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**The impact of digital technologies on the diversity
of cultural expressions
in Spain and Hispanic America**

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Executive Summary

In the past two decades, digital technologies have transformed the cultural scene profoundly. New forms of creation, production, distribution, access and participation have revolutionized entire industries, such as book publishing, music and film. Changes have brought both opportunities and challenges to the creative chain, in a process that has affected both the Global North and South.

Within UNESCO, close attention is being paid to this issue under the framework of the 2005 Convention on the Protection and Promotion of the Diversity of Cultural Expressions. In addition to the various investigations that have been carried out to date, the Parties to the 2005 Convention are gradually including digital issues in their quadrennial periodic reports, as they move forward in drafting operational guidelines exclusively focused on this topic.

In this paper, we examine the impact of digital technologies on the diversity of the cultural expressions in Spain and Hispanic America, paying particular attention to the book, music and film industries. We have focused on five countries: Argentina, Colombia, Ecuador, Mexico and Spain.

As we shall try to show, digital technologies are having a significant impact on the cultural scene of Spain and Hispanic America, and the landscape of opportunities, barriers and policies associated with the protection and promotion of the diversity of cultural expressions in the digital era is highly complex. Following examination, new technologies cannot be said to be either positive or negative in themselves but instead can be regarded as both an advantage and a challenge, depending on how they are applied in each context: indeed, according to the way they are used, digital tools can, for example, generate a rich and dynamic market of cultural industries, or concentrate the supply in the hands of very few players. Public policies have a decisive influence in defining the outcome in either direction.

Within this framework, when it comes to protecting and promoting the diversity of cultural expressions in the new environment, the progress made by some countries could be extremely useful for others. Indeed, many of the policies and measures we have studied in relation to access, creativity, cultural industries and social engagement are clear success stories that could be replicated. However, beyond these initiatives, there are some less explored areas, which should also be taken into account. We are mainly referring to opportunities that are not being fully utilized, or challenges that are not being adequately addressed.

With regard to access, the public sector has made considerable efforts to reduce the digital divide. Nevertheless, these projects are often part of vast national infrastructure plans, the drafting and implementation of which usually involve the ministries of technology, industry, communications and education, among others, but not the ministry of culture – and this fact can have a negative impact in terms of the diversity of cultural expressions. Furthermore, in a context in which large international platforms are increasing pressure to provide infrastructure solutions, it is essential to insist that without public policies in this area, equitable access and net neutrality may be at risk.

From the viewpoint of creativity, countries have invested in platforms and applications that contribute to the visibility of local artists, training activities that help them to experiment and create with digital technologies and various measures to protect copyright. Nevertheless, cultural policies often remain too anchored in the analogue creation model – in which the message is communicated in one direction – and lose sight somewhat of the very paradigm of the new environment, which is characterized by interaction and collaboration.

Regarding cultural industries, support for professional networking, training and modernization, as well as the establishment of platforms that contribute to the consolidation of the book, music and film industries, are key initiatives. However, the challenges associated with large global platforms and their impact on the local creative chain are not receiving comprehensive treatment: without a firm strategy in this area, the problems can be exacerbated, both at the industry level and in terms of national statistics.

Finally, countries have carried out numerous projects for cultural dissemination and promotion of social engagement, particularly through outreach platforms, communication through social networks, public consultations, conferences and publications on culture in the digital era. Here there is a somewhat missed opportunity: the chance to raise awareness among the general public about the objectives and principles of the 2005 Convention and maintain a more explicit discussion on the impact of digital technologies on the diversity of cultural expressions.

At any rate, it is clear that for the culture of Spanish-speaking countries the digital age does not represent a possible future but rather a current reality. Although a great deal remains to be done to achieve a deep understanding of these processes in both quantitative and qualitative terms, we could postulate that the digital cultural space composed of Spain and Hispanic America is not something that has to be built from scratch but instead already exists and is developing in a highly dynamic manner.

At the same time, it is also apparent that there are marked contrasts between countries, with regard to numerous technological, economic and social particularities, and these local characteristics might have increasing weight in the future. For instance, many of the measures implemented in Spain are usually aligned with European integration programmes – as occurs with the Digital Single Market – while the digital agendas of the four Latin American countries studied tend to put the emphasis on reducing asymmetries and diversifying an economy that is overly dependent on primary exports. In the particular case of Colombia, new technologies take on an even more specific meaning: they are directly linked to peace building and the “post-conflict” period.

In future research on the relationship between digital and the diversity of cultural expressions in the Spanish-speaking countries, it will certainly be necessary to maintain this dual approach. On the one hand, we must continue to pay attention to the universal/common aspect involving a wide range of opportunities, challenges and policies that are repeated throughout the region. Secondly – to the extent that the available data permit – it will be essential to examine the local/specific component, defined by the particular situation and priorities of each country – unique features that might intensify over time. In a sense, this is the same duality we find in the idea of a shared language: the region has Spanish in common, but there are undeniable differences in dialect that must be taken into account. And, ultimately, if the aim is to consolidate the Spanish-speaking digital space in such a way as to promote and protect the diversity of cultural expressions, it will be vital to strengthen both pillars simultaneously: the regional exchange networks – of data, experiences, content and artistic expressions – and the constant work on specific local needs.

Introduction

In the past two decades, digital technologies have transformed the cultural scene profoundly. New forms of creation, production, distribution, access and participation have revolutionized entire industries, such as book publishing, music and film, in a process that has affected both the Global North and South.

Within UNESCO, close attention is being paid to this issue under the framework of the 2005 Convention on the Protection and Promotion of the Diversity of Cultural Expressions (hereinafter the 2005 Convention). The fact is that although the 2005 Convention does not explicitly mention the question of digital – since it only alludes, more generally, to “information and communication technologies” or “new technologies” – the principle of technological neutrality as set out in Article 4.1 makes it clear that its legal framework must apply to any environment – including the digital one.

References to digital issues have multiplied since the first quadrennial periodic reports on the implementation of the Convention were delivered in 2012.¹ An analysis of these documents and other contemporary trends² suggests that digital transversally affects the 4 major objectives underlying the 2005 Convention:³

- 1) the new technological context has dramatically reshaped the value chain, in a way that impacts the **sustainability of the systems of governance for culture**;
- 2) the technological disparities between North and South represent an obvious challenge when it comes to achieving a **balanced flow of cultural goods and services**;
- 3) while new technologies can help strengthen the local economic and social fabric, the emergence of large Internet platforms in the trade of cultural goods and services may complicate matters with regard to **integrating culture into a framework of sustainable development**.
- 4) the expansion of the Web as a space for creation, access and social participation renews the need to **promote freedom of expression, the right to privacy and human rights** in general.

It is in this context, characterized by both opportunities and challenges, that the organs of the 2005 Convention have made progress in drafting operational guidelines specifically oriented toward digital issues.⁴ The text will serve as a guide for interpreting the 2005 Convention in the digital context and will provide clear principles for implementing new cultural policies. At the same time, the monitoring framework proposed in the UNESCO Global Report *Re/Shaping Cultural Policies*⁵ will help to measure potential advances in protecting and promoting the diversity of cultural expressions in the digital environment.⁶

Another aspect to consider is that the impact of technology has global characteristics, but also displays local and regional particularities based on variables such as infrastructure, legislation and even language. In the latter case, it must be recognized that those countries that share the same language form a kind of common “digital territory”, within which recurrent opportunities and challenges can be observed. Now, if we bear in mind that nearly 470 million people have Spanish as their mother tongue,⁷ it is clear that studying these phenomena in the Spanish-speaking countries may prove to be a highly fruitful exercise, especially when it comes to devising new cultural strategies.

At this point, it must be stressed that the digital environment is gaining increasing importance in cultural policies in the Spanish-speaking region, although the approaches vary. The Economic Commission for Latin America and the Caribbean (ECLAC/CEPAL),⁸ for example, encourages the adoption of a digital agenda – eLAC2018 –,⁹ focused on different areas of the economy, including the development of content and applications. On the other hand, the Community of Latin American and Caribbean States (CELAC) promotes the Cultural Action Plan 2015-2020, which emphasizes the need to ensure free expression of cultural diversity on the Internet.¹⁰ However, it is perhaps at the Ibero-American scale that the intersection between the diversity of cultural expressions and the digital age is expressed most concisely. The Ibero-American Cultural Charter – an instrument

¹ The reports, submitted by Parties every four years, can be viewed at the following link: <http://en.unesco.org/creativity/monitoring-reporting/periodic-reports/available-reports>. The new form for the periodic reports, revised in June 2015, invites the Parties to provide details about digital technologies and the challenges they pose, in the sections entitled “Overview of the cultural policy context” and “Transversal issues”. A PDF version of this form is available here: http://en.unesco.org/creativity/sites/creativity/files/qpr_online_form_en_shorten.pdf

² Among the various research studies carried out on the diversity of cultural expressions in the digital age, we could mention Guèvremont *et al.* (2013), Kulesz (2014) and Lee and Lim (2015).

³ See UNESCO (2015b: 13).

⁴ See UNESCO (2015a).

⁵ See Anheier (2015: 31ff.).

⁶ For a summary of this framework, see section below, “Monitoring digital issues for the future”.

⁷ See Instituto Cervantes (2015: 5).

⁸ It should be noted that in the presentation we will refer to the situation in Ibero-America and Latin America, territories that do not, strictly speaking, correspond exactly to the Spanish-speaking region, as they include Portuguese-speaking countries such as Portugal and Brazil, but can prove very useful for analyzing common trends.

⁹ See ECLAC (2015a).

¹⁰ See CELAC (2015).

created in 2006 on the initiative of the Organization of Ibero-American States for Education, Science and Culture (OEI) to promote greater coordination and better cooperation among the countries of the region –¹¹ explicitly reaffirms the principles of the 2005 Convention and makes repeated reference to the issue of technology. In particular, the document calls for the region to “promote the development and use of new technologies as opportunities of creation, production, dissemination and promotion of cultural goods and services, likewise their contribution to the formation of new audiences and cultural exchange among countries”. Ten years on since the adoption of the Cultural Charter, these objectives are still valid and are now reflected in the Digital Cultural Agenda for Ibero-America, driven by the Ibero-American General Secretariat (SEGIB) with support from the OEI. Indeed, Article 14 of the Declaration of Veracruz, signed at the 24th Ibero-American Summit, in 2014, entitled “Education, innovation and culture in a changing world”, recommends:

*“entrusting SEGIB and OEI, in coordination with the Member States and the permanent working group established at the 17th Ibero-American Conference of Culture Ministers, to coordinate the launch of the Digital Cultural Agenda for Ibero-America that will contribute to the consolidation of the Ibero-American cultural space and its integration into the global information networks. The Agenda will promote digitization and society’s participation in digital culture, creative industries, the generation of local and shared content, and preservation of cultural heritage, recognizing the differences and asymmetries between countries, respecting national legal systems, cultural diversity, access to content and intellectual property.”*¹²

The Declaration sets out a very clear programme. The text, in line with previous documents, speaks of “consolidating” the Ibero-American cultural space and not “creating” it, which shows a strong commitment to integrating and improving what has already been achieved, instead of imposing solutions “from above”.¹³ In addition, the document precisely defines the main lines of action, in a context of promoting cultural diversity and respecting the sovereignty of each country: (1) the expansion of access; (2) the creation of local content; (3) the development of creative industries; (4) the participation of society; (5) the preservation of cultural heritage.

