



**Sharing Best Policy
Practices to Develop
and Promote MSMEs
Access to Digital
Cultural and Creative
Industries**

August 2025



**Asia-Pacific
Economic Cooperation**



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Sharing Best Policy Practices to Develop and Promote MSMEs Access to Digital Cultural and Creative Industries

APEC Digital Economy Steering Group (DESG)

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TABLE OF CONTENTS

EXECUTIVE SUMMARY	5
KEY OUTPUTS	9
KEY OUTCOMES	21
SEVEN LESSONS LEARNED	26
CASE STUDIES AND PRACTICAL TOOLS FOR INDUSTRY PRACTITIONERS AND POLICYMAKERS	31
SURVEY RESULTS	81
WORKSHOP INSIGHTS	91
FINAL CONCLUSIONS	97
RECOMMENDATIONS FOR APEC ECONOMIES	104
REFERENCES	109
ANNEXES	116

01

EXECUTIVE SUMMARY

01

EXECUTIVE SUMMARY

This report, developed under the Asia-Pacific Economic Cooperation [APEC] Project DESG_203_2023A, explores the best policy practices to enhance micro, small and medium-sized enterprises' (MSMEs) access to cultural and creative industries (CCIs) in the digital era. The study responds to the increasing relevance of CCIs as engines of innovation, social cohesion, and inclusive economic growth, aligned with APECs strategic priorities and the Sustainable Development Goals (SDGs).

The research was built upon four complementary sources of information:

- i. **10 case studies** from APEC economies (Australia; Canada; Chile; China; Indonesia; Korea; Mexico; Peru; Singapore; Thailand), selected for their geographic diversity and strategic integration of CCIs in domestic development agendas. These cases revealed practical tools that could be adapted or replicated, including sector-specific funds, incubation programs, credit guarantee schemes and gender-responsive financing.
- ii. **5 expert interviews**, providing qualitative insights grounded in institutional and territorial experience. These conversations emphasized the importance of inclusive regulatory frameworks, public sector professionalization and co-creation of policy with ecosystem actors.
- iii. **A regional survey** was conducted by 80 key stakeholders from the creative economy and public policy sectors in 14 economies, which helped identify cross-cutting challenges such as informality, financing gaps, undervaluation of intangible assets and regulatory barriers.
- iv. **A regional workshop** with 15 specialists in MSME and CCI policy, using the World Cafe methodology to foster collaborative dialogue on gender inclusion, sustainability and innovation in public policy.

Key findings highlight that digital transformation is a critical enabler for MSME growth in the creative economy; public-private partnerships are essential to scale solutions; and gender-inclusive, decentralized policies strengthen ecosystem resilience. Additionally, seven key lessons were identified, emphasizing the need for an inclusive definition of CCI, progressive approaches to formalization and recognition of the economic value of intangible assets.

This report aims to serve as a practical resource for policymakers, public institutions and creative economy leaders by providing comparative evidence and concrete recommendations to foster more innovative, inclusive and sustainable economies across the APEC region.



1.1 Background

Micro, small, and medium-sized enterprises (MSMEs) play a crucial role in economic growth, job creation and innovation. The cultural and creative industries (CCIs) have emerged as a significant sector offering new opportunities for MSMEs, especially in the digital era. However, many MSMEs face barriers in accessing CCIs, including regulatory, financial and technological challenges. This report explores the best policy practices that facilitate MSMEs participation in CCIs within APEC economies

1.3 Key Findings

- Digital transformation is a fundamental enabler for MSMEs to scale their creative businesses.
- Public-private partnerships are essential in fostering access to CCIs.
- MSMEs face financial constraints and need improved access to funding mechanisms tailored to CCIs.
- Gender-inclusive policies enhance the participation of women entrepreneurs in CCIs.

1.2 Objectives

The objectives of this study are:

- To identify policies and best practices supporting MSMEs integration into CCIs across APEC economies.
- To analyze case studies from 10 APEC economies, ensuring 40% of the cases focus on women-led MSMEs.
- To highlight innovative solutions leveraging technology in CCIs to enhance MSME participation.
- To provide policy recommendations to strengthen MSME access to CCIs in the digital economy.

02

**KEY
OUTPUTS**

02

KEY OUTPUTS

This final report presents the comprehensive results of a multi-phase initiative aimed at strengthening the role of cultural and creative industries (CCIs) in the development of micro, small, and medium enterprises (MSMEs) across APEC economies. The project delivered three key outputs: the Project Report, which includes case studies and in-depth interviews; the Pre-Workshop Research Phase, based on a cross-economy survey; and the Workshop, a virtual session with participatory activities. Each output contributes critical insights and data that together form a robust foundation for evidence-based policy recommendations.



2.1 Project Report

The first major outcome of this project was the production of a cross-economy Project Report, a central effort that explored how cultural and creative industries (CCIs) are being integrated into MSME development strategies across 10 APEC economies: Australia; Canada; Chile; China; Indonesia; Korea; Mexico; Peru; Singapore; and Thailand. The objective of the Project Report was to identify and analyze the best public policy practices that support the growth and development of cultural and creative MSMEs (CCIs) across APEC economies.

This report was more than just a mapping exercise; it was a deliberate attempt to uncover and learn from the diverse policy landscapes shaping creative entrepreneurship across the region. From the outset, the objective was clear: to identify and analyze the most effective public policy practices that support the growth, resilience and innovation of cultural and creative MSMEs. A strong emphasis was placed on inclusion, with at least 40% of the selected cases featuring policy instruments aimed at promoting or enhancing women's economic participation, acknowledging that in many regions of the world, women are deeply embedded in the social fabric through their engagement in economic activities that underpin the cultural and creative industries.

The research process combined a comprehensive review of academic literature, international reports, public policies, and government documents with a practical, comparative lens. Based on this, a structured

analytical framework was developed to assess how CCIs contribute to MSME development across diverse contexts. Drawing on the case study, semi-structured interviews with experts were then conducted to deepen the analysis, followed by a validation survey to reinforce key findings through direct stakeholder feedback.

