Book

Cinema and Soft Power: Configuring the National and Transnational in GeoPolitics

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The global animation market: opportunities for developing countries

Alessandra Meleiro

Research carried out in 2010 by The Brazilian Trade and Investment Promotion *Agency* (Apex-Brazil), in partnership with GFK Roper Public Affairs in 20 countries and with over 20 thousand interviews, gathered information on the perception of the image of Brazil compared with that of other countries. The methodology was based on six dimensions for the construction of country image: *Exportation, Governance, Culture, People, Tourism, Investment and Immigration* (GFK, 2010).

The report concluded that Brazil is in 20th place on a list of 50 countries on the *Nation Brand Index* – NBI, with the *culture* dimension having the most relevance (in 10th place). The most commonly associated words with the perception of Brazil's image were *Corruption, Carnival, Sport, Receptivity, Vibrant, Fascinating, and Development*.

Brazil's performance in the Anholt-GFK Roper Nation Brands IndexSM[i] between 2004-2010 has also been truly interesting – it was one of the few countries to show continuous, gradual improvement in its global scores year on year, and still the only developing country to break into the Top 20 overall most admired nations in the Nation Brands Index (IPSOS, 2019).

In comparison with the year 2000, the above result suggests positive evolution of the perception of Brazil's image. In the year 2000 results, the Ministry of Development, Industry and Foreign Trade commissioned a similar study from the McCann Erickson agency[ii] which, at the time, concluded that Brazil was directly associated with five words: *Sun, Sand, Song, Sexiness,* and *Soccer* (5 "S").

Brazil has appeal for 'soft factors' such as tourism, cuisine, culture and people, but it struggles to position itself as responsible player in international affairs, a desirable destination for foreign direct investment or as a significant economic actor (IPSOS, 2019). This is an enormous task.

Clearly, Brazil's rise to international prominence is both understood and shared by international public opinion. But simply being attractive is no longer enough for Brazil: the country has been failing to create the international consumer brands which would help to bring greater respect and prominence for Brazil around the world – brands which the country and its entrepreneurs are evidently and eminently capable of creating for the domestic market – and relatively little has been done to earn a firm reputation for things other than attractive people, landscapes and popular culture (Anholt, 2005, p. 30).

There is acute awareness in Brazil, both at the State level and within the culture industry itself, of the extent to which the nation has been a victim of negative stereotyping, a feature arguably shared with other BRICS nations. Thus, when discussing soft power, cultural diplomacy and branding, we would do well to remember that the issues and tensions facing emerging nations in relation to their image abroad and the motivating factors for wanting to promote, challenge, or increase the presence of that image abroad, will not be the same as the issues facing, say, the UK or Spain. Hence, reputation management is a substantial part of the soft power story in Brazil where it might not be in the UK, for example (Dennison 2017: 20).

The Brazilian creative industry in a time of crisis

Remnants of a positive reputation have been undermined in recent years by the immense administrative ineptitude, especially on an economic level, together with massive corruption that has characterized nearly a decade and a half of Lula/PT workers party governments (Almeida 2019: 81). And they definitively reached their lowest level after the October 2018 election results, when Jair Bolsonaro won the presidential election, as well defined by the Editorial of a major Brazilian newspaper:

> The gloomy set of ideas that until now seemed to herald a setback in Brazilian foreign policy began to materialize in the administration of President Jair Bolsonaro. Unless there is profound reflection from the government about its terrible effects, the apparent "twist" led by Chancellor Ernesto Araújo - which might well be called a "crusade" - has the potential to end what still remains of Brazil's good reputation in the civilized world (...). (Editorial, 10/01/2019. O Estado de S. Paulo).

Since then, the world has been receiving rather confusing signals about the effective direction taken by Brazilian foreign policy, initiated during the campaign and in the immediate follow up of the elections. What was expected at the beginning of the government was that there would be a clear statement regarding the main guidelines to be followed by Brazilian diplomacy at the time of the inauguration of the president

and his chancellor (Almeida 2019: 81). Due to the characteristics of the two of them, this simply did not happen: neither in terms of general government policies, nor in terms of foreign policy or cultural policies.

The culture sphere, specifically that of cinema - concerning foreign policy as a potential soft-power asset - has never explicitly figured on the agenda of the Brazilian right, which understands it as a commercially unpopular and expensive art form that relies heavily on State funding for it survival, and that has close association with left-wing politics (Dennison, 2017: 28). Jair Bolsonaro's government does not readily recognize cinema as part of 'Brand Brazil', and has been working systematically in 2019 to transform the National Film Agency (Ancine, which regulates, oversees and fosters the sector) and the Audiovisual Sector Fund, which finances the sector in reflection of its political vision and economic premise. This includes the non-renewal of the screen quota for films produced nationally, the detachment of Ancine from the Ministry of Culture, and its transference to the Civil House (thus closer to the president and under his supervision), to name but a few examples.

In soft power terms, this appears to have brought us back to a set of damage limitation exercises, within the context of reputation management, rather than the presence of any ambitious programme involving the galvanising of soft power assets, such as the major awards won by Brazilian films in international festivals in 2019 ("Bacurau" by Kleber Mendonça Filho and Juliano Dornelles at the Cannes Film Festival, "The Invisible Life of Eurídice Gusmão", by Karim Aïnouz at the Cannes Film Festival, "Pacified" by Paxton Winters at the San Sebastian Festival, and "The Fever" by Maya da-Rin at Locarno Film Festival, among others), the main focus of Brazilian strategy in relation to increasing visibility abroad.

Soft power and the Misery of Diplomacy

Regarding the major items on the international agenda, in terms of regional commitments and of bilateral opportunities, the fact is that the current government has not yet offered a comprehensive, and systematic presentation of Brazil's international strategy, what the regional and multilateral priorities are, how it intends to organize economic openness and trade liberalization, what it will do with Mercosur, how it proposes to resolve the challenges of the country's global insertion in the great circuits of the world economy (Almeida, 2019: 19), or its relations with the BRICS – an important bet of the "Active and assertive foreign policy" of the diplomacy of the Lula-PT years.

