKILLS ARE OF KEY IMPORTANCE TO THE ENTERTAINMENT INDUSTRY

The digital era has transformed the audiovisual sector and demands a new set of skills to navigate the present and prepare for the future. The growing automation of work will transform the labor market, demanding a series of 21st-century skills or abilities, which include digital skills, but also skills based on creativity, metacognition (or the ability to learn how to learn), resilience, soft skills and the capacity to adapt. Faced with the highly likely process of the automation of a substantial number of jobs in Latin America, it is crucial to opt for developing sectors in which new skills and creativity reign. It would be a strategic move to invest in non-perishable skills, i.e., those skills that can be transferred from one job to another.

The audiovisual and entertainment sector is an important source of jobs for young people, a fact which in turn demands that schools and educational spaces (for example, higher education and technical education centers) be updated in order to train the new generations in a manner that is both swift and increasingly in line with the industry's demands. The fourth industrial revolution is already opening up new spaces for economic participation; making the best of this will be essential in order to modernize economic dynamics.

ACTIVE LISTENING AND ONGOING EXCHANGE

Incentivizing cross-national conversations between audiovisual stakeholders will be key in helping the industry face its most pressing challenges. The interviewees consulted for this publication agreed that the industry is evolving at a rapid pace; they have also underscored the importance of encouraging a greater exchange of best practices on a regional level that contribute towards more realistic future regulatory developments.

COLLABORATION BETWEEN COUNTRIES AND CITIES WITH ESTABLISHED INDUSTRIES AND NEW EMERGING CENTERS

The report highlighted audiovisual ecosystems and countries grouped according to their level of maturity. Driving co-operation between more established audiovisual hubs with others that are only beginning could incentivize the development of the industry in the region. Exploring the idea of creating a Latin American audiovisual space to incentivize professional exchange and training would help to consolidate new production hubs and inspire innovation in those that are well established. To achieve this, it is essential to ensure that education and training respond the real needs of the industry and to those jobs that are in high-demand, since the audiovisual sector is already faced with talent bottlenecks.

INVESTMENT IN THE DEVELOPMENT OF TALENT AND TECHNOLOGY

The lack of adequate training courses offered by educational institutions is the major challenge faced by the audiovisual production workforce in Latin America and the Caribbean. It is necessary to continue studying and understanding the audiovisual sector to identify the gaps in training, which can vary between countries. Carrying out more research and studies could be a first very valuable step in understanding the sector's deficiencies within countries, regions or even cities. Technology plays a very special role in the creation of audiovisual content, both in the production and post-production phases, as well as in distribution and exhibition, creating advantages in the recording and treatment of images, and opening up new horizons for the distribution of audiovisual content through new devices and services.

DIVERSITY IS OF KEY IMPORTANCE TO DEVELOPING TALENT

Diversity of talent will be crucial in making sure that Latin America and the Caribbean consolidate as an audiovisual powerhouse. It is necessary to include historically excluded groups in creative spaces to create new narratives and break with old stereotypes. Women, indigenous groups, the Afro-descendant community, disabled people and people from socially vulnerable contexts constitute invaluable human capital, necessary for changing course and telling stories that matter, stories with the potential to make an impact on a global level.



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