The selection of these ten economies was intentional and strategic. Each represents a unique institutional, geographic and cultural perspective within APEC, offering valuable contrasts and common threads. While other economies have made important advances in the creative sector, these tens stood out for having explicitly incorporated MSMEs into their domestic development strategies, treating them not merely as business units but as essential engines of economic and social progress. This integration, which is still lacking in some APEC contexts, set a critical foundation for the depth of this study.

Through this lens, the report examined each economy's ecosystem, identifying key development priorities, progress in digital transformation, measures to support women's participation and the positioning of cultural and creative industries, whether as complementary to science and tech innovation, or as standalone drivers of growth. A detailed list of all the programs analyzed in this initial report is available in Annex 1.

To guide comparative analysis, the study focused on eight strategic policy areas, which emerged as fundamental pillars for strengthening MSMEs in the creative economy:

- **Mentoring:** Mentoring programs provide MSMEs with essential knowledge and expertise to overcome challenges in areas such as business management, market expansion and access to financing. These programs are vital for connecting entrepreneurs with experts who can guide them through critical growth stages (Pardo-del-Val et al., 2024).

- **Investment and Financing:** Access to capital remains one of the most significant obstacles for MSMEs. Public policies that include soft loans, grants and credit guarantees play a crucial role in reducing financial barriers, especially in the early stages. Additionally, tax incentives for private investors, such as venture capital funds, help MSMEs secure the resources necessary for growth (Pardo-del-Val et al., 2024; Asia Pacific Foundation of Canada, 2021).

- **Incubators and Accelerators:** These programs provide not only physical space but also legal, accounting, and mentoring services, along with networking opportunities. Incubators and accelerators have been shown to accelerate MSME growth by offering entrepreneurs the support needed to bring their ideas to market (Pardo-del-Val et al., 2024).

- **Support for Innovation:** Policies promoting the co-creation of innovative products through open innovative platforms and collaboration between companies are essential for MSME development. This includes encouraging R&D activities, enabling MSMEs to create competitive products aligned with global market demands (Asia Pacific Foundation of Canada, 2021).

- **Improving the Regulatory and Fiscal Environment:** Simplifying administrative procedures and reducing tax burdens are critical steps toward improving the operational environment for MSMEs. Moreover, flexible labor policies that allow companies to hire and retain specialized talent are essential for enhancing competitiveness and fostering growth (Pardo-del-Val et al., 2024; Asia Pacific Foundation of Canada, 2021).

- **Support for Internationalization:** MSMEs must be prepared to expand into global markets. Policies that facilitate access to international markets through the establishment of contacts and global innovation networks are fundamental to the sustainable growth of these enterprises (Asia Pacific Foundation of Canada, 2021).

- **Encouraging Entrepreneurial Recycling:** Entrepreneurial recycling promotes the flow of resources, talent and knowledge within the entrepreneurial ecosystem. Policies supporting this process enable successful or failed entrepreneurs to reuse their experiences and resources to start new ventures, strengthen support networks, and contribute to the broader business ecosystem (Pardo-del-Val et al., 2024).

- **Institutional Framework:** While not a standalone policy, it is essential to highlight the efforts to institutionalize MSME support as part of domestic development strategies. According to Pardo-del-Val et al. (2024), the institutional framework plays a crucial role in supporting entrepreneurial ecosystems by ensuring that public administration is equipped to facilitate MSME growth. This includes establishing dedicated institutions that provide legal, financial and administrative assistance to MSMEs, alongside fostering collaboration between government bodies, universities, and industry to create a more cohesive and supportive environment for entrepreneurs. By strengthening the institutional framework, governments can ensure that MSMEs are better positioned to contribute to domestic economic development.

To further enrich the case study findings and ensure regional representativeness, a complementary set of in-depth interviews was conducted with five policy experts from

both APEC and non-APEC economies. These interviews followed a structured guide developed within the framework of the DESG 203 2023A project – Sharing Best Policy Practices to Develop and Promote MSMEs Access to Digital Cultural and Creative Industries – ensuring consistency and alignment with the project’s analytical objectives.

Rather than relying on a fixed script, the interviews followed a semi-structured protocol that allowed flexibility while remaining grounded in the instrument’s framework, with the complete set of guiding questions and structure provided in Annex 2. This approach enabled a deeper understanding of domestic strategies and institutional innovations, while also highlighting conceptual gaps and practical challenges faced by governments and ecosystem actors in supporting creative MSMEs. The results of these interviews enriched the Project Report with grounded insights, complementing the broader survey and case study data with lived experience and policy expertise from the field.

In accordance with international research ethics standards and APEC principles of openness and transparency, participants were invited to contribute to their public or expert capacities. Their insights are therefore not presented anonymously but are attributed with accuracy and professional respect, reflecting their institutional roles and responsibilities at the time of the interview. The interviewees are listed below as recognized contributors to this study and its policy-relevant findings



Carolina Pereira (Chile): Executive Secretary for Creative Economy at the Ministry of Cultures, Arts and Heritage of Chile, responsible for domestic strategy coordination in the creative industries.



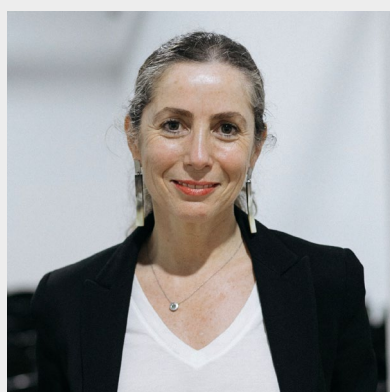
Felipe Buitrago (Colombia): Former Minister of Culture of Colombia (2021) and Ambassador of Colombia to Germany (2022), known for work on creative economy policy during the administration of President Iván Duque Márquez.



Dwinita Larasati (Indonesia): Former Chair of the Bandung Creative City Forum and advisor to West Java's Creative Economy Committee



Carlos Lara (Mexico): Cultural policy researcher and former Coordinator of the Centro de Cultura Digital Mediatelecom. Work on El Salario Emocional de la Cultura has become a key reference for understanding cultural rights and institutional development in Mexico.



Trinidad Zaldivar (Inter-American Development Bank): Chief of the Creativity and Culture Unit, where they lead projects to foster inclusive, sustainable cultural economies in Latin America.