It is within this framework that we propose to examine the impact of digital technologies on the diversity of the cultural expressions in Spain and Hispanic America, paying particular attention to the book, music and film industries.¹⁴ We have focused on five countries: Argentina, Colombia, Ecuador, Mexico and Spain,¹⁵ giving priority in each case to the national point of view, although we

¹¹ See “Ibero-American Cultural Charter” (2006).

¹² See “Declaración de Veracruz” (2014).

¹³ See for example SEGIB (2013: 22): “Ultimately, we have many fragments of Ibero-American cultural space already built and this is what makes it right to speak of affirming or ‘consolidating’ the space, as in the Ibero-American Cultural Charter and the Declaration of the Ibero-American Summit in Cadiz, and not of ‘creating’ it. ‘Creating’ implies establishing something *ex novo*, while ‘consolidating’ means giving impetus to something that exists already. Indeed, the space already partly exists”.

¹⁴ Although the digital age has brought about a transformation of all the cultural industries, in this study we have focused the analysis on those three segments, since that is where the bulk of public policy in Spanish-speaking countries is aimed. This is particularly evident in the field of cooperation: the Ibero-American Cultural Charter, for example, seeks to “establish mechanisms of cooperation that promote a distribution of its cultural goods and services in the Ibero-American space and abroad, with special attention to the cinematographic and audiovisual sector, music and books”. Moreover, the incorporation of these three sectors enables us to make a preliminary assessment and establish quantitative and qualitative comparisons in a much more reliable manner than if we were dealing with other practices that are still emerging in the region – such as the use of new technologies in the performing arts – or that so far have received less attention from public policies. Nevertheless, as we will highlight in the final recommendations (Annex 1), one of the keys to consolidating the book, music and film industries might lie in establishing synergies with other creative sectors, such as animation or videogames. The impact of the latter on the diversity of cultural expressions should be the subject of further studies in the future.

¹⁵ This selection brings together the four countries with the largest GDP and population – Argentina, Colombia, Mexico and Spain –, which in fact cover highly diverse geographical areas – Europe, North America, the Southern Cone, the Andean Region, the Caribbean, the Amazon Region – and cultural contexts that – as we shall see – determine a wide variety of public policies; the inclusion of Ecuador – the headquarters of the UNESCO office for Bolivia, Colombia, Ecuador and Venezuela – has proved particularly important for understanding the Andean reality. Inevitably, this methodological choice leaves out many countries that could contribute important elements and should be the subject of further studies in the future. On the other hand, in this report we have not included references to the situation of the Spanish-speaking community in the United States, since we have concentrated only on those countries that are part of the 2005 Convention.

have also included some references to the provincial and municipal situation. On the other hand, given the changing nature of technologies, policies and stakeholders,¹⁶ we have not only consulted written sources, such as legislation, quadrennial periodic reports, statistics, sector inquiries and newspaper articles, among other documents,¹⁷ but have also used the direct testimonies of about 80 experts, artists, entrepreneurs and public sector representatives, whose generous contribution has been vital to understanding the local situation.¹⁸ To cover the broadest possible universe of trends, we have paid attention to the digitization of analogue cultural goods, their online distribution and dissemination and even the phenomena related to purely digital creation – as occurs with digital art.

Now, it must be noted that this study does not seek to provide a diagnosis of local digital culture or the technological progress of each country. It rather provides analysis of the specific way in which new technologies impact the diversity of cultural expressions¹⁹ within the region, with a clear emphasis on the opportunities and challenges posed and the policies implemented in recent years.

Nevertheless, it will be important not to lose sight of the local circumstances. Indeed, among the selected countries there are numerous socio-economic specificities that determine different priorities and issues. In terms of infrastructure, for example, Spain is aligned with European integration programmes – particularly the Digital Single Market – and enjoys a distinct advantage over Latin America.²⁰ At the same time, the economic crisis that began in 2008 has forced the Spanish cultural industries to seek new markets and become more competitive by every means possible. Latin American countries, meanwhile, have achieved improvements in broadband connectivity, although the gaps in access remain substantial and largely explain why e-commerce still represents a relatively small portion of the economy. Similarly, the current economic slowdown and falling prices of raw materials reinforce the urgent need to diversify sources of income. In the specific case of Argentina, a huge asymmetry exists in infrastructure, which separates the capital from other locations in that vast country. In Colombia there are intermediate cities – like Medellin and Cali – with greater relative importance, and the emphasis is placed especially on reducing the gaps between town and country, as well as on using all the tools available to consolidate peace. Disparities between urban and rural centers also affect Ecuador – a country characterized by a rich variety of cultures. Mexico – the most populous country in the Spanish-speaking region – is also home to an enormous diversity and a valuable historical legacy; its scale enables the implementation of major projects.

To address all of these issues, we have organized the presentation around 4 core themes, which correspond to key articles of the 2005 Convention:

- (1) Access to culture;²¹
- (2) Creativity;²²
- (3) Cultural industries;²³

¹⁶ This aspect is accentuated by the changes in the political circumstances of three of the countries analysed: Argentina elected a new government in December 2015; Spain is currently going through an electoral process; and Mexico recently dissolved the National Council for Culture and Arts (CONACULTA), to create the new Secretariat of Culture.

¹⁷ The quadrennial reports available to date are those of Argentina (2012 and 2016), Ecuador (2012), Spain (2012 and 2016) and Mexico (2012 and 2016). With regard to statistics, it is not always easy to locate up-to-date information about the phenomena under analysis here, which has made it necessary to seek out a variety of sources: the public sector in each country, national as well as international professional associations, regional and international bodies such as CERLALC, CEPAL/ECLAC, ITU, UIS (among others), market research companies like eMarketer or Deloitte, along with press articles. The sources specifically cited in this study are listed in Annex 3.

¹⁸ Annex 2 includes a list of all the main experts consulted. The interviews were carried forward between February and April 2016, and the vast majority were conducted face to face. The testimonies included in the text without a reference source have been extracted from these conversations.

¹⁹ It is important to note that here we are referring to the diversity of cultural expressions – in the strict sense provided in the 2005 Convention – and not to cultural diversity in general. This leaves aside issues such as heritage – whether tangible or intangible.

²⁰ Throughout the report, we will provide more detailed information on all these trends.

²¹ Articles 2.7, 4.6 and 7.1.

²² Articles 4.1, 4.3, 6.2, 7.2 and 10 (c).

(4) Participation of civil society and awareness-raising.²⁴

As we shall try to show, there is a wide range of policies in the region that, while not explicitly mentioning the 2005 Convention,²⁵ contribute specifically to protecting and promoting the diversity of cultural expressions in the digital era. The success stories and lessons learned might serve as inspiration to promote new projects, at either national or regional level.

1. Access

“Our countries tend to be very centralist: the bulk of the exchanges flow through the capitals. It is true that, in some cases, medium-sized cities carry a lot of weight – as occurs in Colombia with Medellín or Cali – but there is still much to be done throughout Latin America in terms of decentralization. And for cultural policies aimed in that direction, new technologies can become a valuable ally.”

Ángel Moreno
(assistant director of Cultural Practices at the Secretariat for Culture,
Recreation and Sport of the City of Bogotá – Colombia)

It is clear that new technologies imply major advantages in terms of access to culture.²⁶ First of all, digital distribution allows – at least in principle – books, music and cinema to reach every corner of a country much more effectively than in the past. This is particularly useful for nations with a large territory and rugged terrain: for example, in southern Argentina or in rural Colombia it might be easier to equip a small library with electronic books than with physical ones. Moreover, in a time characterized by the proliferation of increasingly powerful and affordable smartphones,²⁷ digital access to cultural goods and services is facilitated considerably.

It is also evident that in the digital age there are many more cultural offerings than users were formerly accustomed to. No record store could compete with the catalogue of Spotify, Pandora or other music streaming platforms. Moreover, thanks to the fact that the process of copying and downloading has virtually no cost, users can enjoy free access to thousands of public domain works.

However, we must not lose sight of the barriers that currently prevent citizens from making full use of these advantages. To begin with, the digital divide – between different socioeconomic sectors; between urban and rural areas; between the capital and the rest of the territory – that particularly affects Latin American countries has a negative impact on access: despite considerable progress in the past decade,²⁸ there are still marked disparities in the region in terms of grid connection infrastructure and equipment.²⁹ Another obstacle to access is the lack of cultural expressions available online. It is clear that without a content strategy, infrastructure policies are likely to be insufficient.

²³ Articles 4.5, 6.2 (c) and 10 (c). In terms of the cultural value chain, this section would correspond to the production and distribution stages.

²⁴ Articles 10 and 11. It is also worth noting that, in a context of readjustment of the creative chain, the areas examined may overlap: for example, the field of artists (creativity) is increasingly closer to the world of cultural industries, insofar as creators are more likely to self-publish and self-distribute their works. However, for the purposes of the study, we consider that the distinction between creativity (i.e. the artists' point of view) and cultural industries (i.e. the entrepreneurs' point of view) is still relevant.

²⁵ In fact, references to the 2005 Convention and the diversity of cultural expressions tend to be much more present in the field of international cooperation than in national policies. See García Leiva (2015).

²⁶ The benefits of new technologies in terms of access to culture are underscored in the reports of Argentina (2012: 4, 9, 15 and 16), Ecuador (2012: 13), Mexico (2016: 3) and Spain (2016: 31 and 66).

²⁷ According to recent data from Deloitte (2015: 2), Spain has a smartphone penetration rate of 88%, which ranks it above the European average (78%) and second globally, behind only Singapore (92%). In the case of Latin America, the number of smartphones has increased by 740% in the past four years; if this trend continues, the region will become the second largest mobile phone market by 2020 (See Granados, 2015).

²⁸ See ECLAC (2015b: 11).

²⁹ For a detailed account of these inequalities – both within each country and between different countries –, see ECLAC (2015b: 41ff.).