Over the past ten months, the very few guidelines we have seen have been those such as the "foreign policy without ideology" and what appears to be a misguided view of

what the role of foreign trade in a notoriously closed country like Brazil means in the development process. As Paulo Roberto Almeida states in "Misery of Diplomacy":

> As the coefficient of Brazil's external openness is less than half of the world average, to aspire for the external partners to act in favour of more robust growth rates would be to have the commercial tail wagging the dog of development, without delving into the quality of these interactions (Almeida, 2019:90).

Thus, judging by the lack of tangible results to be presented by the current government and by the Ministry of Foreign Affairs, in all areas, including that of culture, in the first eleven months of the current federal management, and given the context of the decommissioning of previous policies, of condemnation, refusal and reversal of what had been done so far - added to the huge loss of Brazil's image and Soft Power due to the environmental policy[iii] (Mello, 2019) - , the analysis to follow regarding the animation industry in Brazil is limited to the reality lived up until December 2018.

The animation industry in Brazil in the context of Creative Economy

The creative industries are situated in what is called the Creative Economy. They are known for the use of creativity and talent as their main input and by the potential to generate income and work through the use of intellectual capital. They constitute a heterogeneous group of activities centred in knowledge (Meleiro, 2012, p. 50).

The double 'cultural' and 'economic' nature of the products of creative industries, that is, the fact that it is a sector of great economic importance and, at the same time, a tool where cultural expressions manifest themselves transnationally, demand analyses that can balance these two dimensions.

Culture is not only an energising factor of economic growth in the contemporary world (creating income generation and skilled employment opportunities in developed and developing economies), but it is also a great challenge for the different theoretical frameworks of the Economy. To move towards an 'information economy' or towards 'a creativity economy' means to abandon the old industrial world of tangible assets to turn to the production of intangible assets (Meleiro, 2012, p. 39).

While certain economic elements of this group have always been incorporated into the most traditional economic activities, only recently has the group been recognised as a distinct economic sector. Despite the global recession, world export of creative goods and services practically doubled between 2002 and 2015, according to the last survey of the United Nations Conference on Trade and Development (UNCTAC, 2016). The greatest exporters are still China and the United States, although emerging countries

such as Brazil, Turkey and India are increasingly expanding their export of creative services.

Data indicates that the majority of commercial transactions take place between a developed country and a developing country (North-South); however, there is room to undo this paradigm in exploring new partnerships between emerging economies (South-South), as is the case, for example, of audio visual co-productions and negotiations within Mercosul and between Brazil and China (MIN/UNESCO, 2018: 13-14).

Representing 25% of the audiovisual market, the total value of global animation industry total revenues was US $ 100 billion in 2006, US $ 222 billion in 2013, and US$ 259 billion in 2018, with projection to reach US$ 270 billion by 2020. Animation is one of the global creative industry sectors with the highest growth potential. Furthermore, in 2013, the digital animation industry handled about $ 500 billion in brand and character licensing, more than double that of 2006 ($ 200 billion) (Gama 2014: 95; Research and Market 2019).

With this panorama, we can state that the animation industry has become a sector of relevant economic dimensions for some countries and an important mechanism of economic growth for others: in The United States, animation has became the country's sixth largest industry; Canada is the world's largest animation producer, with four hundred hours a year; in Europe, a total of € 2 billion has been earmarked to finance five hundred animations on the continent via the European Union; in Japan, the entertainment industry is the third largest in the country; lastly, animation production in South Korea is so significant that it currently accounts for a third all animation production in the world (Gama 2014: 95).

The good overall performance of the digital animation market in recent years suggests an economic opportunity for companies not tied to US majors, including those from developing countries and the insertion of companies from developing countries into the global animation market permeates international division of labour and the new specialization of production between developed and developing countries.

The film and animation industry in Brazil

Even though certain aspects of the creative industry occupy an increasingly more central role in the global economic discussion, such as the regulations about intellectual property, the creative industries are still insufficiently studied in their economic aspects in developing countries. This is the case of Brazil.

The absence of information about the animation sector is so much more urgent when we think we have not solved the problem of sustainability of our pre-industry in

relation to the national space, local or regional, and we do not have consistent information systems.

In this respect, the market study and sector diagnostics of animation in 2018/2019 carried out by Anima Mundi/JLeiva, with the author of this chapter[1] as consultant, aimed at meeting the demand for information: if the animation sector has economic significance, consequently this significance must be measured (Mapping Animation in Brazil, 2019).

It is important to highlight that Anima Mundi is responsible for the International Anima Mundi Festival, the second largest animation festival in the world, only behind the Annecy festival, held in France for over fifty years.

The growth of Anima Mundi's initiatives was fostered by a series of partners, among which are Petrobras; 'BNDES'/Brazilian Development Bank; 'SEBRAE'/Brazilian Small Enterprise Assistance Service; 'Firjan'/Industry Federation of the State of Rio de Janeiro; Town Hall of Rio de Janeiro through RioFilme and the Municipal Department of Education; Town Hall of São Paulo through 'SPCINE'/São Paulo film and audiovisual company; several private businesses and investors. During its trajectory, partnerships were established with several Animation Schools and professionals of the whole world, who attended the Festival bringing Masterclasses and Workshops, and who received Anima Mundi activities in interchanges held with the aim to strengthen the co-production ties between the countries. Among the schools, the following may be cited: the French Les Gobelins, l'Ecole Supinfocom Valenciennes (Rubika), La Poudriére; and the American schools CalArts - California Institute of Arts and USC – University of Southern California; besides the Canadian school Vancouver Film School and the Danish Animation Workshop (Anima Mundi, 2016).