The insights provided by these expert participants served to deepen the policy analysis and bring forward contextually grounded recommendations, ensuring the Project Report reflects both the complexity and the richness of creative MSME policy landscapes across the APEC region. Full interview transcripts are available in Annex 3.

Images:

<https://cl.linkedin.com/in/carolina-pereira-1a289660>

<https://revistadc.com/arte-y-letras/felipe-buitrago-restrepo-nombrado-como-nuevo-ministro-de-cultura/>
<https://pec.ac.uk/pecpeople/tita-larasati/>

<https://atribudelpulgar.com.mx/carlos-lara/>

<https://x.com/trinidadzaldiv1>

2.2 Pre-Workshop Research Phase

The second major component of this project was the cross-economy research phase, built around the development and implementation of a survey instrument aimed at assessing the challenges, opportunities, and specific needs related to incorporating cultural and creative industries (CCIs) within micro, small, and medium-sized enterprises (MSMEs) across APEC economies. The instrument was inspired by a similar survey conducted by the European Union¹ on the challenges and needs of CCIs and was further refined based on preliminary findings from this project's case analysis. Its objective was to generate relevant data to inform regional policy design and to enhance the integration of MSMEs into the creative economy.

Aligned with Sustainable Development Goals (SDGs) 5 (Gender Equality), 8 (Decent Work and Economic Growth), and 9 (Industry, Innovation and Infrastructure), the survey focused on key dimensions such as access to finance, talent development, regulatory barriers and digital adaptation. Addressing these areas is critical to helping policymakers and business leaders identify strategic actions that support MSME competitiveness, particularly in creative sectors where adaptability and innovation are essential (Asia Pacific Foundation of Canada,

2021; Pardo-del-Val et al., 2024; United Nations Conference on Trade and Development [UNCTAD], 2022).

To ensure a comprehensive assessment, the instrument was structured into five thematic sections:

- **General Information:** Gathering background on the respondent's role, institutional affiliation and domestic context.
- **Community and Local Economic Impact:** Exploring the influence of CCIs on local economies and job creation.
- **Core Challenges and Priorities for CCIs:** Identifying urgent barriers related to financing, digital gaps and innovation needs.
- **Technological Advancements and Skill Development Needs:** Examining the relevance of digital tools, skills and innovation ecosystems for CCI competitiveness.
- **Public Policy and MSME Development:** Analyzing how public institutions support the integration of CCIs in MSME strategies, with particular attention to gender inclusion and institutional resilience.

1. European Commission. (2024). Needs and challenges of the cultural and creative industries. Directorate General for Internal Market, Industry, Entrepreneurship, and SMEs. https://single-market-economy.ec.europa.eu/sectors/cultural-and-creative-industries/needs-and-challenges_en

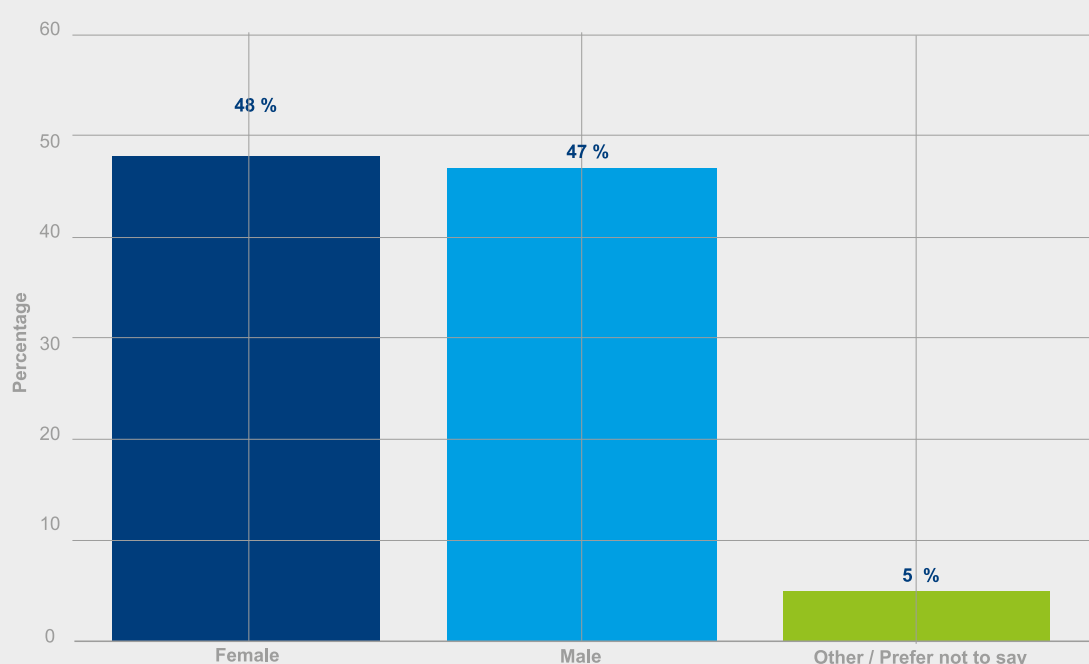
The full list of survey questions is available in Annex 4.

The survey was distributed among experts and stakeholders in the creative economy and public policy sectors across 14 economies: Australia; Canada; Chile; China; Hong Kong, China; Indonesia; Japan; Mexico; New Zealand; Peru; the Philippines; the Russian Federation; Singapore; and four non-APEC economies: Colombia; Ecuador; Uruguay; and Brazil.

A total of 80 valid responses were collected. The sample was evenly distributed between East and West (40 responses each), ensuring a balanced cultural perspective in the analysis.

In terms of gender, 48% of respondents identified as women and 47% as men—consistent with the high rate of female participation typically seen in CCLs.