In this context, some foundations and large global platforms have proposed free or very low cost schemes so that people in developing countries may access the Internet. An example of this is FreeBasics,³⁰ initially called “Internet.org”, a project promoted by Facebook in conjunction with several phone operators, which has already taken its first steps to providing mobile technology access in Colombia, Peru and Bolivia, among other countries. An alternative proposal, which has just begun the testing stage in Latin America, is Loon,³¹ by Google: a network of balloons floating above the stratosphere providing connectivity to remote and rural areas. Nevertheless, these initiatives have been widely criticized, particularly because they can lead to disproportionate advantages for content and applications distributed by participating companies. In the “Open Letter to Mark Zuckerberg regarding Internet.org, Net Neutrality, Privacy and Security”, civil society organizations from several countries, including Colombia, Ecuador, Mexico and Spain, warned of the dangers that arise when the provision of access is in the hands of large private platforms:

*“We, the undersigned, share a common concern about the launch and expansion of Facebook’s Internet.org platform and its implications for the open Internet around the world. On that open Internet, all content, applications and services are treated equally, without any discrimination. We are especially concerned that access for impoverished people is construed as justification for violations of net neutrality.”*³²

The public sector has devoted great efforts to take full advantage of the opportunities and overcome many of the barriers described above. Below, we have listed some of the plans that the selected countries have implemented in recent years to improve access infrastructure:³³

(1) Argentina:

- **National Telecommunications Plan “Argentina Conectada”** (2010):³⁴ comprehensive strategy for improving connectivity in national territory.
- **Open Digital Television** (2009):³⁵ project for free universal access to over the air (OTA) broadcast TV, which includes explicit references to the issue of cultural diversity.³⁶
- **Cultural Equality National Plan** (2012):³⁷ programme aimed at promoting equal opportunities for the enjoyment of cultural goods and access to new forms of communication, under the theme “inclusion in diversity”.
- **Internet Federal Plan** (2016):³⁸ provision of quality broadband for 1,200 locations, aimed at reducing connectivity asymmetries. The project will be complemented by the Digital Country plan, to be launched shortly.³⁹

(2) Colombia:

- **“Vive Digital” Plan** (2014):⁴⁰ the second edition of the successful programme launched in 2010 covers a very wide range of areas; in terms of infrastructure it aims to significantly improve access to the Internet, particularly in rural areas, install free WiFi points and expand the coverage of digital TV, among other things.⁴¹

³⁰ <https://info.internet.org/en/story/free-basics-from-internet-org/>

³¹ <http://www.google.com.ar/intl/es-419/loon/>

³² See “Open Letter” (2015).

³³ In the list we have not included device delivery programmes, such as “**Conectar Igualdad**” (Connect Equality) (Argentina, 2010) and “**Tabletas para educar**” (Tablets for education) (Colombia, 2014), which, although they have an impact on access to culture, are more focused on the school context.

³⁴ www.enacom.gob.ar/multimedia/normativas/2010/Decreto%201552_10.pdf

³⁵ <http://www.tda.gob.ar/>

³⁶ <http://www.tda.gob.ar/tda/141/11165/consejo-asesor.html>.

³⁷ <http://www.cultura.gob.ar/acciones/plan-nacional-igualdad-cultural/>

³⁸ <http://www.argentina.gob.ar/planfederaldeinternet>

³⁹ See “Plan Federal de Internet” (2016).

⁴⁰ <http://www.vivedigital.gov.co/>

⁴¹ The 2010-2014 edition of the programme achieved, and at times surpassed, the goals initially set. All the quantitative and qualitative progress can be viewed on the Colombian Ministry of Information and Communication Technologies’ website. See MinTIC (undated)

(3) Ecuador:

- **National Plan for Good Living** (2013):⁴² a far-reaching plan, with a distinct infrastructure, access and connectivity component. The plan aims to provide public telecommunications and ICT services, including radio and television broadcasting.
- **National Broadband Development Plan** (2011):⁴³ deployment of broadband infrastructure, mainly between the least serviced sectors.

(4) Mexico:

- **National Digital Strategy** (2013):⁴⁴ a comprehensive programme to modernize the country, with emphasis on improving connectivity, e-commerce, education, health, security and public services.
- **“México Conectado”** (2013):⁴⁵ implementation of the policies and actions necessary to provide access to broadband in public spaces.
- **Communications and Transport Sectoral Programme** (2013):⁴⁶ a project aimed at optimizing the coverage, connectivity and accessibility of communications in the field of television, radio, telephone and data, among other things.

(5) Spain:

- **Digital Agenda for Spain** (2013):⁴⁷ a national strategy that integrates all plans to develop the economy and the digital society, along multiple lines including, in particular, the deployment of networks and services to guarantee connectivity and improve the performance of digital television. The plan is linked with the Digital Agenda for Europe and the European Digital Single Market.⁴⁸

Case Study 1: Vive Digital Plan (Colombia)

The Ministry of Information and Communication Technologies (MinTIC) implemented its “Plan Vive Digital” in 2010, initially for a four-year term. The aim of the project was to shore up the Colombian “digital ecosystem”, consisting of four main components: services, applications, users and infrastructure. The programme’s success led to the launch of a second edition, for the 2014-2018 period. The multiple virtues of the Vive Digital plan include most notably: a comprehensive view of the topic of digital technologies – with the focus placed not only on access but also on creativity and content industries –, the establishment of new inter-ministerial synergies – for example, between MinTic and the Ministry of Culture – and the possibility of designing long-term state policies, linked to local actors, among others. The programme has repositioned Colombia at the centre of the region’s digital scene and has become an inescapable reference for other Spanish-speaking countries.

It is worth emphasizing that policies to improve infrastructure often include the establishment of community centres equipped with computers and Internet connection, which function as spaces of social inclusion, particularly in disadvantaged areas. In Argentina, for example, there are **Centres of Access to Knowledge** (*Núcleos de Acceso al Conocimiento* - NAC),⁴⁹ that form part of the “*Argentina Conectada*” plan. Colombia, meanwhile, has installed “**Vive Digital**” **Centres**⁵⁰ and

⁴² <http://www.buenvivir.gob.ec/>

⁴³ <http://www.telecomunicaciones.gob.ec/plan-nacional-de-desarrollo-de-banda-ancha/>

⁴⁴ <http://www.gob.mx/mexicodigital/>

⁴⁵ <http://www.mexicoconectado.gob.mx/>

⁴⁶ http://www.sct.gob.mx/fileadmin/banners/Programa_Sectorial_de_Comunicaciones_y_Transportes.pdf

⁴⁷ <http://www.agendadigital.gob.es/>

⁴⁸ <http://ec.europa.eu/digital-agenda/>

⁴⁹ <http://www.nac.gob.ar/>

⁵⁰ <http://www.mintic.gov.co/portal/vivedigital/612/w3-propertyvalue-669.html>

Kiosks:⁵¹ these points, located in municipal capitals and rural towns, act as access centres, with a clear focus placed on integration for peace.⁵² Since 2003, Spain has built a vast network of telecentres,⁵³ currently managed by the autonomous communities, providing Internet access to rural populations. In Ecuador, there are **Community Information Centres**,⁵⁴ and Mexico has established “**México Conectado**” centres.⁵⁵

Countries have also carried out a number of initiatives to facilitate citizens’ access to cultural expressions online, particularly through virtual libraries, museums and archives.⁵⁶ In August 2014, the National Library of Argentina launched **Trapalanda**,⁵⁷ a platform that incorporates its digital collections and, in addition to historical material, displays many recent publications that are free to download. In 2012, under the Cultural Equality plan, Argentina inaugurated the **Music Bank**,⁵⁸ a platform offering free access to musical content – both in the public domain and donated by their creators. Argentina also has the **Open Digital Content** (*Contenidos Digitales Abiertos – CDA*)⁵⁹ and the **Argentine Bank of Universal Audiovisual Content** (BACUA) portals,⁶⁰ offering an assortment of digital resources.

In Colombia, the National Library⁶¹ organizes virtual exhibitions on historical themes as well as contemporary issues. Since 2015, the library has also offered a selection of e-books for free online reading, such as the Colombian Comic Anthology.⁶² The National Museum, on the other hand, has a virtual section whose works include not only heritage but also contemporary cultural expressions.⁶³

In the case of Ecuador, since 2014, the Eugenio Espejo National Library⁶⁴ has undertaken various modernization measures aiming to digitize material that will be offered free to download.⁶⁵

The National Library of Spain has many digital collections, gathered in the **Hispanic Digital Library**.⁶⁶ Readers can access the material online and, for certain works, are even able to purchase a printed copy on demand.⁶⁷ In the area of museums, Spain has a high level of digitization, both in terms of variety and quality of the multimedia material available as well as the abundance of associated metadata.⁶⁸ In 2009, **Hispana**⁶⁹ was established, a portal for access to Spanish digital culture consisting of digital material from public and private institutions, which acts as a national aggregator for the European platform. Furthermore, the Ministry of Education, Culture

51 <http://www.mintic.gov.co/portal/vivedigital/612/w3-propertyvalue-7059.html>

52 As occurs with the Peace Points programme. See Arana (2016).

53 www.red.es/redes/actuaciones/5/98

54 <http://www.telecomunicaciones.gob.ec/infocentros-comunitarios/>

55 <http://www.pmc.gob.mx/>

56 In the area of libraries, museums and archives, the matter of heritage partly re-emerges, which, as we noted in the introduction, is not addressed by this study. For this reason, we have excluded those digital projects that are specifically related to preservation. We have, nonetheless, included initiatives of interest for the protection and promotion of the diversity of cultural expressions, to the extent that they provide access to different online content. It is also important to note that some of the cases mentioned in this section are related to those under section 3 (cultural industries), for example, those concerning video on demand. For the purpose of the presentation, we have included in section 1 the initiatives whose main objective is linked to securing access (i.e., focusing on the user), while in section 3 we refer to projects that, while also providing free material, aim to consolidate or give visibility to a particular sector (i.e. focusing on the industry). A similar distinction could be made for the digital initiatives of museums: if the emphasis is on access, they could be included in section 1, whereas if it is on promoting the participation of society, they should come under section 4.

57 <http://trapalanda.bn.gov.ar/>

58 www.bancodelamusica.gob.ar

59 <http://cda.gob.ar/>

60 <http://www.bacua.gob.ar/>

61 <http://www.bibliotecanacional.gov.co/content/biblioteca-digital>

62 <http://www.bibliotecanacional.gov.co/content/antolog%C3%AD-de-comic-colombiano-libro-digital>

63 See for example the online exhibition “*Nación Rock*”:

http://www.museonacional.gov.co/sitio/rockvirtual/swf/Menu_principal.html

<http://biblioteca.casadelacultura.gob.ec/>

64 See “Biblioteca Nacional” (2015).

65 <http://www.bne.es/es/Catalogos/BibliotecaDigitalHispanica/Colecciones/>

66 See, for example: <http://bdh.bne.es/bnesearch/Search.do?destacadas1=Bubok&home=true>

67 See for example the multimedia section of the Reina Sofia Museum (<http://www.museoreinasofia.es/multimedia>) and that of the Prado Museum

(<https://www.museodelprado.es/actualidad/videos>).

68 <http://hispana.mcu.es>. The project is heir to the Directory and Collector of Digital Resources.

and Sport (MECD) developed the website **CER.es**⁷⁰ (“*Colecciones en red*” – “Networked Collections”) which enables the public to view and learn more about the works exhibited in 95 museums in Spain.

In Mexico, the National Library also has its own digital space.⁷¹ Furthermore, in May 2010, four cultural institutions launched the **Mexican Digital Library**.⁷² This portal currently centralizes the works of 13 national libraries and archives. In addition, within the framework of the Secretariat of Culture's Digital Agenda,⁷³ Mexico is developing repositories for different artistic areas, as well as audio, audiovisual and museum collections, among others.⁷⁴

From the viewpoint of cooperation, the *Ibermuseos* and *Iberbibliotecas* programmes enable the countries of the region to build a fruitful exchange in the fields of modernization and digitization.⁷⁵ Moreover, in 2012, the Association of Ibero-American National Libraries (ABINIA) posted on line the **Digital Library of Ibero-American Heritage** (BDPI),⁷⁶ which provides participating libraries with a point of access to digital resources.⁷⁷ We must also highlight the ***Señal que nos une*** project:⁷⁸ this Ibero-American satellite television channel, established in 2015, in compliance with the resolutions of the 24th Ibero-American Summit relating to the Digital Cultural Agenda, aims to disseminate cultural content from the 22 countries of the community.