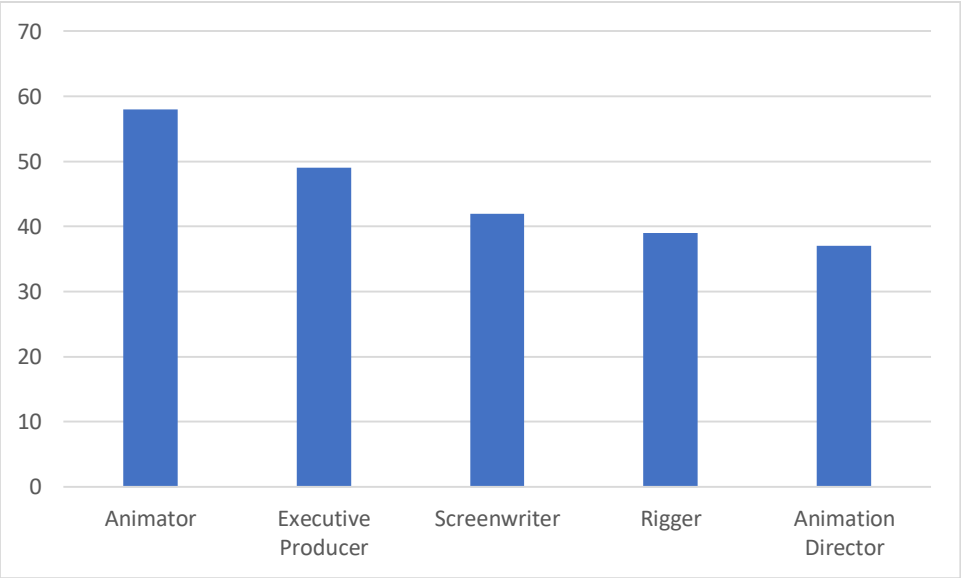
Several renowned international animation festivals also maintain a partnership relationship with Anima Mundi, among which are the International Festival of Annecy and Carrefour du Cinema d'Animation, in France; Ottawa Animation Festival in Canada; the Festival of Hiroshima in Japan; and Animateka, from Slovenia, besides several production companies and institutions that participated of the Anima Mundi Festival and maintain a partnership relationship as well as interchange and exchange of information[iii] (Anima Mundi, 2016).

In methodological terms, the Mapping of Animation in Brazil resorted to three tools: an online questionnaire with 45 questions sent to producers, freelancers and individual authors, as well as being distributed by partners and industry associations. This stage reached more than 1.700 producers, of which 455 responded to the survey (179 companies and 276 freelance professionals from 24 Brazilian states). The second tool, aimed at widening the understanding of the context of development of the sector and its bottlenecks, consisted of in-depth interviews with 18 representatives of the chain of

animation: public departments; sponsors/motivators; educational institutions; distributors; exhibitors; festivals; associations and software developers. The third tool, used to understand details of the activity under the perspective of the workers of the area, was a focus group held in April, in São Paulo, with ten people - such as producers, 2D animators, stop motion animators, screenwriters and sound editors.

Thus, it was learned who and how big the animation studios in Brazil are; the number of professionals acting in the formal market; professional profiles; identification of the main demands for workforce training/lack in productive specialisation; types of products involved, among other information, as can be verified below:

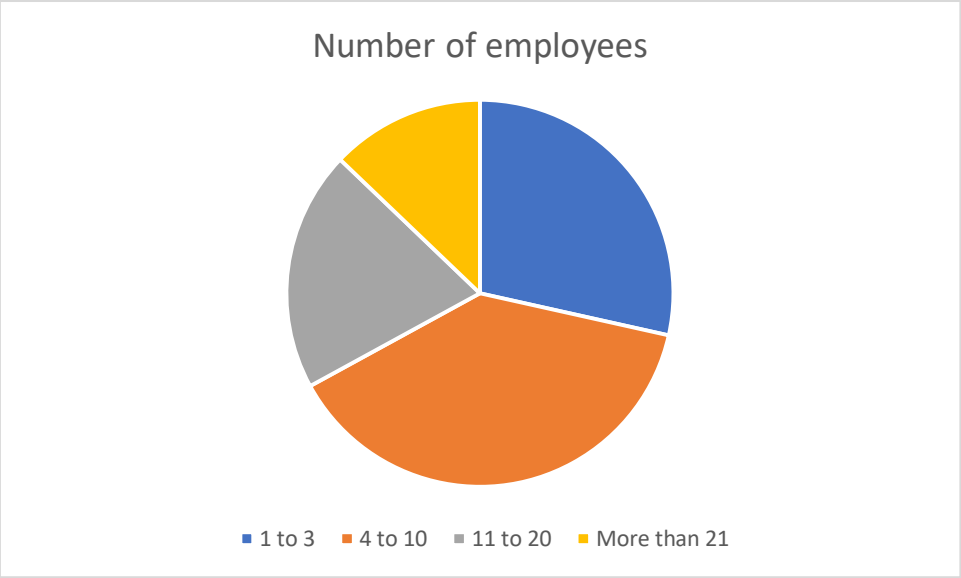
Chart 1 - Demanded occupation in the animation sector in Brazil



Source: Mapping of Animation in Brazil, 2019.

In the animation sector - as well as other industrial sectors that undergo accelerated growth – there is a significant lack of professionals with varied levels of training and specialisations, mainly considering that most professionals working in the country are self-taught. In Brazil, the few existing schools of animation are still very recent, the animation studios being the main training agents for professional specialists (Anima Mundi, 2016, p. 3).