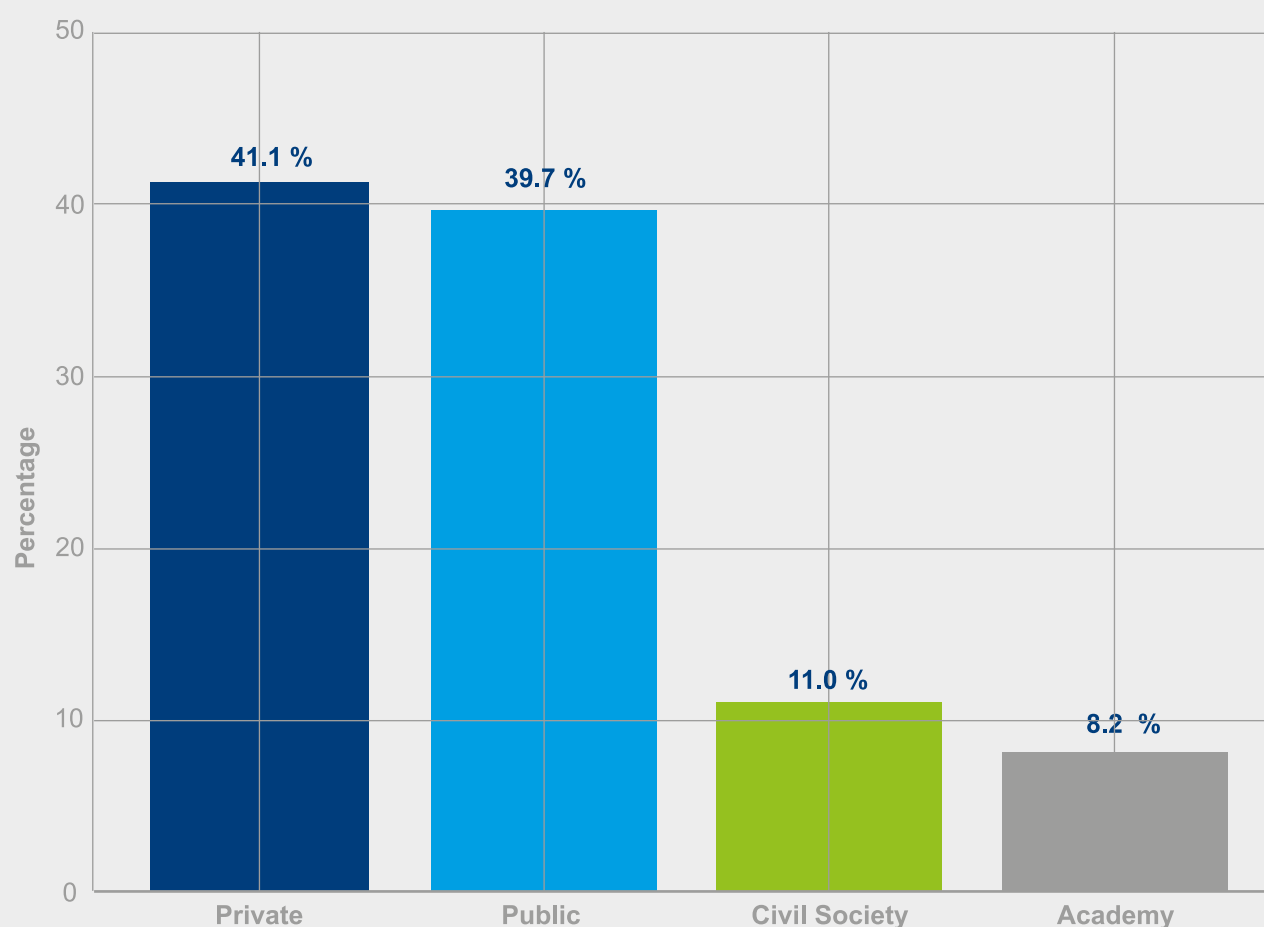
Figure 1. Gender Distribution of Survey Respondents



Source: DESG 203 2023A Survey (2025)

Regarding institutional affiliation, 40% of responses came from the public sector and 41% from the private sector, with the remainder distributed across academia and civil society organizations.

Figure 2. Institutional Affiliation of Survey Respondents



Source: DESG 203 2023A Survey (2025)

This diverse and balanced sample provided a strong foundation for cross-economy analysis, ensuring that the perspectives captured reflect a wide range of institutional backgrounds, regional contexts and gender representation across APEC economies.

2.3 Workshop

The third major component of this project was a virtual workshop convened on 30 January 2025 under the title Impact of Development Policies for MSMEs on Digital Cultural and Creative Industries, as part of the project's multi-phase methodology. This event brought together 15 high-level participants from APEC and non-APEC economies, each with strategic responsibilities in the formulation and implementation of public policies related to micro, small and medium enterprises (MSMEs) and cultural and creative industries (CCIs).

The purpose of the workshop was to establish a collaborative environment for peer learning, focused on the effectiveness of development policies supporting MSMEs in the digital creative sector. By facilitating dialogue among stakeholders with diverse institutional perspectives, the workshop aimed to validate preliminary findings from earlier research phases, enrich the comparative analysis, and shape forward-looking recommendations for the APEC region.

To ensure inclusive participation and co-construction of ideas, the workshop adopted the World Cafe methodology, a structured conversational process designed to promote collaborative thinking in an informal, dynamic setting. Conducted virtually using breakout rooms, the methodology enabled participants to rotate between three thematic rooms, each focused on a strategic policy question:



- **Room 1:** How can public policies be adapted to foster innovation and sustainability in creative MSMEs?
- **Room 2:** How can public policies strengthen the growth of creative MSMEs through gender inclusion?
- **Room 3:** How can decision-makers be better educated to diversify support beyond financing?

Each room was hosted by a designated facilitator who remained throughout the entire activity to ensure continuity, welcome new participants during each rotation and record the central ideas emerging from each discussion. In each of the three 20-minute rounds, participants contributed ideas, shared institutional experiences and proposed strategies in response to the guiding question. At the end of the rotations, hosts presented a synthesis of the discussions in a final plenary session, enabling participants to collectively reflect on the proposals and lines of action generated.

To provide a common foundation for discussion, the workshop opened with a contextual presentation of the preliminary findings from the Project Report and partial results from the regional survey. This framing ensured that all participants were equipped with key insights to engage in more informed and focused deliberation.

Table 2. Workshop Agenda – 30 January 2025

Time (UTC)	Session
14:00–14:10	Opening remarks and welcome
14:10–14:30	Presentation of key findings from the Project Report and survey
14:30–14:40	Explanation of the World Cafe methodology
14:40–15:00	First round of discussion in breakout rooms
15:00–15:20	Second round of discussion in breakout rooms
15:20–15:40	Third round of discussion in breakout rooms
15:40–16:00	Break
16:00–16:40	Plenary session – report back from each room
16:40–17:00	Final reflections and closing remarks

Source: Prepared by the project team under the APEC DESG 203 2023A initiative.