2. Creativity

The digital age has an impact not only on access but also on creativity and on the status of artists. First, it is clear that local creators in general can gain greater visibility thanks to new technologies. Independent musicians, for example, now have a multitude of digital tools allowing them to distribute and promote their albums on the Internet and communicate directly with their public.

In addition to opening up new channels for dissemination, the digital age has brought about huge changes at the very heart of creation. The proliferation of connected devices and the rapid expansion of applications for self-publishing have enabled all users/consumers to become potential artists. Here we can cite the experience of the Colombian musician Carlos Muñoz, who became famous for having recorded and edited an entire album using his mobile phone. When asked about how technology impacts creativity, he said:

*“Technology contributes a lot to the cultural development of society. I think that digital artisans are being formed, people who are making art and creating a new world.”*⁷⁹

Furthermore, we are witnessing an intense transformation of forms of expression, which are gradually intertwining with the new tools. According to the Argentine filmmaker Daniel Burman, we are going through a profound paradigm shift:

*“Technology is no longer “nice to have” but has become part of the content. Media tend to be confused with the artistic content it displays. (...) We have to start incorporating technology in our creative processes. Technology needs to stop being a mere platform or a means to an end. Technology is not a result but a process”.*⁸⁰

⁷⁰ <http://ceres.mcu.es>

⁷¹ http://catalogo.iib.unam.mx/F/-/?func=login&local_base=BNDM

⁷² <http://bdmx.mx>

⁷³ The Mexican Digital Cultural Agenda is derived directly from the National Digital Strategy: it is the number 13 secondary objective, which is part of the main objective “Quality Education”.

⁷⁴ In section 3, we will discuss the initiative linked with books (“*Libros México*”).

⁷⁵ Digital technologies hold an increasingly important role in both programmes, as follows from the topic of the 8th Ibero-American Meeting of Museums and the 15th session of the Intergovernmental Committee of Ibero-Libraries.

⁷⁶ <http://www.iberamericadigital.net>

⁷⁷ Once again, although it is clear from its name that the BDPI deals with heritage, this case can serve as an example of a means of cooperation in terms of access to digital content. Many participating libraries contribute not only with historical material but also with contemporary cultural expressions. One example is the National Library of Argentina, which puts online concerts by contemporary artists such as Leo Sujatovich and Ricardo Mollo, among others.

⁷⁸ <http://www.ibe.tv/es/canal/iberoamericano>.

⁷⁹ See “Colombiano produce” (2015).

⁸⁰ Blanc, Lhermitte and Perrin (2015: 97).

In this regard, we must recognize that digital culture is not only linked with the digitization of analogue expressions, but it also refers to a highly dynamic space in which multimedia modalities, crossmedia, transmedia, augmented reality and virtual reality all coexist.⁸¹ In the region, the activities carried out by independent festivals and various centres that have pioneered digital art demonstrate the great potential of these new forms of expression.⁸²

However, the digital landscape is not without risks. Although digital tools increase dissemination possibilities, paradoxically, the exponential growth in content offerings from around the world sometimes has the opposite effect: it results in a glut that may detract attention from local artists.

With regard to the production possibilities offered by the new context, it is important to recognize that technology alone is not enough to foster creation. Without training, experimentation and active utilisation of the digital tools by local users, the mere provision of devices or applications not only adds nothing to the initial situation but may even worsen it. The challenge has been clearly identified by Colombia's Ministry of Culture in its Digital Culture Policy document, dated 2009:

“In cultural terms, [the provision of technology and connectivity] is insufficient, as their uses are not only forms of data circulation but are also sparking a massive cultural revolution worldwide. Experiences suggest that the process of providing computers and connectivity, without respect or stimuli for cultural processes, can fragment the cultural identities of societies or communities.”⁸³

According to Germán Franco – assistant director of the Ático Centre at the Pontifical Xavierian University in Bogotá and expert on communication policy and digital culture –, the problem arises at not only the national but also Latin American level:

“Traditionally, it was thought that a project developed in the field of digital culture needed information, devices and connectivity. But we should not put that at the core: the most important thing is people and their ability to create. The crucial thing here is culture, collective practices, representations, and deep motivations. And I think that Latin America can do much more. We should take advantage of the new tools, but to tell our story as a region.”

Several respondents also point out that neither the market nor the public sector have taken due note of the new reality. In the case of digital art, it is clear that publicity and marketing channels are still overly attached to the analogue world.⁸⁴ Although there are many artists, researchers and teachers working in the field of digital culture in the broadest sense, the region has not yet managed to establish a common space for linking all these actors. From the perspective of Felipe Londoño, rector of the University of Caldas (Colombia) and director of the International Festival of the Image,⁸⁵ the underlying problem is that public policies have not fully assimilated the new logics of creation:

“It is essential to review the concept of culture from the perspective of social and technological changes in today's world. The current agenda of public policies must take into account the creation of collaborative platforms that allow people to work with open data, free licenses, electronic networks and open source software that allow the empowerment of communities, resulting in the expansion of a new participatory model in the construction of knowledge and culture.”

From Spain, Marcos García – director of MediaLab Prado – offers a similar diagnosis:

“Cultural policies have usually been envisaged in terms of access. However, we must also think about production policies, that is to say, moving from a transmission-based approach to one based on creation, which makes available places where audiences can actively take part in the production process”.

⁸¹ See Kulesz (2014: 10).

⁸² Here we could mention several projects that have emerged in Spain, such as Artfutura (<http://www.artfutura.org>) and Sónar (<https://sonar.es>) festivals, and the Espacio Fundación Telefónica (<https://espacio.fundaciontelefonica.com>).

⁸³ Ministerio de Cultura (2009: 478).

⁸⁴ See Waelder, P. (2016: 45 ff).

⁸⁵ See below.

Another point on which the respondents agree is that the systems for registering digital works are not sufficiently well developed. For example, in many countries in the region, any writer who wishes to carry out the procedures for registration and the legal deposit of their e-book has to visit the public office in person, take a copy of their work on a CD or DVD and fill out various forms by hand. This lack of modernization has very negative effects because copies stored on CDs or DVDs deteriorate rapidly; moreover, national statistics are affected because many authors end up preferring to ignore national procedures and directly upload their works onto large global platforms.⁸⁶ An equally problematic aspect – also frequently mentioned – is piracy.⁸⁷

In this context of opportunities and challenges, numerous initiatives have been launched to enhance creation and the situation of artists. Among the projects designed to increase the visibility of local creators and productions, we could highlight the **Latitud1x1**⁸⁸ platform, launched in March 2016 by Ecuador's Superintendency of Information and Communication (SUPERCOM). This portal enables Ecuadorian musicians to promote their work and monitor its dissemination. It not only facilitates the circulation of Ecuadorian music – in compliance with Article 103 of the Communications Law,⁸⁹ which states that on radio stations, at least 50% of the music produced, composed or performed in Ecuador must be represented in musical content broadcast at all times – but also encourages artists to record their work and join collective management organisations.

Case Study 2: Latitud1x1 (Ecuador)

Launched in March 2016 by Ecuador's Superintendency of Information and Communication (SUPERCOM), the Latitud1x1 platform enables Ecuadorian musicians to promote their songs and control their dissemination in the media. The measure not only facilitates the circulation of Ecuadorian music but also encourages creators to register their works and join collective management organizations. It is an initiative that has a favorable impact on the local cultural ecosystem, in particular on the situation of artists, in terms of both visibility and financial remuneration.

It is interesting to observe that in Ecuador, technological solutions have been developed that have a positive impact on the visibility of local art, both in digital and analogue environments. One interesting example is the project “**Muros Libres**” (Free Walls).⁹⁰ This application, launched by the economic development agency ConQuito⁹¹ and the Metropolitan District of Quito, aims to support graffiti as an art form and to minimize vandalism. The city offers specific walls in public areas for artists to paint; then, the digital platform helps to coordinate action and facilitate meetings between owners of private walls and artists.⁹²

In the field of training, it should be noted that in the community access centres mentioned in section 1, courses are generally offered – mostly free of charge – to train users in digital arts and crafts, such as 3D animation, digital photography, applications and visual effects. More importantly, in recent years, a number of spaces have emerged – many of which also have public support – dedicated to experimentation with new technologies, operating as centres of learning and creation. Some noteworthy examples are as follows:

- **ViveLabs** (Colombia):⁹³ network of citizen innovation laboratories seeking to promote collaborative creation and development of digital content, under the “Vive Digital” plan. The Bogota ViveLab is operated by the National University.
- **MediaLab UIO** (Ecuador):⁹⁴ laboratory for art, communication, culture and society, sponsored by the International Centre of Advanced Communication Studies for Latin America (CIESPAL).

⁸⁶ See Gil (2015).

⁸⁷ In the following section we will examine the economic dimension of this challenge.

⁸⁸ <http://latitud1x1.ec.supercom.gob.ec>

⁸⁹ <http://www.presidencia.gob.ec/wp-content/uploads/downloads/2013/08/LeyDeComunicacion-espaniol.pdf>

⁹⁰ <https://play.google.com/store/apps/details?id=com.neptuno.ml&hl=en>

⁹¹ <http://www.conquito.org.ec/>

⁹² See “150 artistas urbanos” (2014).

⁹³ <http://www.mintic.gov.co/portal/vivedigital/612/w3-article-4055.html>

- **MediaLab Prado** (Spain):⁹⁵ established on the initiative of Madrid City Council, this laboratory of citizen production, research and dissemination of cultural projects promotes different forms of experimentation and collaborative learning stemming from digital networks.
- **LABoral** (Spain):⁹⁶ this multidisciplinary institution, established in Gijón, produces and disseminates new cultural forms arising from the use of information and communication technologies.
- **Laboratorio Arte Alameda** (Mexico):⁹⁷ space belonging to the National Institute of Fine Arts (INBA), dedicated to the production of and research into artistic practices that establish a dialogue between art and technology.
- **Centro de Cultura Digital** (Digital Culture Center) (Mexico):⁹⁸ this multifunctional and multidisciplinary centre, founded on the initiative of the Secretariat of Culture, conducts numerous advocacy and training activities that are vital for creation in the digital environment.⁹⁹
- **Centro Multimedia** (Mexico):¹⁰⁰ project sponsored by the National Arts Centre (CENART) supporting the training of artists and audiences interested in electronic art.
- **Laboratorio de ciudadanía digital** (Mexico and Spain): space for training, developed by the Spanish Cultural Centre in Mexico, the Telefónica Foundation and the *Ateneo Español de México*, in order to stimulate, among other things, the application of new technologies in art and culture.

Case Study 3: Digital Culture Centre (Mexico)

Inaugurated in September 2012 on the initiative of the Mexican Secretariat of Culture, the Digital Culture Centre focuses on researching the cultural, social and economic implications of digital technology use. The centre seeks, among other aims, to: promote the conscious adoption of digital tools that encourage the exchange of knowledge and information, critical reading, self-management, the production of quality content and network creation. This is a pioneering initiative in the region, which will no doubt prove to be fundamental for stimulating creativity and exploring the forms of expression that characterize the digital age.