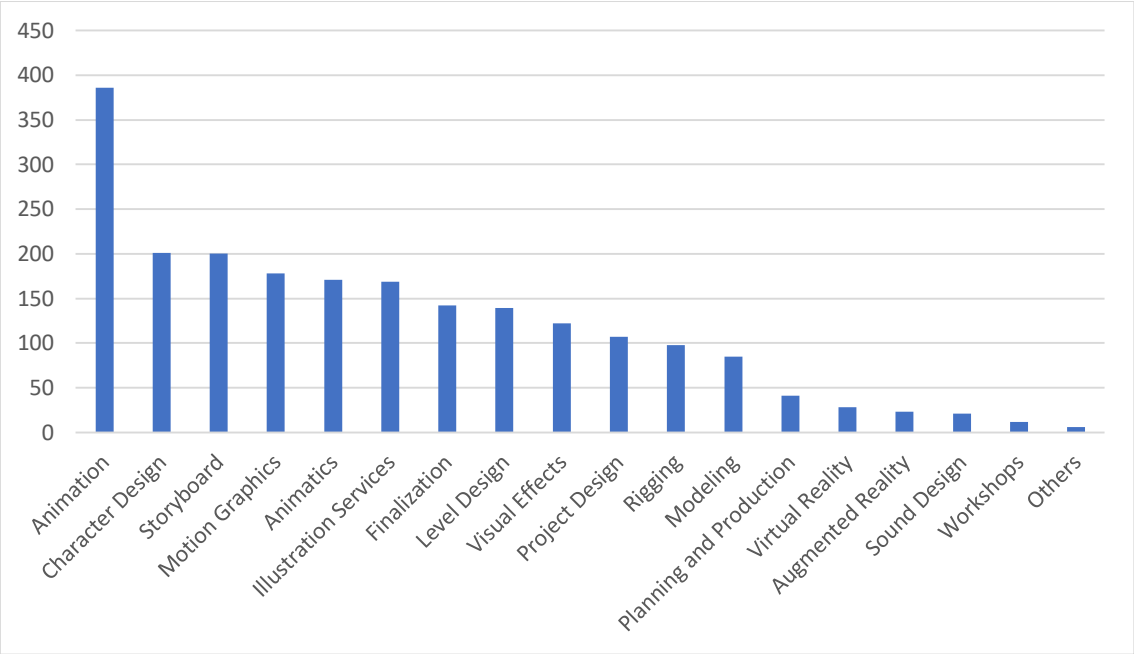
Chart 2 - Size of companies



Source: Mapping of Animation in Brazil, 2019.

The producers in the sample employ 2000 people, more than half are small-sized (54% have up to six employees).

Chart 3 - More common services/more frequent Jobs

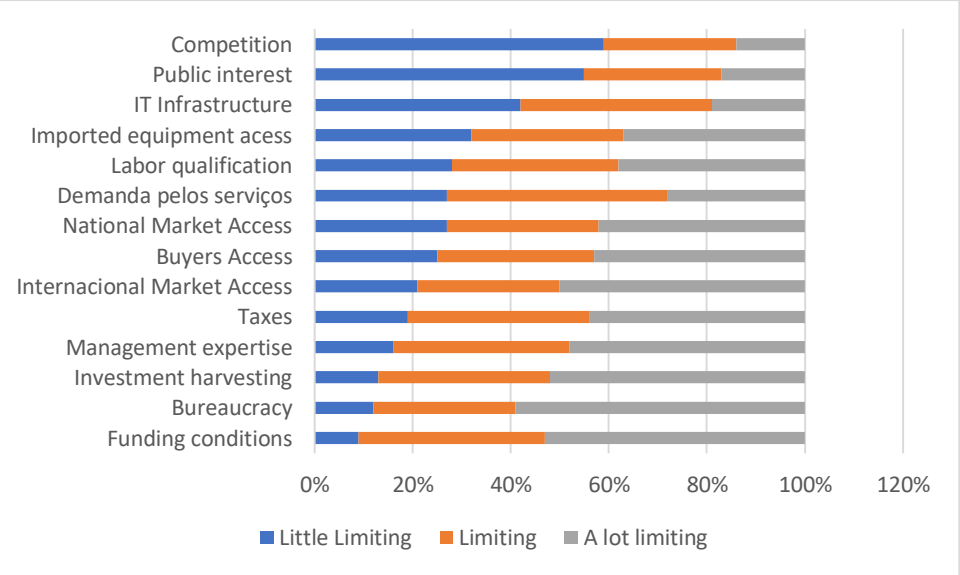


Source: Mapping of Animation in Brazil, 2019.

Despite animation being the top service provided by the mapped companies, only 44% of professionals working in the area have some training in animation, that is, many are trained by the market itself (Anima Mundi, 2016).

Professional training appears as the limiting factor (72% of companies stated it is limiting) for the development of the sector - be it in the technical area (animators), with higher qualifications (areas of management and script) - demanding qualification initiatives to guarantee the quality of products able to compete in the global Market.

Chart 4 - Factors limiting the animation market



Source: Mapping of Animation in Brazil, 2019.

Since it is a relatively new market in Brazil, the animation segment still depends on tax incentives and public notices). Thus, bureaucracy is seen as the most limiting factor in the industry, together with the difficulty in attracting investments.

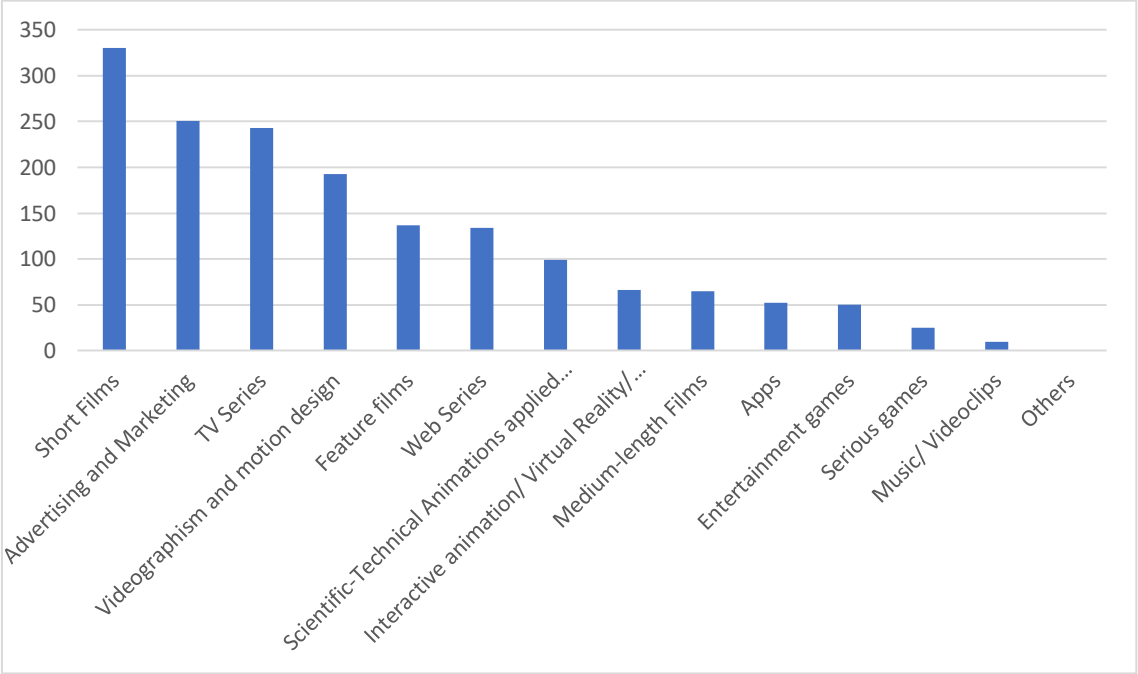
37% of the companies researched stated they had made use of the Audiovisual Sectorial Fund (public funding) to finance their productions, but only 20% effectively used the fund in their projects. From the lines of investment, the most sought after was the one destined for the television market, with 51%.