The application of the World Cafe methodology, structured into three rotating rounds, was fundamental in fostering a participatory, open and progressive dynamic of exchange. Each room remained focused on a specific question and the role of the host was instrumental in connecting ideas across sessions and synthesizing insights for the plenary report. The design of the workshop promoted a trust-based environment in which participants felt empowered to share their ideas, uncertainties, and institutional experiences. This approach contributed significantly to the collective construction of proposals and to the final reflections presented in this report.

A transcription of the discussion structure and workshop questions is provided in Annex 5.



03

**KEY
OUTCOMES**

03

KEY OUTCOMES

This project aligns with APECs longstanding commitment to strengthening the role of micro, small and medium-sized enterprises (MSMEs) as engines of sustainable, inclusive and innovation-driven growth. MSMEs account for over 97 percent of all businesses in the region, providing most private-sector employment and approximately half of private-sector output (APEC SME Working Group , 2024). Recognized as a priority since the 1993 APEC Leaders' Meeting in Seattle, MSME development remains central to regional strategies for enhancing competitiveness, digital integration, and cross-border trade.



The project is intended to directly align with the Putrajaya Vision 2040 and the Aotearoa Plan of Action, which together promote innovation and digitalization as key economic drivers. These frameworks call for the creation of ecosystems that empower MSMEs, including those in the creative economy, to fully participate in the digital economy and contribute to sustainable development (APEC Secretariat, 2020; APEC Secretariat, n.d.). The project is also consistent with the SME Working Group Strategic Plan 2021–2024, which prioritizes inclusive capability development for digitalization and encourages the sharing of best practices among member economies (APEC, 2020).

Within this policy context, cultural and creative industries (CCIs), which encompass music, film, design, and digital content, have emerged as strategic sectors with high potential for MSME engagement.

These industries account for nearly 3 percent of global GDP and offer strong contributions to employment, income generation, and cultural participation. Digital transformation has accelerated their growth, opening new pathways for creation, distribution and global market access. The APEC region,

with its cultural diversity and expanding digital connectivity, is uniquely positioned to harness the potential of CCIs to drive innovation and resilience among MSMEs.

The recent global health crisis reinforced the strategic value of the creative sector. While many traditional MSMEs suffered closures, CCIs adapted rapidly by adopting emerging technologies, demonstrating resilience and flexibility in the face of economic shocks. As MSMEs confront pressures stemming from sustainability, digitalization, automation, and shifting consumer behavior, CCIs offer an alternative development pathway rooted in adaptability and inclusive value creation.

By supporting knowledge exchange and collaborative policy design, this project contributes to regional capacity building and helps identify replicable tools that promote MSME participation in CCIs. It is aligned with the objectives of the APEC Digital Innovation Sub-Fund and supports the implementation of the Internet and Digital Economy Roadmap and the Cross-Border E-Commerce Facilitation Framework (APEC, 2017a; APEC, 2017b). In particular, the project advances shared goals such as policy coherence in digital governance, enhanced access to digital markets and structural reform to promote MSME integration into future-facing industries.

Through a combination of case studies, stakeholder interviews, a policy workshop and a regional survey, this project seeks to deliver three core outcomes:

3.1 Increased Knowledge & Capacity

One of the primary goals of this initiative is to enhance the technical capacity of policymakers and stakeholders in APEC economies to design, implement and evaluate MSME-friendly policies for the creative sector. The case studies demonstrate how coordinated institutional strategies, such as those seen in Canada; Korea; and Singapore, can be adapted to different economic contexts. The interviews with regional experts and policymakers reinforce the importance of cross-sector dialogue and participatory design in strengthening policy coherence.

The insights gained through this study, made possible by expert contributions, provide practical understanding of how innovation can be integrated into policy design and implementation. This includes approaches such as adopting new financing models, establishing regional incubation schemes, and developing digital infrastructure for creative enterprises. These findings are consistent with APECs broader efforts under the Enhanced Agenda for Structural Reform (EAASR) to support institutional reforms that make economies more responsive, resilient, and inclusive (APEC Secretariat, n.d.).

3.2 Promotion of CCI Development in APEC Economies

This project supports the development of CCI-specific policy frameworks that expand MSME engagement and unlock the economic, social and cultural value of the creative economy. Economies such as Chile and Thailand have demonstrated that even incremental policy shifts, when backed by institutional leadership and multi-stakeholder collaboration, can reposition CCIs as key contributors to sustainable development and post-crisis recovery.

By synthesizing and sharing these experiences, the project aims to catalyze new policy initiatives and deepen regional collaboration. Participants will be encouraged to adapt tools such as creative industry funds, cultural export strategies and gender-inclusive financing programs to their economy. Over time, this will help embed CCIs within long-term economic planning across the region and increase their visibility as strategic development sectors.



3.3 Greater MSME Participation in the Digital Economy

The project reinforces APECs vision of a digitally connected and innovative-driven regional economy by supporting MSMEs integration into CCIs through digital transformation. Many creative MSMEs are at the forefront of digital adoption, leveraging platforms for content creation, online distribution, and international collaboration. However, access gaps remain significant, especially in rural and underserved areas.

Through this initiative, participants will explore mechanisms to bridge the digital divide, including infrastructure investments, regulatory simplification, and digital literacy programs

tailored to creative entrepreneurs. The project also encourages cross-border cooperation to expand market access for creative content and facilitate regional value chains in the digital economy.

This outcome strongly supports the Cross-Border E-Commerce Facilitation Framework and the Digital Innovation Sub-Fund's objective of enhancing MSME access to the digital ecosystem (APEC, 2017b).

04

**SEVEN LESSONS
LEARNED**

04

SEVEN LESSONS LEARNED

To condense the lessons captured from interviews, surveys, the workshop, and success cases, we present the 7 most relevant takeaways from this research.