In terms of stimulating digital creativity, one noteworthy programme is “*Crea Digital*”,¹⁰¹ sponsored since 2012 by the Ministry of Culture and the Ministry of Information and Communication Technologies (ICTs) of Colombia under the “*Vive Digital*” plan. With an approach fully in line with the principles of the abovementioned Digital Culture Policy document, “*Crea Digital*” has provided funding to creators of digital content interested in developing projects promoting culture, literacy and experimentation with ICTs. As highlighted by several of the Colombians interviewed, this programme has had many virtues, including a strong commitment to inter-ministerial synergy. In addition to supporting initiatives related to e-books, animation and videogames, in its 2016 edition,¹⁰² *Crea Digital* has included a new category – “content for a culture of peace” – in order to provide incentives for any creators of digital content who are interested in contributing to the consolidation of a culture of peaceful coexistence and participation.

⁹⁴ <http://www.medialabuio.org/>

⁹⁵ <http://medialab-prado.es/>

⁹⁶ <http://www.laboralcentrodearte.org/>

⁹⁷ <http://www.artelameda.bellasartes.gob.mx>

⁹⁸ <http://www.centroculturaldigital.mx>

⁹⁹ See “Brinda el Centro de Cultura Digital talleres” (2016).

¹⁰⁰ <http://cmm.cenart.gob.mx/>

¹⁰¹ <http://www.mincultura.gov.co/areas/comunicaciones/convocatorias/Documents/CREADIGITAL2015.pdf>

¹⁰² <http://www.mincultura.gov.co/areas/comunicaciones/cultura-digital/creadigital/convocatoria2016/Paginas/default.aspx>

As we pointed out in the analysis of opportunities, numerous festivals and exhibitions dedicated to digital art have sprung up in the region. Several of these events have been supported by public institutions. Here we could mention the following examples:

- **Electronic November** (Argentina):¹⁰³ meeting dedicated to art, technology and digital culture, held by the San Martín Cultural Centre in Buenos Aires.
- **International Image Festival** (Colombia):¹⁰⁴ event organized by the Department of Visual Design of the University of Caldas, which has established itself as a major reference for the whole of Latin America in the field of electronic arts.
- **Electronic Arts Festival/Video Transitio_MX** (Mexico):¹⁰⁵ this event – sponsored by the CENART – is devoted to the expression and analysis of contemporary artistic practices linked to technology.
- **Digital Writers’ Festival** (Mexico): meeting organized by the Secretariat of Culture – through the National Coordination of Literature – which explores forms of literary creation on digital platforms such as Twitter.¹⁰⁶

Regarding the protection of copyright, countries have launched various initiatives. Colombia’s National Copyright Directorate (DNDA)¹⁰⁷ has developed a set of virtual courses for copyright holders and users of related rights, artistic and cultural training centres, private and public organizations, collective management societies, universities and colleges interested in the subject. So far, more than 115,000 people have participated in the courses.¹⁰⁸ In terms of online registration of unpublished works, Colombia’s DNDA is a pioneer in Latin America. In late 2015, the Directorate launched an application called “*Protege tus obras*” (Protect your works)¹⁰⁹ – a mobile service that enables users to register videos and photographs taken on a mobile phone or tablet. Furthermore, also in Colombia, the National Library offers digital legal deposit for texts, images, videos, audio, digital maps and websites.

Spain, meanwhile, has changed the revised text on intellectual property and amended the Civil Procedure Law 1/2000, thus speeding up the request for withdrawal of links to illegal content, cancellation of .es domain names and blocking of foreign websites that infringe rights. In addition, in 2011, the MECD inaugurated the programme “*Cultura en positivo*”,¹¹⁰ which promotes, through a quality web seal, the enforcement of intellectual property rights.¹¹¹

3. Cultural industries

“In the digital age, physical borders are no longer as significant as languages. In that sense, we have a clear advantage over other countries whose language is less widely spoken – for example, the Dutch. And Spanish is no longer the exclusive patrimony of Spain. For example, the most visited website in Spain is YouTube, especially for content in Spanish or dubbed into Spanish that is not from Spain but from other Spanish-speaking regions.”

Borja Adsuara
(lawyer, university lecturer and expert consultant
on law and digital strategy – Spain)

¹⁰³ <http://www.noviembreelectronico.elculturalsanmartin.org/>

¹⁰⁴ <http://www.festivaldelaimagen.com/>

¹⁰⁵ <http://transitiomx.net/inicio.html>

¹⁰⁶ See “Creación literaria en redes sociales” (2016).

¹⁰⁷ <http://derechodeautor.gov.co/>

¹⁰⁸ See “Programa de difusión de derecho de autor” (2016).

¹⁰⁹ <https://itunes.apple.com/us/app/protege-tus-obras/id1055375729?l=es&mt=8>

¹¹⁰ <http://www.culturaenpositivo.mecd.gob.es/es/index.html>

¹¹¹ A more complete list of anti-piracy initiatives carried out by the Ministry can be found here: <http://www.mecd.gob.es/cultura-mecd/areas-cultura/propiedadintelectual/lucha-contra-la-pirateria.html>

The advantages of new technologies in the field of cultural industries are undeniable. The digital age makes it possible to reduce distribution costs – leading to considerable savings for companies –, implement innovative financing methods such as crowdfunding or micro-patronage and develop new business models, while providing the potential to reach a global market. Indeed, the “digital territory” made up of Spanish-speaking countries offers enormous potential in terms of commercial and professional exchange.¹¹²

In the region, cultural industries are taking advantage of all these opportunities and in many cases are actively incorporating new technologies. Cinemas are gradually migrating to digital technology, although at different rates in each country,¹¹³ and the explosion of video on demand (VOD) services is giving new life to many niche works, both classical and contemporary, which are resurfacing thanks to the long tail effect.¹¹⁴ With regard to music, in the specific case of Latin America, digital revenues increased by 44.5% in 2015, and within this group, the proportion corresponding to streaming grew by no less than 80.4%.¹¹⁵ In the publishing industry, although the proportion of e-book sales is still not dominant, it is continuing to rise in the production and registration figures.¹¹⁶

Within this framework, it is important to recognize that the economic situation of the region itself turns new technologies into a potential ally for the cultural industries. Indeed, at a time characterized by weak domestic demand – in Spain, as a result of the crisis affecting many European economies since 2008, and in Latin America, due to the drop in the price of raw materials and the recession –¹¹⁷ it is essential to find new markets. For the cultural sector, exports of goods and services in digital format could represent a source of additional income.

However, there are also considerable barriers. First of all, as is the case for artists, cultural industries, especially small and medium-sized enterprises, often lack the necessary digital tools and skills. Moreover, while it is true that in many cases the new environment enables costs to be brought down, migration from analogue to digital is often very expensive: for example, scanning the entire backlist of a publishing house can incur a great expense that small companies find difficult to bear. Furthermore, consumer practices of the new environment break with traditional modes of distribution and require the permanent readjustment of business models.¹¹⁸

In the specific case of Latin America, many analysts warn that the digital economy has not developed to the same extent as connectivity. In many of these countries, the digital industry lacks indigenous development.¹¹⁹ In line with the principles established by Colombia’s Ministry of Culture in its Digital Culture Policy document, the Argentine researcher Raúl Katz warns about the problems that arise whenever we lose sight of the domestic digital industry:

*“To date, decision-making centres of Latin American governments have focused on network development, broadband deployment and access prices. Without losing sight of the fact that there is still work to be done in these areas, especially with regard to the digital inclusion of vulnerable sectors, the fact is that governments and companies, researchers and scholars must begin to define a vision for the future, based on an integrated vision of the digital ecosystem. Otherwise, we run the risk of becoming consumers of products, applications and content generated outside the continent – a process that supports the transfer of income outside Latin America.”*¹²⁰

¹¹² A good summary of the economic weight of the Spanish language can be found in Instituto Cervantes (2015: 20 ff).

¹¹³ Spain leads the region, with 95.1% of digitized cinemas (see AIMC, 2016). In Latin America, the situation is rather uneven (for statistics on the proportion of digital cinemas out of the total number of cinemas data is available from the Ibero-American Audiovisual Observatory: <http://www.oia-caci.org/es/estadisticas/cines/> and <http://www.oia-caci.org/es/estadisticas/teatro-digital-incluyendo-3d/>)

¹¹⁴ See Anderson (undated).

¹¹⁵ See IFPI (2016: 11).

¹¹⁶ See CERLALC (2016: 8).

¹¹⁷ See IMF (2016).

¹¹⁸ For more detailed consideration of how new technologies impact reading, writing and the book value chain, see CERLALC (2013).

¹¹⁹ See Katz (2015: 232). E-commerce in the region accounts for a mere 2% of the total economy – a much lower proportion than that found in Europe or the United States (see ECLAC, 2015b: 68).

¹²⁰ Katz (2015: 333).

This phenomenon may lead to a particularly negative result in terms of employment and local capacities. Indeed, the most talented in each industry often receive more tempting job offers from abroad and choose to emigrate, which further weakens the national ecosystem.

On the other hand, although it is true that the digital age allows the monetization of long-tail and niche sales, it is not sure that all companies can survive thanks to those trade patterns. In fact, there is a danger that large platforms may be the only ones – thanks to their unique ability to accumulate millions of different products and process big data – that will benefit from the long tail of products consumed by a relatively small number of users but which, in total, result in considerable economic returns. Thus, although the region has a multitude of VOD platforms, Netflix accounts for around 70% of Mexico’s users in this sector;¹²¹ meanwhile, the group of global players comprising Amazon, Apple, Google and Kobo accounts for 77.2% of the Spanish e-book market.¹²²

Many testimonials agree that the concentration of supply in the hands of a few platforms could pose a serious risk to the sustainability of local industries, and therefore to the diversity of cultural expressions. Indeed, it must be acknowledged that the giants of the Internet do not represent a simple link in the creative chain, but are gradually becoming markets that are closed in on themselves, something that is clearly seen in the field of applications, where Google and Apple are literally marketplaces. Since each platform can choose specific file and metadata formats, there is a risk that interoperability may be weakened and fragmentation intensified. Moreover, to the extent that they manage their own recommendation algorithms, large platforms can also control the visibility of the various products that they offer for sale. As warned by the “Statement on the protection and promotion of cultural diversity in the digital era”:

*“In the new digital networks and supports, there is a process of re-mediation by new agents – such as Google, YouTube, Facebook, Spotify etc. The alliances between these agents and traditional media and cultural conglomerates question the diversity of the digital networks (...). It is necessary to do further research about the strategies developed by these intermediaries within the digital landscape in sensitive topics such as the alliances between the large culture-communication groups, the labelling of contents or the secret algorithms deployed in the search engines that guide the visibility of contents.”*¹²³

The predominance of the Internet giants in the cultural scene is so strong that it may result in an additional danger: the inability to produce reliable national statistics on the economy of digital culture. Since exchanges of information between the user and the cloud – that is to say, the platform – are conducted electronically and are generally encrypted, States do not always have the means to establish which and how many goods and services have been consumed or produced by local users. So, as noted in section 2, just as it is becoming increasingly complex to determine how many e-books by local authors have been published in a given period, the same problem exists concerning how many copies have been sold.