The high cost, low diversification of sources of finance and the long production deadline require from the producers and animation studios more planning and rigour in the development of business plans - 51% of Brazilian animation producers do not use business plans and of those who use plans, only 43% Project for the next 10 years (Farah, 2015), emphasizing the lack of knowledge in the area of management.

Type of works produced

On the supply side, the digital animation audiovisual industry in Brazil is focused on the production of content (short films, series or feature films made for TV, other channels and cinema and advertising pieces**),** and the production of visual effects used as inputs for other audiovisual products and games, as we can see below.

Chart 5 - Type of works produced



Source: Mapping of Animation in Brazil, 2019.

Source of resources and intellectual property ownership

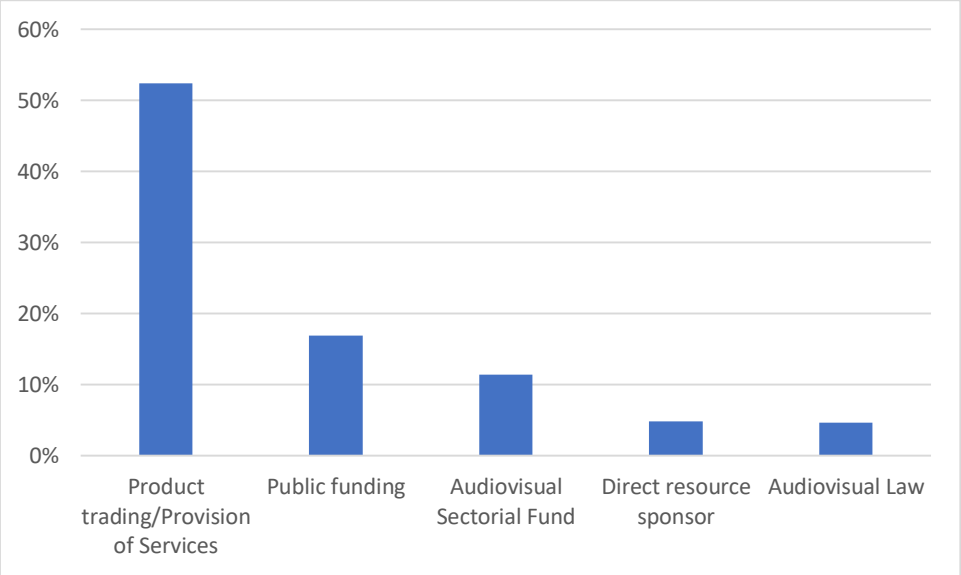
The audiovisual work of new and innovative animation is an immaterial, intangible content and fruit of human creativity, and can therefore be classified as **intellectual property**, in relation to copyright and trademark registration and patent, assuring its creator the right to protection and exploitation of the brand and characters created. Intellectual property generates revenue for the company and gives visibility to the brand and the characters, feeding a reputation that is key to the survival of companies in creative industry markets (Caves 2000; Gama 2014: 105).

In the case of the production of series or feature-length animated films for TV, direct-to-video and cinema, the advantage for the studio in the production of content is the possibility of **intellectual property ownership** and, consequently, the generation of complementary distribution incomes and **licensing** (Gama 2014: 101).

Despite the sale of products/services and the public funds/tax incentives being the main sources of resources for the Brazilian animation works, as shown in the graph below, the Brazilian animation industry has managed significant achievements, **with generation of intellectual property** over the past few years. Television production began to gain its first spaces with the release of series such as 'Peixonauta' (TV Pinguim 2009), shown in more than twenty countries; 'Escola pra Cachorro' (Mixer), that increased the viewing of Argentina's Nichelodeon channel in 138%; and 'Meu

AmigãoZão (2DLab)', third place in the Discovery Kids listings in Latin America. These were followed by the series 'Tromba Trem' and 'Carrapatos e Catapults'.

Chart 6 - Sources of resources and intellectual property ownership



Source: Mapping of Animation in Brazil, 2019.