4.1 **Effective policies begin with a clear, inclusive, and operational definition of creative industries**

A cross-cutting insight from this report is that how the creative sector is defined directly shapes who gains access to public policy tools and which ventures are recognized as part of the ecosystem. Overly narrow definitions, limited to traditional arts or conventional cultural sectors, exclude emerging areas such as video games, digital experience design, heritage-based gastronomy and applied arts for social innovation. Policymakers must promote a shared, inclusive and functional definition of CCIs that captures both cultural and economic dimensions, allowing policies to be precise yet adaptable, and developed in close consultation with ecosystem stakeholders.

4.2 **Informality should not be a barrier, but a starting point for progressive formalization**

A significant number of creative MSMEs operate in informal or semi-formal settings. This limits their access to financing and public programs and restricts their sustainability and scale. Yet, the report shows that many of these ventures generate high symbolic, social and cultural value. Public policies should acknowledge this reality and foster step-by-step formalization pathways through incentives and technical support, rather than applying punitive measures that exclude emerging entrepreneurs. Formalization should be a facilitated goal, not a rigid prerequisite.

4.3 **The value of intangible assets must be recognized and protected as part of productive capital**

Creative MSMEs produce value through ideas, knowledge, cultural content and applied creativity. However, in many contexts, these intangible assets are not accepted as sufficient collateral for credit, investment, or market entry. The report highlights the need to strengthen intellectual property systems, copyright registration, protection of traditional knowledge and certification of sectoral brands. Decision-makers should develop proactive policies to support the registration, protection and economic valorization of these assets as a foundation for growth.

4.4 **Policies must bridge creativity and productivity, overcoming fragmented sectoral approaches**

One of the main challenges identified in the report is the fragmentation between cultural, economic, innovative and social development policies. This disconnect prevents recognition of the cross-sectoral potential of creative MSMEs as drivers of transformation. Public policy must promote synergies between creative and traditional sectors, such as design and textiles, animation and education, or storytelling and tourism, through instruments that enable collaborative projects, value chain integration and creative knowledge transfer. This calls for strategic vision, shared resources and strong inter-ministerial coordination.

4.5 **Creative industries are also spaces for social innovation and civic engagement**

Beyond their economic contribution, many creative MSMEs play a key role in promoting inclusion, community cohesion, social reconstruction and the expression of cultural identity. This is especially evident in initiatives led by women, youth, Indigenous peoples and migrant communities. Public policies must recognize and support this social dimension by investing in programs that foster social innovation, community engagement, collaborative production and cultural decentralization. This approach expands the impact of policy beyond traditional economic indicators.

4.6 **Public sector capacity must be strengthened to implement CCI-specific policies effectively**

A critical lesson is that many policies failures stem not from design flaws, but from implementation gaps, such as limited knowledge among public staff, lack of specialized training, institutional instability and weak coordination with stakeholders. Decision-makers should invest in building public sector capacities, including the creation of specialized units, improved monitoring and evaluation systems and partnerships with intermediary organizations. Implementation capacity is a structural requirement for sustainable and impactful policies.

4.7 **Active participation from the creative ecosystem improves the legitimacy and relevance of public policies**

The report shows that the most relevant and sustainable policies are co-designed with ecosystem actors, including creator associations, sectoral guilds, universities, incubators, local governments and entrepreneurs. Co-creation processes allow for better diagnosis of real needs and enhance ownership, institutional trust and policy continuity. It is recommended that governments institutionalize participatory mechanisms such as advisory councils, permanent dialogue platforms, participatory pilots and citizen-led evaluation systems.

05

**CASE STUDIES AND
PRACTICAL TOOLS
FOR INDUSTRY
PRACTITIONERS AND
POLICYMAKERS**

05

CASE STUDIES AND PRACTICAL TOOLS FOR INDUSTRY PRACTITIONERS AND POLICYMAKERS

The following section presents ten case studies from APEC economies that have developed distinct approaches to supporting micro, small and medium-sized enterprises (MSMEs) in the cultural and creative industries (CCIs). These experiences illustrate a broad spectrum of institutional tools, financial innovations and policy frameworks designed to integrate CCIs into economy-wide development strategies. Each case sheds light on specific strengths and challenges that shape the design and implementation of effective support mechanisms. The practical insights gathered from these diverse trajectories aim to inform future interventions, strengthen policy coherence and promote the replication of successful strategies across the APEC region.

5.1 Case Studies: Experiences of MSME integration into Cultural and Creative Industries (CCIs)



5.1.1. **Australia**

Australia's approach to supporting micro, small, and medium-sized enterprises (MSMEs) in the cultural and creative industries (CCIs) has evolved incrementally over the past two decades, favoring a pragmatic blend of innovation-driven programs, regional development initiatives and public-private collaboration. Rather than enacting a singular, centralized strategy for CCIs, the economy has implemented a series of targeted instruments embedded within broader industry and entrepreneurship frameworks. These efforts reflect both Australia's federal structure and its commitment to fostering inclusive economic growth through creativity and innovation.

A foundational shift occurred in 2014 with the launch of the Entrepreneurs' Programme, under the Department of Industry, Science and Resources. The program included the Accelerating Commercialization stream, which provided matched funding and expert advice to startups, including creative ventures leveraging digital platforms, immersive content and design innovation. This support helped address the early-stage funding gap faced by many creative entrepreneurs, especially those operating outside traditional arts institutions (Government of Australia, Department of Industry, Innovation and Science, 2017).

In 2016, Australia deepened this agenda through the Business Research and Innovation Initiative (BRII), which offered grants to enterprises developing solutions to public sector challenges. Creative technology firms

responded to BRII calls by developing user-centric digital tools, visualizations and cultural heritage applications. Although not limited to CCIs, BRII opened opportunities for cross-sector engagement and highlighted the value of creative problem-solving within government (Nous Group, 2021).

On the cultural policy front, the rebranding of the Australia Council for the Arts as Creative Australia in 2023 marked a renewed federal commitment to creative entrepreneurship. Operating under the new National Cultural Policy, Creative Australia expanded its funding streams to include First Nations artists, diverse practitioners and commercially oriented creative projects, a key shift from traditional arts subsidy models (Creative Australia, 2023).