Moreover, in addition to the progress of large platforms, another challenge that has been identified is piracy and unauthorized downloads.¹²⁴ This phenomenon concerns not only Latin America¹²⁵ but also Europe: according to Spain’s Coalition of Content Creators and Industries, 87.48% of content consumed in Spain in 2015 was illegal, representing a loss in profits of €1,669 million.¹²⁶

¹²¹ See Castañares (2016).

¹²² Librandá (2016: 7).

¹²³ “Statement” (2013: 3). The text was drawn up in the framework of the seminar “Protection and promotion of audiovisual diversity in the digital era”, organized in October 2013 in Getafe by the Audiovisual Diversity project (see below, section 4).

¹²⁴ It is perhaps in the 2016 periodic report of Spain (“Executive Summary” section) that this problem is most clearly underlined.

¹²⁵ See Alianza (2016).

¹²⁶ See Observatorio (2016). However, it should be noted that the calculations used to estimate the loss of earnings have been challenged repeatedly (see Corroto, 2015).

Furthermore, changes in consumer habits can negatively affect cultural circuits that typically use analogue technology, such as physical book shops. In Spain, for example, an average of two bookshops per day closed down in 2014.¹²⁷ Although there are major differences between the ecosystems of bookshops in Spain and Latin America, one might wonder whether the situation in Spain is perhaps foretelling what might happen in the future in Argentina, Mexico, Colombia and Ecuador, as digitization progresses.

Against this backdrop of opportunities and challenges affecting cultural industries, countries have implemented a wide range of policies and measures. One group of initiatives taken relates to training, professional networking and modernization,¹²⁸ such as the following:

- **Programa Polos y Nodos Audiovisuales** (Argentina):¹²⁹ promoted by the Ministry of Federal Planning, Public Investment and Services, this project aims to consolidate the local audiovisual industry through assistance in equipment, training and research and development, focusing on the production of content for digital TV.
- **Colombia 3.0** (Colombia):¹³⁰ training and exchange event for digital content industries, conducted under the “*Vive Digital*” plan.
- **Apps.co** (Colombia):¹³¹ also implemented under the “*Vive Digital*” plan, this initiative seeks to strengthen local capacities and generate business in the field of mobile applications, Internet platforms and digital content.
- **C3+D** (Colombia):¹³² laboratory of digital content enterprises, organized by the Ministry of Culture and the Centre of Science and Technology of Antioquia (CTA).
- **Assistance for cultural and creative industries** (Spain):¹³³ support programme implemented by the MECD, aimed at increasing the legitimate supply of digital cultural content on the Internet and promoting the modernization and innovation of cultural and creative industries.
- **FICOD** (Spain):¹³⁴ the international forum on digital content, organized through Red.es by the Ministry of Industry, Energy and Tourism, is one of the instruments of the Digital Agenda for Spain.
- **Emprendelibro** (Spain):¹³⁵ assistance programme for digital publishing ventures, carried out by the Germán Sánchez Ruipérez Foundation and *Factoría Cultural*, with the support of the MECD.
- **Appuesta Digital** (Mexico):¹³⁶ assistance offered by the Digital Culture Centre for the development of Internet or mobile phone applications that help to improve the productivity and sustainability of cultural enterprises.

¹²⁷ See Manrique Sabogal (2015).

¹²⁸ In this list, we have only included those policies and measures that specifically focus on the digital environment. However, there are many initiatives that target the industry in general and incorporate some categories dedicated to new technologies, as in the case of the Argentine Cultural Industries Market (MICA), and its international equivalent, the Cultural Industries Market of the South (MICSUR).

¹²⁹ <http://www.tda.gob.ar/tda/141/11162/polos.html>

¹³⁰ <http://col30.co>

¹³¹ <https://apps.co>

¹³² <http://laboratorioc3masd.co>

¹³³ http://www.mecd.gob.es/cultura-mecd/areas-cultura/industriasculturales/ayudas/ayudas_inversio.html

¹³⁴ <https://ficod.es>

¹³⁵ <http://emprendelibro.com/>

¹³⁶ <http://semana-emprendedor.centroculturaldigital.mx/appuesta.html>

Case Study 4: Assistance for cultural and creative industries (Spain)

The Secretariat of State for Culture of Spain's Ministry of Education, Culture and Sport offers economic assistance for the modernization and innovation of the cultural and creative industries through digital and technological projects. These projects must increase the legal supply of digital cultural content on the Internet. A fundamental aspect of this aid is that it not only aims to strengthen the industries' ecosystem – in sectors like the performing arts, visual arts, cinema, television, radio, advertising, videogames and interactive arts, design, music, books and architecture – but also has a positive effect on access, since it promotes a higher quality of cultural offerings available online.

In the specific case of micro-patronage, it is worth mentioning that in 2015, Spain announced a tax reform that regulates this instrument and offers tax deductions on financial contributions to cultural productions.¹³⁷

Moreover, there are several app projects and online platforms up and running, usually created by public institutions, which aim to streamline and strengthen certain cultural industries. For example, in 2015, Mexico's Secretariat of Culture launched "**Libros México**",¹³⁸ a multifunctional virtual space that offers technological tools for local book publishers, importers, distributors, librarians, booksellers and readers. Another interesting initiative is **libreriasdeviejomexico.org**, a portal developed by Mexico's Metropolitan Autonomous University (UAM) which provides an interactive map with the location of dozens of Mexican old book shops – a market that is considered to be threatened with extinction.

The application **Ibermúsicas**,¹³⁹ developed in early 2016 by the homonymous Ibero-american programme, ultimately aims to promote the presence and knowledge of musical diversity, encourage the formation of new audiences in the region and expand the labour market for professionals in the sector, with the support of 10 countries – Argentina, Brazil, Colombia, Costa Rica, Chile, Cuba, Mexico, Paraguay, Peru and Uruguay.

It is perhaps in the film segment that most platforms have emerged from public-sector initiatives. In 2015, Argentina's National Institute of Cinema and Audiovisual Arts (INCAA) launched **Odeón**,¹⁴⁰ a VOD portal offering national films, series, documentaries and shorts. In late 2014, Ecuador's National Telecommunications Corporation launched the system **CNT Play**,¹⁴¹ which provides content on demand, with special emphasis on local productions. Meanwhile, Spain's MECD operates the service **Ver películas online**,¹⁴² a search engine that allows viewers to follow the complete legitimate online offer of films. The Mexican Film Institute (IMCINE) – with support from the Secretariat of Culture and in partnership with the Spanish company Filmin – is responsible for the VOD portal **Filmin Latino**,¹⁴³ which offers fiction films, documentaries, animation, shorts and series made by both local and international filmmakers. IMCINE also manages the digital platform **Cinema México**, which delivers more than 200 films produced by the Institute.

There are also film platforms emerging from international cooperation. The **Retina Latina**¹⁴⁴ portal, supported by six Latin American film institutes – from Bolivia, Colombia, Ecuador, Peru, Mexico and Uruguay – and backed by the Inter-American Development Bank (IDB) and the Conference of Ibero-American Cinematographic Authorities (CACI), proposes a variety of online movies in order to bring local film output to new audiences in the region. Moreover, under the impetus of CACI and the digital platform Cinema México, the **Pantalla CACI**¹⁴⁵ project has been established – an Ibero-American film portal consisting of three areas: *Ibermedia Digital* for films, *DOCTV Latinoamérica* for documentaries and *Aula* for lectures organized in the form of reports and interviews with directors, technicians and actors.

¹³⁷ See "El micromecenazgo" (2015).

¹³⁸ <https://librosmexico.mx/>

¹³⁹ <https://play.google.com/store/apps/details?id=com.theamalgama.ibermusicasapp>

¹⁴⁰ <https://www.odeon.com.ar>

¹⁴¹ <http://www.cntplay.com/>

¹⁴² <http://verpeliculasonline.mecd.gob.es/mc>

¹⁴³ <https://www.filminlatino.mx/>

¹⁴⁴ <http://retinalatina.org/>

¹⁴⁵ <http://pantallacaci.com/>

Case Study 5: Retina Latina

Backed by cinematographic organizations in six Latin American countries – Bolivia, Colombia, Ecuador, Peru, Mexico and Uruguay – and supported by the Inter-American Development Bank (IDB) and the Conference of Ibero-American Cinematographic Authorities (CACI), since March 2016 the Retina Latina portal has been offering movies online in order to introduce local film output to new audiences. In the long term, the project aims to strengthen the Latin American film market and facilitate the international distribution of its works. Experiences like Retina Latina are extremely important when it comes to consolidating the digital cultural market at the level of the region as a whole.

Lastly, also in the field of cooperation, it is worth noting the project entitled **Network of Digital Cinemas from MERCOSUR**.¹⁴⁶ The structure comes under the Southern Common Market (MERCOSUR) Audiovisual Programme, an initiative of the Specialized Meeting of MERCOSUR Film and Audiovisual Authorities (RECAM), in collaboration with the European Union. Its main objective is to strengthen the circulation of local audiovisual content, within the regional bloc. The network currently comprises 30 cinemas: 10 in Argentina, 10 in Brazil, 5 in Paraguay and 5 in Uruguay (in a second stage cinemas will also be added in Venezuela, along with new projection venues in the aforementioned countries).¹⁴⁷

4. Civil society

Digital tools can be clear allies in promoting the participation of civil society and raising awareness about the diversity of cultural expressions. It is evident that Internet has a unique ability to deliver information instantly and economically to a huge number of users, making a clear case for building cultural dissemination portals. Here are some examples of such platforms that have public-sector support:

- **España es cultura:**¹⁴⁸ portal developed by Spain's MECD, for the dissemination and promotion of local cultures. Among other materials, it has a listing with the highlights of the current culture offering.
- **Hipermédula:**¹⁴⁹ digital platform for cultural dissemination that encourages the linking of different actors, creators and audiences of the Ibero-American culture; it is an independent project that has the support of the Spanish Agency for International Development Cooperation (AECID) and the *Centro Cultural de España/Córdoba* (Argentina).
- **Americanosfera:**¹⁵⁰ a digital collaboration platform, created by Casa de América (Spain), which invites cultural centres and think-tanks in Ibero-america to showcase their activities, work and projects.
- **México es cultura:**¹⁵¹ website that operates as the national billboard of Mexico's Secretariat of Culture. Visitors can find a list of the most important activities in the field of music, film, dance, exhibitions and even in the "digital culture" category. The portal is also very active on social networks and has a mobile application that has been hailed as one of the best in the world.¹⁵²

¹⁴⁶ <http://www.recam.org/pma/categorias/red-de-salas/contenidos/red-de-salas>

¹⁴⁷ The list of cinemas as well as the film catalogue and schedule in each country can be found at the site <http://mercosuraudiovisual.org/>

¹⁴⁸ <http://www.españaescultura.es>

¹⁴⁹ <http://hipermedula.org/>

¹⁵⁰ <http://americanosfera.org>

¹⁵¹ <http://www.mexicoescultura.com/>

¹⁵² See "Multiplataforma de Conaculta" (2015).