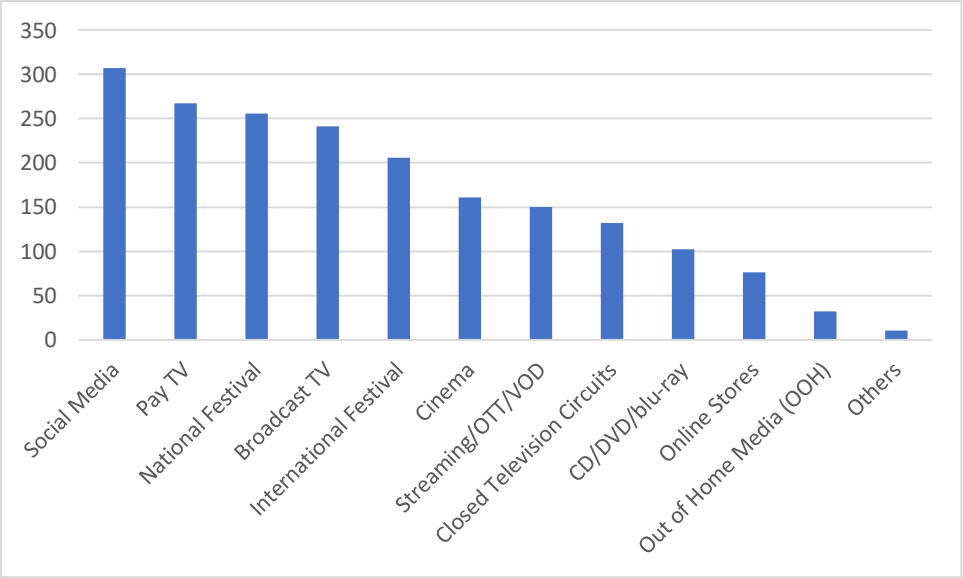
Distribution platforms of the animation segment

From a demand point of view, the main markets for digital animation are those in which the products consumed are feature films and animated short duration series for TV (the famous cartoons such as *SpongeBob* and *Peppa Pig*), animation series made to be viewed in a non-linear form by the consumer, such as DVDs, and digital services, which include video on demand (VOD), such as Now da Net, or subscribe Video on demand (SVOD), Netflix, and over the top such as iTunes and YouTube-like internet channels (Gama 2014: 102).

In the case of the Brazilian animation industry, it is observed that, although it is a very new segment in the audiovisual sector, it is the one that presents significant ascending growth. In just 10 years, the demand for animation content for the **various communication platforms** has increased considerably, which has enabled the emergence of Brazilian producers and studios specialised in the segment.

Chart 7 - Distribution platforms in the animation segment

(Interviewees were able to mark more than one alternative)

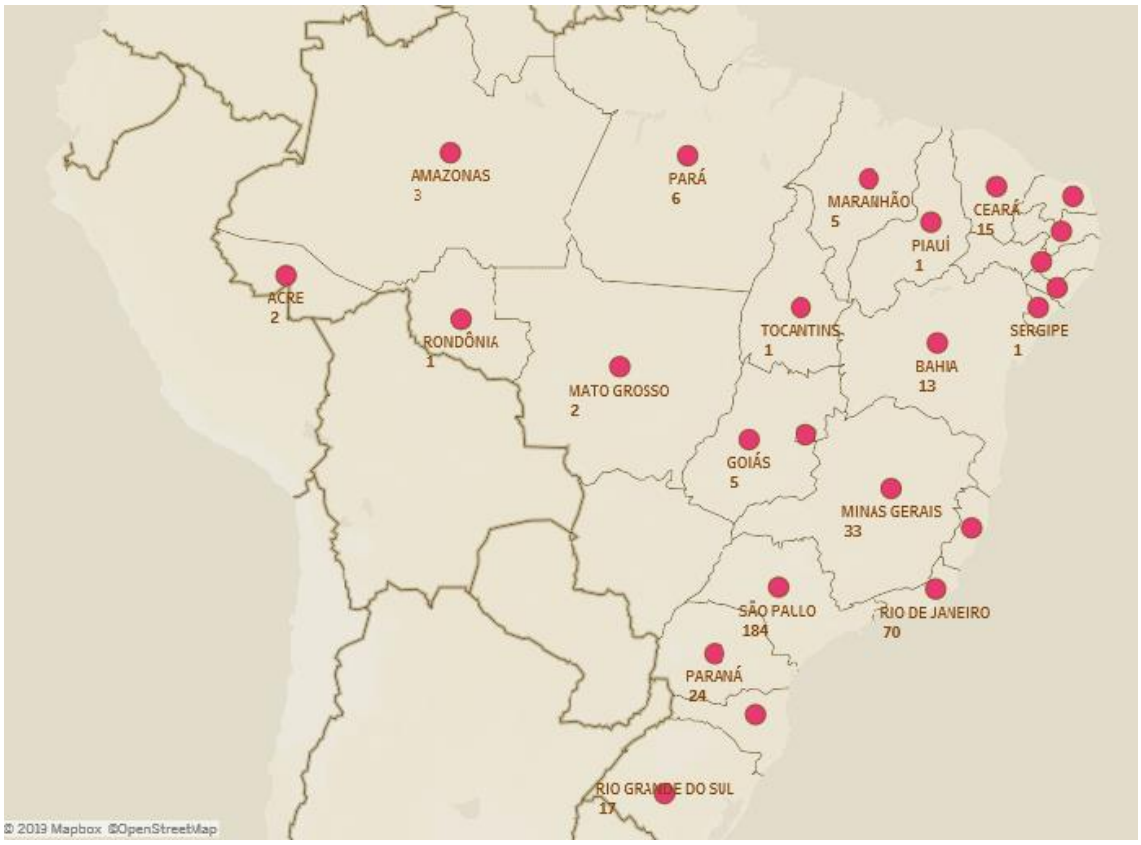


Source: Mapping of Animation in Brazil, 2019.

There are currently 25 animated series on air on Brazil's television channels, and several more in production. 15% of the programming network of Cartoon Network in Brazil, is made up of productions made in Brazil, including those on prime time. These are: "Irmão do Jorel" [*Jorel's brother*], "Turma da Mônica" [*Monicas's gang*], "Historietas Assombradas para Crianças Malcriadas" [*Haunted Cartoons for Spoiled Children*], "Sítio do Picapau Amarelo" [*Yellow woodpecker farm*], "Carrapatos e Catapultas" [*Ticks and catapaults*], "Tromba Trem" [*Bouncing train*], "Experimentos Extraordinários" [*Extraordinary experiments*] and "As aventuras de Gui e Estopa" [The Adventures of Gui and Estopa]. The main highlight is that these national series are audience leaders on their respective channels in Brazil and throughout Latin America.