Australia's commitment to regional inclusion was reflected in the Regional Growth Fund and associated state-level initiatives that channeled resources into developing infrastructure and creative clusters outside major urban centers. These funds have supported film production hubs, Indigenous art centers, and regional design studios, although access remains uneven across states due to variations in local governance capacity (South Australian Film Corporation, 2022).

In 2023, the federal government introduced the Industry Growth Program as a successor to the Entrepreneurs' Programme, aimed at supporting early-stage commercialization for SMEs in strategic sectors, including digital and cultural technologies. While still in its early



implementation phase, the program promises to provide tailored business advice and investor matchmaking for creative enterprises ready to scale (Government of Australia, Department of Industry, Science and Resources, 2023).

The Export Market Development Grants (EMDG) scheme has complemented these efforts by reimbursing a portion of the expenses for creative MSMEs expanding into international markets. The grant has helped cover costs related to marketing, trade fairs and online promotion, supporting the global ambitions of Australian creators, especially in digital content and design (Australian Trade and Investment Commission [Austrade], 2023).

Australia's support system demonstrates several notable strengths: the integration of CCIs into broader innovation and commercialization agendas; the availability of co-funding mechanisms that reduce early-stage risk; and efforts to decentralize opportunities through regional initiatives. Additionally, the cultural reorientation signaled by the creation of Creative Australia suggests a renewed appreciation for the economic and social value of creative work.

However, key challenges remain. Support services for MSMEs in the creative sector remain fragmented across states and territories, complicating access for enterprises without grant-writing experience or networks within the public sector. Many funding schemes still rely on eligibility criteria rooted in STEM-based R&D, overlooking the distinct innovation logics of the cultural economy. Furthermore,

while regional development has become a priority, disparities persist in access to infrastructure, digital tools and business development services.

Australia demonstrates the value of embedding CCIs within wider innovation and regional development strategies. By strengthening cross-sector coordination, expanding support for creative clusters and recognizing the distinct growth trajectories of cultural enterprises, Australia can further consolidate its ecosystem for creative MSMEs.

5.1.2. **Canada**

Canada's support ecosystem for micro, small, and medium-sized enterprises (MSMEs) in the cultural and creative industries (CCIs) reflects a long-term policy vision grounded in inclusivity, innovation and global competitiveness. Since the early 2000s, the Canadian government has recognized the transformative potential of CCIs, gradually embedding them within domestic strategies for economic diversification and international trade. The 2008 global financial crisis prompted renewed attention to creative sectors as sources of resilience and employment, reinforcing their place within the federal policy framework. A turning point came in 2017 with the launch of the Innovation and Skills Plan, a comprehensive agenda that emphasized entrepreneurship, digital transformation and research collaboration across sectors. While broad in scope, this plan laid the foundation for CCIs to be included in Canada's innovation infrastructure through regional innovation hubs and industry-academic partnerships (Department of Finance Canada, 2017).

In 2018, the government unveiled the Creative Export Strategy, allocating CAD 125 million over five years to strengthen the international reach of Canadian creators. In 2023, the Strategy was renewed for another three years until 2026. The launch of the Creative Export Strategy

marked the federal government's commitment to supporting the export goals of CCIs and included targeted support for artistic craft, performing arts, design, audiovisual, visual art, interactive digital media, music, and publishing. The Creative Export Strategy includes the Creative Export Canada Program, which provides project-based funding to businesses with international potential. A percentage of the program's funding is dedicated to Indigenous Peoples and members of equity-deserving communities. (Canadian Heritage, 2023). The strategy also complements other federal funding contributors to creative industries in Canada, such as, the Canada Council for the Arts, Telefilm Canada, the Canada Media Fund, and the National Film Board, along with other creative industry-specific industrial support which include funding for export activities. The Strategy also includes support for trade missions and events, access to Global Affairs Canada's Trade Commissioner Service, and support and guidance through the Creative Export Navigator Service, which provides guidance and support for new and early-stage exporters. The strategy's implementation was further supported by Global Affairs Canada and the Trade Commissioner Service, illustrating Canada's whole-of-government commitment to CCI internationalization.

That same year, the Innovation Superclusters Initiative (now known as the Global Innovation Clusters program) reinforced the role of innovation ecosystems in Canada's growth strategy. Although not exclusive to CCIs,

this initiative funded industry-led consortia in fields such as artificial intelligence, advanced manufacturing, and digital technology. These consortia created opportunities for collaboration between creative enterprises, universities, and technology firms, particularly in areas like immersive media, interactive design and cultural data visualization (Innovation, Science and Economic Development Canada [ISED], 2023a). Such cross-sector partnerships helped position CCIs as contributors to Canada's broader innovation landscape, not just as artistic endeavors but as commercially viable and technologically dynamic fields.

Parallel efforts focused on strengthening financial access for creative MSMEs. The Canada Small Business Financing Program (CSBFP) facilitates access to loans for small enterprises with limited collateral, often a critical issue for creative entrepreneurs who lack tangible assets. Meanwhile, the Business Development Bank of Canada (BDC) has developed tailored financial products and advisory services for MSMEs, including those in the creative sector, with support for scaling operations, developing IP strategies and improving digital capabilities (Innovation, Science and Economic Development Canada, 2023b). The CanExport Program complements these efforts by offering internationalization grants that cover expenses related to market research, branding and translation, helping smaller creative firms expand into global markets.

Canada also distinguishes itself through its

commitment to gender equality and inclusive entrepreneurship. While not specifically targeted at CCIIs, the Government of Canada offers a suite of supports for entrepreneurs from equity-deserving groups, including the Women Entrepreneurship Strategy (WES), the Black Entrepreneurship Program (BEP), Futurpreneur, and the 2SLGBTQI+ Entrepreneurship Program. Launched in 2018, the Women Entrepreneurship Strategy (WES) represents a “whole-of-government” approach to increasing women-owned businesses’ access to the financing, networks and expertise they need to start-up, scale-up and expand into new markets. Since its launch, the WES has grown to over CAD 7 billion in investments. Business supports and financing are available for female entrepreneurs in CCIIs, who often face intersecting barriers in terms of access to finance, visibility and decision-making power (WES, 2023).