- **WikiMexico:**¹⁵³ website for interaction and dissemination of Mexican culture, both historical and contemporary.
- **Alas y raíces:**¹⁵⁴ portal of Mexico's Secretariat of Culture, which aims to awaken the artistic sensibility in children and adolescents. It offers a line-up of cultural information and a section of mobile applications specifically designed for young audiences.

However, the power of the digital is expressed not only through information platforms, but also – and in particular – through the interactivity of social networks. In this field, Latin America and Spain have the world's highest user rates,¹⁵⁵ which provides an extraordinary opportunity for awareness-raising and outreach initiatives at the regional level. Indeed, global networks and portals such as Facebook, Twitter, YouTube and even indigenous websites like Taringa!¹⁵⁶ have become very powerful channels for cultural exchange. One example is the BookTubers phenomenon: these are users – generally teenagers or young adults – who comment on books through YouTube and have thousands of followers.¹⁵⁷ In addition, book recommendation portals in the region – such as Entrelecturas¹⁵⁸ and Lecturalia¹⁵⁹ – enable readers to share information.

The potential of new forms of communication is being used by public institutions in different ways. Numerous festivals, museums and art centres use social networks to disseminate information and interact with their public directly.¹⁶⁰ Furthermore, the region's ministries of culture have a considerable number of followers. It is worth noting the enormous impact on social networks of Mexico's Secretariat of Culture, whose Twitter account,¹⁶¹ for example, has nearly 1.5 million followers.¹⁶²

On the other hand, if the key to digital communication is interaction, it should be noted that the same logic is influencing the way that policies are developed. For example, to reach the final version of its Digital Culture Policy document, Colombia's Ministry of Culture submitted the first draft to a discussion in which there were more than 300 participants, including experts, communicators, institutions and members of civil society.¹⁶³ This process was crucial to validate the proposed lines of action and to gather new ideas.

Countries have also contributed to the implementation of congresses and research spaces relating to digital culture in a broad sense. In 2013, the fifth Ibero-American Culture Congress¹⁶⁴ – entitled: "Digital Culture, Networked Culture" and organised by the SEGIB, the MECD and other entities – took place in Zaragoza. In 2015, the international conference on "Digital Culture, Communication and Society" was also held in Zaragoza, with the support of MECD.¹⁶⁵ The Audiovisual Diversity project¹⁶⁶ – based at the Carlos III University in Madrid – has since 2012 been carrying out a wide range of research and exchange activities related to diversity in the cultural industries in general, and the digital audiovisual sector in particular, with support from the Ministry of Economy and Competitiveness. Meanwhile, in 2015 Argentina organized the Digital Culture Forum – a space for reflection, bringing together cultural producers, academics, digital entrepreneurs, legislators and artists, in order to reflect on the challenges and needs of the current era.¹⁶⁷

¹⁵³ <http://wikimexico.com/>

¹⁵⁴ <http://www.alasyraices.gob.mx/>

¹⁵⁵ Latin America is home to more than 217 million users of Facebook (see eMarketer, 2015a and 2015b); Twitter, on the other hand, has recorded a growth rate in the region that is among the highest in the world. For data concerning Spain, see VIU (2015).

¹⁵⁶ <http://www.taringa.net/>

¹⁵⁷ See Perazo (2014).

¹⁵⁸ <http://www.entrelectores.com/>

¹⁵⁹ <http://www.lecturalia.com/>

¹⁶⁰ For a good overview of the use of new technologies in the field of museums and festivals in Spain, see Cano Coca, Vázquez Aldecoa and Celaya (2015) and Roselló and Celaya (2016), respectively.

¹⁶¹ https://twitter.com/cultura_mx

¹⁶² May 2016. For a detailed list of the networks of the Secretariat, see "Las redes sociales" (2015).

¹⁶³ See "Política Cultura Digital" (undated).

¹⁶⁴ <http://www.culturaiberoamerica.org/en/>

¹⁶⁵ <http://www.congresoculturadigital.es>

¹⁶⁶ <http://diversidadaudiovisual.org/>

¹⁶⁷ <http://digital.cultura.gob.ar/>

Case Study 6: Digital Culture Forum (Argentina)

In 2013, Argentina organized the first national forums geared toward a digital cultural agenda, which converged in October 2015 to create a larger-scale event: the Digital Culture Forum. This space brought together cultural producers, academics, digital entrepreneurs, activists, programmers, artists and users with the aim of reflecting on the opportunities and challenges facing Argentine cultural industries in the digital age. Activities of this kind can prove highly useful in terms of promoting increased involvement by civil society in raising awareness about current problems as well as developing new policies for culture.

Finally, it is worth noting the various editions of books relating to this subject that have been promoted by public-sector entities. For example, the work *“En la ruta digital”*, compiled in 2012 by Argentina’s National Directorate of Creative Industries¹⁶⁸ and the *“Anuario AC/E”*, published by Spain’s Public Agency for Cultural Action (*Acción Cultural Española – AC/E*), which examines the evolution of digital trends in the world of culture.¹⁶⁹

Monitoring digital issues for the future

How do we measure the progress made by countries in terms of the protection and promotion of the diversity of cultural expressions in the digital age? The monitoring framework presented in the UNESCO Global Report *Re/Shaping Cultural Policies* proposes 3 main indicators in this area, with their respective means of verification:¹⁷⁰

- 1) Legislative base for **universal access** to the internet is a) established b) evaluated and c) functioning. Means of verification:
 - 1.1. Evidence of relevant laws to establish universal access to the internet
 - 1.2. Evidence of universal access to mobile internet connections (by gender, age, income level) and to social networks
 - 1.3. Evaluation reports on the impact of laws on universal access to the internet
- 2) Policies and measures to encourage digital **creativity** and **civil society participation** in the digital environment are a) established, b) evaluated and c) functioning. Means of verification:
 - 2.1 Policies and measures to support digital arts, incubators for electronic art and experimentation, training for artists
 - 2.2 Measures to promote the production and consumption of e-content (paid and free, international and local)
 - 2.3 Measures to encourage civil society participation via digital media
 - 2.4 Evaluation reports on the impact of policies to encourage digital creativity and civil society participation in the digital environment
- 3) Policies and measures to support dynamic and diverse digital **cultural industry markets** are a) established, b) evaluated and c) functioning. Means of verification:
 - 3.1 Policies and measures to support the modernization of the cultural industries (e.g. technological infrastructure and training for digital cinema/filmmaking, e-publishing/writing)
 - 3.2 Number of e-players participating in the market, by cultural industry (e.g. music, publishing, film, etc.) and levels of digital literacy among consumers (by gender, age, income level)
 - 3.3 Share of digital income for small and medium-sized companies, by cultural industry
 - 3.4 Evaluation reports on the impact of policies to support dynamic and diverse digital cultural industry markets

¹⁶⁸ <http://digital.cultura.gob.ar/en-la-ruta-digital/>

¹⁶⁹ <http://www.accioncultural.es/en/ac e digital culture annual report>

¹⁷⁰ See Kulesz (2015: 86).

As can be observed, the indicators presented above reflect the 4 core themes that we have chosen to structure this report. On the other hand, it must be recognized that in some cases – particularly for indicators 2 and 3 – it is not easy to find the corresponding data. Now, since the health of the cultural ecosystem largely depends on the amount and quality of information available to the stakeholders – public sector, private enterprise, civil society – all efforts geared toward bridging these gaps could prove highly beneficial.

Conclusions

As we have tried to show in this study, digital technologies are having a significant impact on the cultural scene of Spain and Hispanic America, and the landscape of opportunities, barriers and policies associated with the protection and promotion of the diversity of cultural expressions in the digital era is highly complex. Now, following examination, new technologies cannot be said to be either positive or negative in themselves but instead can be regarded as both an advantage and a challenge, depending on how they are applied in each context: indeed, according to the way they are used, digital tools can, for example, generate a rich and dynamic market of cultural industries, or concentrate the supply in the hands of very few players. Public policies have a decisive influence in defining the outcome in either direction.

Within this framework, when it comes to protecting and promoting the diversity of cultural expressions in the new environment, the progress made by some countries could be extremely useful for others. Indeed, many of the initiatives we have studied in relation to access, creativity, cultural industries and social engagement are clear success stories that could be replicated.

However, beyond the actions that have been described, there are some less explored areas, which would be worth examining. We are mainly referring to opportunities that are not being fully utilized, or challenges that are not being adequately addressed. Below, we shall develop some of these issues, which could also be useful when preparing a list of recommendations and best practices.¹⁷¹

With regard to access, the public sector has made considerable efforts to reduce the digital divide. Nevertheless, these projects are often part of vast national infrastructure plans, the drafting and implementation of which usually involve the ministries of technology, industry, communications and education, among others, but not the ministry of culture – and this fact can have a negative impact in terms of the diversity of cultural expressions. Furthermore, in a context in which large international platforms are increasing pressure to provide infrastructure solutions, it is essential to insist that without public policies in this area, equitable access and net neutrality may be at risk.

From the viewpoint of creativity, countries have invested in platforms and applications that contribute to the visibility of local artists, training activities that help them to experiment and create with digital technologies and various measures to protect copyright. Nevertheless, cultural policies often remain too anchored in the analogue creation model – in which the message is communicated in one direction – and lose sight somewhat of the very paradigm of the new environment, which is characterized by interaction and collaboration.

Regarding cultural industries, support for professional networking, training and modernization, as well as the establishment of platforms that contribute to the consolidation of the book, music and film industries, are key initiatives. However, the challenges associated with large global platforms and their impact on the local creative chain are not receiving comprehensive treatment: without a firm strategy in this area, the problems can be exacerbated, both at the industry level and in terms of national statistics.

¹⁷¹

In Annex 1 readers will find a list of 50 recommendations, organized around seven subject areas – 4 corresponding to the core themes previously described and another three linked to cross-cutting themes – which emerge from this analysis.

Finally, countries have carried out numerous projects for cultural dissemination and promotion of social engagement, particularly through outreach platforms, communication through social networks, public consultations, conferences and publications on culture in the digital era. Here there is a somewhat missed opportunity: the chance to raise awareness among the general public about the objectives and principles of the 2005 Convention and maintain a more explicit discussion on the impact of digital technologies on the diversity of cultural expressions.

At any rate, it is clear that for the culture of Spanish-speaking countries the digital age does not represent a possible future but rather a current reality. Although a great deal remains to be done to achieve a deep understanding of these processes in both quantitative and qualitative terms, we could postulate, in line with the Declaration of Veracruz, that the digital cultural space composed of Spain and Hispanic America is not something that has to be built from scratch but instead already exists and is developing in a highly dynamic manner. It is also apparent that there are marked contrasts between countries, with regard to numerous technological, economic and social particularities, and these features might intensify over time.