So, in Brazil, **animation has achieved strategic status** in the productive chain of the creative industry. Talented animators, formerly absorbed by international studios, are now the producers and exporters of Brazilian animation content in a wide variety of formats (web content, games, applications, series, movies, VOD, licensed products). Studios have been established, government grant have been developed and lines of credit have become available. (Anima Mundi 2016: 18)

Chart 8 - Location of animation producers



Source: Mapping of Animation in Brazil, 2019.

From the 455 respondents to the Mapping of Animation in Brazil (179 companies and 276 freelance professionals), the great majority is in the southeast region of the country. However, with the advance of new production technologies, professionals in this productive chain are able to work remotely for clients from all parts of the world since great and static production infrastructures are not needed, as in the production of live-action. Therefore, the bigger the capacity for specialisation in the work of the animator, the greater the possibilities to act in various global products (Anima Mundi 2016:15).

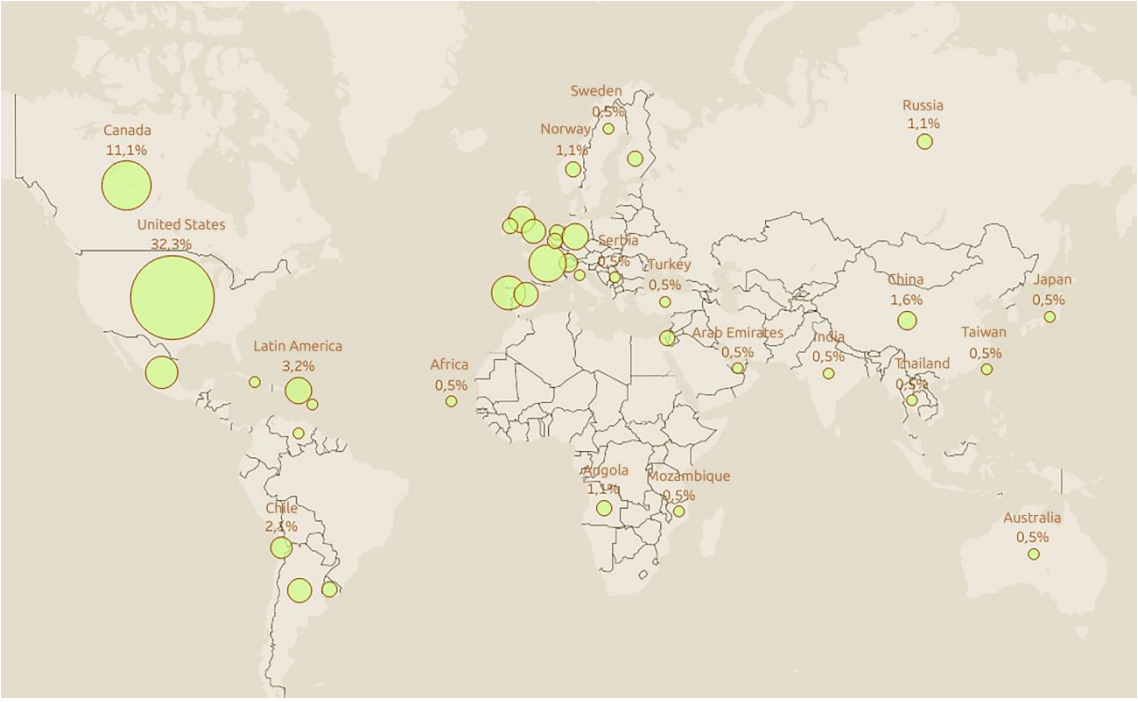
Export of content and service provision of animation to overseas companies

The movement of internationalisation of the production and of the division of animation work takes place through two parallel movements: **outsourcing** and **co-production.**

The fact that animation is a labour-intensive activity requiring a specialized workforce, has generated a cost structure that forces the outsourcing of animation production by large, globally competing firms located in developed countries to smaller studios located in developing countries where wage costs are lower (**outsourcing**). In the case of Brazil, 43% of Brazilian animation producers have exported animation content or services (Gama 2014: 117).

Part of the animation production of major studios in the main countries of production - the United States, Europe, Japan and Canada - is outsourced to small studios in developing countries, such as those located in Asia, especially South Korea, Taiwan, India, and China, but also to Brazil, a country which, in addition to guaranteeing low production costs, offers a workforce skilled in computer graphics - North America is where Brazilian producers mostly export content or animation services to, as can be verified in the graph below.

Chart 9 - Export of content and animation service provision to overseas companies



Source: Mapping of Animation in Brazil, 2019.

In this process, the studios of developing countries are still responsible for the creative core, which develops the concept, pre-production, post-production and distribution of the audio visual work, with greater added value, while the studios of the developing countries retain the production itself, of lesser value and technical complexity - and, without the property rights (Gama 2014: 117 and 135).

Nevertheless, the advantage of possible **outsourcing**, is the opportunity for studios in developing countries to gain expertise in higher quality animation production, as well as gaining knowledge of the best artistic and computational techniques, in addition to reduced costs and increased global animation output (Lee 2011: 16).

Co-production in the animation sector is also strategic for entering the global market competitively, with the creation of property rights and as a possible source of soft power.

Here, the question arises regarding "recognizable identity" or symbolic charge associated with an origin and with the sector, as Nye pointed out when talking about the great potential of anime and manga as a source of soft power. The recognition of an "identity" (associated with a geographical origin) is a fundamental factor for the adoption of a cultural product as a soft power resource of a certain locality, group or nation. This association is what will ensure that the benefits generated in symbolic, affective and political terms are linked to the promoter of soft power actions. However, the process of deterritorialization will influence the perception of origin of manifestations and products, like the various animations produced outside Japan with the same aesthetics and visual gags of animés. Added to this is the fact that in the process of deterritorialization, regardless of the existence of similar competitors, what assurance can be given that in the overall consumption processes there is a proper association of cultural expressions and products with their geographical origin? These points certainly pose risks to the question of recognition of an identity and perception of origin of animations.

In this sense, the SEA Project (South America - Europe - Asia) (Anima Mundi 2016: 30), which involved Brazilian, European and Japanese producers and creatives, illustrates well the trend towards deterritorialization and strengthening of connections between the international animation industry and young artists development across the three territories: Brazil, Europe, and Japan.

SEA (South America – Europe – Asia), supported by the MEDIA MUNDUS programme of the European Union, was a 2-week intensive concept development master class based on cooperation between three continents, each represented by the partners: Anima Mundi (Brazil), The Animation Workshop (Europe), and Office H (Japan). [iii]

This intensive master class was for concept development artists and animation creatives with a background of a junior or intermediate professional directors, concept artists, storyboard artists and designers from the international animation film industry.

Furthermore, the master class strengthened participants´ ability to create strong commercially viable concepts through case studies, and hands-on development processes. The main goal was to create new concepts and make them ready for the market – with export potential due to the dubbing tool and to universal visual language, making them more easily adaptable to markets in different countries - that can form the basis of new deterritorialized animation-based storyworlds, brands, and universes.

Animated Brazilian feature films are also beginning to gain ground, nationally and internationally: the Annecy International Animation Film Festival, the most important animation festival in the global market, held in France, has given awards to Brazilian

feature films for two years running. "Uma História de Amor e Fúria" [*A Story of Love and Fury*], by Luiz Bolognesi, was the winner of the Cristal award in 2013 and "O Menino e o Mundo" [*Boy and the world*], directed and produced by Alê Abreu, received the Cristal Award for Best Film selected by the Jury and the Public Prize, in 2014.

In January 2016, "O Menino e o Mundo" was nominated for the 2016 Oscars in the Best Animation category. Oscar-winning best foreign films tend to be those that have, or will have played on the festival circuit and have garnered prizes along the way, thus increasing their chances of playing as widely as possible in the US. They often have their own provocative back story. They usually have achieved both critical and public support (Dennison, 2017). “O menino e o mundo” didn’t win the Oscar, but has demonstrated its appeal to international-popular taste, having functioned very appropriately as a soft power resource.

The mobilization involved in getting that far was huge. Weeks before the production team set foot in Los Angeles, R $ 300,000 (75,000 pounds) had already been invested in the film’s international publicity campaign by SPCine - an office for the development, financing and implementation of programs and policies for the film and audiovisual sectors of the city of São Paulo.

SPCine took advantage of this animation for a soft power action, seeking to generate cultural, political, and economic benefits for the city, in an alternative approach to public development and management.

With the SPCine resources, the distributor was able to announce the feature in the main publications that revolve around the event. As an impact of the action, the film was distributed in more than 90 countries, won 45 international awards (including the Annie Awards of 2016, considered the American Oscar for animation, as best independent animated film). The consumption mobilized through these Festivals and prizes can be understood in a broader sense: it refers not only to their materiality or related products, but also to a whole set of symbols and ideas that collaborate in the construction of the images people have of Brazil. Leaving Brazil to reach consumers all over the world, the feature created movements of financial resources, people, ideas and ideals that involve and affect individuals, economies and policies (especially in Brazil itself).

SPCine has since created a Government Programme to stimulate the city as a creative hub for animation, with the slogan "São Paulo - An Animation City", the first and only measure of the use of animation as a soft power resource in Brazil. However, the slogan did not have repercussion in the national press, nor of the international media, and was completely forgotten after the change of administration in the City Council.

A new opportunity for the opening of visibility flows occurred in 2018: Brazil was selected as the country to be honoured at the Annecy Festival in France, which features a retrospective of films, a panorama of contemporary artists, an exhibition and the presence of a special delegation and presentation at MIFA - The International Animation Film Market. The choice clearly demonstrated the potential and attractiveness of Brazilian animation in the eyes of the Festival curators and the French public, and their likely effect on both the nation as soft-power powerhouse, and on film production in the country more broadly speaking.

Nevertheless, the actions promoted by the Brazilian government (through the Brazilian Cinema Program, Apex / Ministry of Foreign Affairs) didn´t consider the condition imposed on a potential soft power resource: the ability to create actions of self-promotion and, systematically squandered its potential reserve of soft power.

The initiatives outlined above describe a scenario in which, with varying degrees of success, an emerging nation with a strong domestic audio-visual industry but no sense of 'national film and audiovisual brand' on the international arena, has been working to increase its visibility. However, within this effort to increase visibility, soft power kudos is a bonus, rather than the prize in sight, which ultimately continues to be increased sales (Dennison 2017: 25).

In discussing culture in the context of public diplomacy, or rather, as an instrument of foreign policy, Joseph Nye's soft power concept draws attention to the fundamental role of legitimisation held by culture in the international actions of a country. In this sense, cases of internationalization of Brazilian animation products and services show that soft power can undeniably be used as an instrument of government foreign policy, as it is connected to standards of behaviour and consumption. However, in order to use the audiovisual - and specifically animation -, as an instrument of soft power, effective methods of internationalisation must be explored (Dennison 2017: 20).

In this chapter, the presentation of the set of indicators able to describe the reality of the productive chain of animation in the country becomes an important analysis and planning resource for the development policies of the animation sector, within planned intervention. It also points to the potential of using animation for foreign policy purposes, along the lines of the theoretical model of soft power as developed by Joseph Nye.

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[i] In 1996, Simon Anholt coined the term ‘nation brand’ and originated an important field of research and practice. Since then, he has advised Heads of State and Heads of Government in 56 countries to help them plan the policies, strategies, investments and innovations to lead their respective countries towards an improved profile and reputation. In addition to his advisory work, Professor Anholt developed the measurement systems: the Nation Brands IndexSM (NBI) and City Brands IndexSM (CBI), to assess how citizens of the world view the nations, cities and regions of the world (IPSOS, 2019).

[ii] The research was carried out with foreign business people in nine different countries.

[iii] See http://seamasterclass.com/wp-content/uploads/2014/02/SEA-Business-Events.pdf. Accessed on June, 10, 2019.