In future research on the relationship between digital and the diversity of cultural expressions in the Spanish-speaking countries, it will certainly be necessary to maintain a dual approach. On the one hand, we must continue to pay attention to the universal/common aspect involving a wide range of opportunities, challenges and policies that are repeated throughout the region. Secondly – to the extent that the available data permit – it will be essential to examine the local/specific component, defined by the particular situation and priorities of each country. In a sense, this is the same duality we find in the idea of a shared language: the region has Spanish in common, but there are undeniable differences in dialect that must be taken into account. And, ultimately, if the aim is to consolidate the Spanish-speaking digital space in such a way as to promote and protect the diversity of cultural expressions, it will be vital to strengthen both pillars simultaneously: the regional exchange networks – of data, experiences, content and artistic expressions – and the constant work on specific local needs.

ANNEX 1: LIST OF RECOMMENDATIONS

Access

- (1) Involve the Ministry of Culture in the drafting and implementation of major national plans on technological infrastructure and digital inclusion, as they often cover areas that are directly or indirectly linked to the diversity of cultural expressions.
- (2) Include cultural clauses and references to the 2005 Convention in those national digital plans and agendas.
- (3) Simplify online access to cultural expressions housed in public institutions such as museums, libraries and archives, either through the digitization of materials or the consolidation of catalogues available on the Internet.
- (4) Step up efforts to ensure the accessibility, universality and neutrality of the Internet.

Creativity

- (5) Multiply training opportunities for artists working with digital tools.
- (6) Give greater visibility to creators who experiment with new technologies.
- (7) Provide more incentives for digital creation.
- (8) Offer support to professional centres, festivals and events that promote electronic art.
- (9) Modernize processes of registration and legal deposit of art works, particularly those created with digital media.
- (10) Promote equitable remuneration of artists within the framework of the new creative chain.
- (11) Protect digital creation, for example, through the development of a guide of good practices for compliance with copyright.
- (12) Support new forms of micro-patronage or crowdfunding that help sustain the activity of artists.

Cultural industries

- (13) Accompany the book, music and film industries in their digitization and modernization efforts.
- (14) Provide more training opportunities for cultural industries that need to hone their digital skills.
- (15) Help to strengthen the digital cultural market at the national level.
- (16) Adapt mechanisms for electronic transactions in order to facilitate online trade in goods and services.
- (17) Take measures to prevent the concentration of supply and to promote the coexistence of multiple commercial players, both national and international.
- (18) As in the field of creativity, support crowdfunding, in this case for the online production and distribution of cultural goods and services that have a slower commercial outlet.

- (19) Contribute to closer linking between culture professionals and the digital world, such as programmers, web designers, and videogame developers, among others.
- (20) Encourage digital co-production and co-distribution within the region.
- (21) Foster meetings of entrepreneurs working in digital content.
- (22) Step up efforts to create a legal supply of online goods and services.
- (23) Rethink public procurement of cultural goods and services based on the new forms of creation, production and distribution.
- (24) Contribute to greater interoperability and standardization of formats and metadata.
- (25) Achieve greater transparency in the way in which online supply is presented, particularly on large platforms, to ensure adequate visibility of local cultural goods and services.
- (26) Evaluate the need for changes in legislation linked to the distribution of online cultural goods and services, as in the case of fixed price for e-books.
- (27) Pay attention to the cultural circuits that may be threatened by technological changes, as in the case of physical bookshops.

Participation of civil society and awareness-raising

- (28) Harness the potential of social networks and other digital tools, as a means to encourage social engagement and raise awareness about the diversity of cultural expressions in the new environment.
- (29) Take advantage of regional exchange forums such as the Cultural Industries Market of the South (MICSUR), to advance discussion about these issues.
- (30) Make public policies more interactive and open new spaces to involve civil society in the development of national plans.

Cooperation

- (31) Introduce cultural clauses and references in the 2005 Convention on digital plans and agendas for international cooperation.
- (32) Also introduce cultural clauses and references in the 2005 Convention on free trade agreements – whether bilateral or multilateral – paying particular attention to the status of e-commerce in cultural goods and services.
- (33) Update cultural cooperation – such as the Ibero-American Cultural Charter – so as to include reflection on the opportunities and challenges of digital technologies. This work can follow closely the discussions within UNESCO regarding the operational guidelines on the implementation of the 2005 Convention in the digital environment.
- (34) Establish close coordination between regional agencies and the bodies of the 2005 Convention, to coordinate efforts and unify strategies for the protection and promotion of cultural expressions in the digital environment.
- (35) Contribute with the International Fund on Cultural Diversity for the implementation of projects relating to the incorporation of new technologies in local culture.
- (36) Foster greater exchange between ministries of culture from the region, on issues relating to new technologies.

Exchange of information and data collection

- (37) Conduct further studies on the impact of the digital era on the diversity of cultural expressions, particularly in other Spanish-speaking countries.
- (38) In addition to books, music and film, incorporate within the research the problems specific to other industries, such as videogames and animation.
- (39) Conduct new mappings of digital culture, in line with that developed by the SEGIB around citizen innovation – while focusing specifically on the issue of the diversity of cultural expressions.
- (40) Include the digital variable in the satellite accounts and observatories of culture in order to measure more accurately the consumption and production of digital content broken down by industry, origin (local/international), media, format and so forth.
- (41) Exchange experiences with countries in other language areas, in order to share best practices and lessons learned.
- (42) Study the effect of the integration of digital markets on the diversity of cultural expressions, both in terms of opportunities and challenges, for example in the EU Digital Single Market.
- (43) Provide information on opportunities, challenges and policies implemented in the digital environment, upon submission of the quadrennial periodic reports for the 2005 Convention.

Strategic issues

- (44) Understanding digital as another dimension of human culture, which is constructed “by everyone together” – rather than “from the top down” – and which not only solves technical problems but also expresses values, meaning and identity.
- (45) When defining digital culture programmes, adopt a comprehensive approach, which does not exclude any of the 4 areas described above – access, creativity, cultural industries and civil society.
- (46) In each of the four areas, always place people, not the tool – whether a device, a platform or an application – at the centre.
- (47) In designing national digital platforms, consider synergies with existing local platforms, rather than starting from scratch, so as to collaborate with industry and ensure the sustainability of the initiative.
- (48) Establish a synchronization of national projects relating to digital culture with plans made at the provincial and municipal level.
- (49) Launch new public-private partnerships.
- (50) Foster inter-ministerial synergies, particularly between the Ministry of Culture and the Ministry of Technology.

ANNEX 2: MAIN EXPERTS CONSULTED

- Adsuara, Borja: lawyer, university lecturer and expert consultant on law and digital strategy (Spain)
- Albornoz, Luis: researcher, university lecturer and expert on audiovisual communication (Argentina and Spain)
- Amatriain, Ignacio: sociologist, university lecturer and expert on cultural industries (Argentina)
- Arrieta, Pablo: university lecturer and expert on new media (Colombia)
- Astudillo Borja, Lisset: director of International Relations and Cultural Cooperation at the Ministry of Culture and Heritage (Ecuador)
- Bello, Mónica: researcher and art critic specializing in emerging cultural practices (Spain)
- Bercovich, Fernando: researcher, head of the digital department of the Ministry of Culture's Cultural Information System (SIncA) (Argentina)
- Boland, Philippe: president of Internauta – Colombian Internet users' association – and expert on new media (Colombia)
- Buitrago, Felipe: consultant and expert on creative economy (Colombia)
- Bultynch, Daniela: Secretariat of Public Media – Federal System of Public Media and Content (Argentina)
- Cárdenas Castillo, Jonathan: Department of Regulation and Control at the Ministry of Culture and Heritage's Sub-secretariat of Cultural Enterprises and Industries (Ecuador)
- Carrasco, Diego: technician in the field of popular and solidarity-based economics and coordinator of the Textures and Colours Fair organized by the economic promotion agency ConQuito (Ecuador)
- Castellanos, Alfonso: anthropologist, consultant on creative economy-related topics and expert on cultural indicators (Mexico)
- Castillo, Carlos: writer and literary agent (Colombia)
- Colagiovanni, Vanina: writer and co-coordinator of the Editorial Department of the Ministry of Culture's Argentine Cultural Industries Market (Argentina)
- Correa, Iván: director of the digital publishing house eLibros (Colombia)
- D'Elia, Alejandrina: director of Cultural Innovation at the Ministry of Culture's Sub-secretariat of Creative Economy (Argentina)
- De la Peña Aznar, José: consultant specializing in digital technologies and telecommunications (Spain)
- Del Corral, Milagros: expert on book policy, libraries, copyright and new publishing technologies (Spain)
- Di Paola, Virginia: head of the strategic alliance department at the British Council (Argentina)

- Escobar Guevara, Raúl: rector of the National Conservatory of Music (Ecuador)
- Fernández Orgaz, Laura: director of Collections and Exhibitions at the Telefónica Foundation (Spain)
- Flores Cevallos, José Daniel: Department of Regulation and Control at the Ministry of Culture and Heritage's Sub-secretariat of Cultural Enterprises and Industries (Ecuador)
- Franco, Germán: assistant director of the Ático Centre at the Pontifical Xavierian University and expert on communication policy and digital culture (Colombia)
- Gaitán, Juan Carlos: director of Prana – incubator for cultural enterprises and creative industries (Colombia)
- García Leiva, Trinidad: researcher, university lecturer and expert on the development of the digital audiovisual sector (Spain)
- García, Marcos: director of MediaLab Prado (Spain)
- González, Luis: director general of the Germán Sánchez Ruipérez Foundation (Spain)
- Gribnicow, Andrés: under secretary for Creative Economy at the Ministry of Culture (Argentina)
- Holguín, Catalina: editorial director of the digital enterprise Manuvo (Colombia)
- Holtz, Deborah: publisher, director of the publishing house Trilce and president of the Alliance of Independent Mexican Publishers (AEMI) (Mexico)
- Jaramillo, Alejandra: writer, university lecturer and director of the Masters in creative writing at the National University (Colombia)
- Jaramillo, Bernardo: assistant director of Reading, Writing and Libraries at CERLALC (Colombia)
- Klinkovich, Vanina: illustrator (Argentina)
- Kohan, Lucas: musician (Argentina)
- Londoño, Felipe César: rector of the University of Caldas and Director of the International Festival of the Image (Colombia)
- Manjarres, Daniel: director of the Bogotá Museum and advisor to the Ministry of Foreign Affairs' Cultural Affairs Department (Colombia)
- Monak Salinas, Lenin: assistant director of the Research and Statistics Unit at CERLALC (Colombia)
- Monteros, Ricardo: composer and director of the symphonic orchestra of the National Conservatory of Music (Ecuador)
- Moreno, Ángel: assistant director of Cultural Practices at the Secretariat for Culture, Recreation and Sport of the City of Bogotá (Colombia)
- Navarro, Blanca: expert on communication and director of the cultural promotion agency Disueño (Spain)

- Noejovich, Sebastián: general coordinator for Arts and Literature at the Ministry of Culture (Argentina)
- Nongo, Néstor: technical advisor to the Ministry of Education, Culture and Sport's Secretariat of State for Culture (Spain)
- Orosa, Iván: under secretary for Cultural Enterprises at the Ministry of Culture and Heritage (Ecuador)
- Pascual, Javier: Office for the Promotion of Books, Reading and Spanish Literature of the Ministry of Education, Culture and Sport (Spain)
- Pedrosa, Fernando: Secretariat of Public Media – Federal System of Public Media and Content (Argentina)
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