In 2020, the Canadian government announced its first-ever Black Entrepreneurship Program, aimed to help address the systemic barriers faced by Black business owners and entrepreneurs in starting and growing their businesses. The program was an investment of CAD 265 million over four years, including CAD 130 million from the Business Development Bank of Canada (BDC), to deliver tailored support services to Black entrepreneurs and business owners, including access to capital and ecosystem support services, and improving the quality and availability of data on Black entrepreneurship in Canada. For

youth, Futurpreneur Canada (FC) provides financing, mentorship and networking support to young entrepreneurs (aged 18-39) to help them launch new businesses and empower the next generation of Canadian entrepreneurs, including those in CCIIs. Since launching in 1996, FC has supported over 18,700 young entrepreneurs start more than 14,700 new businesses. The Government of Canada has committed an additional CAD 60 million in funding to FC over 5 years, starting in fiscal year 2024-25, to continue this work. As well, Canada provides support for 2SLGBTQI+ entrepreneurs through the 2SLGBTQI+ Entrepreneurship Program, including support with mentorship, export training and trade missions, supplier diversity certification and other activities delivered through ecosystem organization partners throughout Canada. The 2SLGBTQI+ Entrepreneurship Program was launched in 2023 with CAD 25 million in funding with the goal of improving capacity of the 2SLGBTQI+ entrepreneurship ecosystem to better support 2SLGBTQI+ entrepreneurs, including entrepreneurs working in CCIIs. These measures reinforce Canada’s broader equity agenda and acknowledge the role of CCIIs in enabling diverse economic participation.

At the regional level, the federal Regional Development Agencies (RDAs) play a pivotal role in adapting federal initiatives to local contexts, ensuring territorial equity and responsiveness. RDAs have supported the implementation of the Innovation and Skills Plan in ways that are sensitive to cultural

diversity and regional disparities. For instance, Northern and Indigenous communities have received targeted support to strengthen local creative ecosystems, from craft cooperatives to digital media labs. These efforts reflect a multi-layered governance model that combines domestic investment with regional flexibility, enhancing the impact and inclusiveness of public support mechanisms.

Despite these achievements, challenges remain. The complexity of navigating Canada's multi-program landscape can be daunting for early-stage creative entrepreneurs who lack dedicated administrative capacity. Many MSMEs report difficulties in understanding eligibility requirements or preparing successful applications, which can disadvantage smaller or community-based firms. Furthermore, although internationalization strategies have expanded, Canadian CCIIs continue to face obstacles in scaling beyond North American markets, particularly in Europe and Asia, due to high production costs and limited distribution networks.

Structural biases within innovation policy also persist. Many funding programs emphasize STEM-driven models of innovation, sidelining creative projects that do not fit neatly within technological paradigms. This creates barriers for hybrid or experimental ventures that combine artistic value with social or cultural impact. Additionally, there is limited availability of long-term funding instruments, making it difficult for creative enterprises to sustain growth beyond initial grant cycles.

In conclusion, Canada offers one of the most comprehensive models in the APEC region for integrating CCIIs into broader economic, innovation, and trade agendas. Its strengths include sustained public investment, cross-ministerial coordination, inclusive design

and regional adaptability. However, simplifying access to support, expanding market diversification strategies, and broadening the definition of innovation are critical steps to further strengthen the creative economy. By addressing these gaps, Canada can fully harness the potential of its cultural and creative entrepreneurs as drivers of inclusive and sustainable development.

5.1.3. Chile

Chile's evolution in supporting micro, small, and medium-sized enterprises (MSMEs) in the cultural and creative industries (CCIs) has followed a gradual, yet increasingly deliberate, trajectory. Historically, despite a strong institutional framework for trade and economic liberalization, CCIs remained peripheral to Chile's industrial development strategy, which traditionally prioritized sectors with high capital intensity and export performance. However, structural shifts, such as the expansion of the digital economy, changing labor market dynamics, and growing public demand for inclusive development, have progressively elevated the importance of CCIs in economy-wide policy agendas.

A major turning point came with the launch of the National Plan for the Promotion of the Creative Economy in 2017, which marked the first formal effort to recognize CCIs as strategic economic sectors. This was further institutionalized in 2020 through the National Culture Policy and the creation of the Creative Industries Development Fund. These milestones signaled a transition from fragmented interventions to a more coordinated policy framework aimed at fostering innovation, cultural identity, and export diversification. Government agencies such as CORFO, ProChile, and the Ministry of Cultures, Arts and Heritage have since expanded their roles to include sector-specific support for creative ventures.

Start-Up Chile, one of the economy's flagship programs launched in 2010, began to integrate creative enterprises, particularly in digital content, gaming, and audiovisual services, into its portfolio. Its focus on global scalability and entrepreneurial attraction helped position Chile as a hub for digital innovation, though the model remains more accessible to tech-driven initiatives than to community-based or experimental creative projects (Start-Up Chile, n.d.). CORFO's Seed Capital Programs and the Center for the Technological Revolution in Creative Industries (CRT+IC) further reinforced this direction by channeling investment toward creative clusters in areas such as music, design, and immersive media. These programs represent a growing recognition of the sector's commercial potential and alignment with domestic innovation goals.

Parallel efforts have targeted MSME formalization and technological adoption. The Small Business Support Programs by SERCOTEC have extended coverage to cultural entrepreneurs, especially in regional areas,



facilitating access to training, working capital, and digital tools. The Digitalize Your MSME initiative has played a key role in supporting digital transformation among small enterprises, helping in areas such as e-commerce, online marketing and digital payments (Economic Commission for Latin America and the Caribbean [ECLAC], 2021). Nevertheless, persistent gaps in connectivity and digital skills, particularly in rural and Indigenous communities, continue to limit the full reach of these initiatives.

On the financing front, credit guarantee mechanisms such as FOGAPE and FOGAIN have adapted their eligibility criteria to include micro and small creative enterprises. These programs address a fundamental barrier for many cultural entrepreneurs who struggle to access traditional banking services due to their informal status or lack of tangible collateral (World Bank, 2020). Meanwhile, the Small

Size Enterprise Division (DEMT) under the Ministry of Economy has advanced regulatory simplification for MSMEs, creating more enabling environments for small-scale creative ventures (Government of Chile, Ministry of Economy, n.d.).

Chile's internationalization efforts, led by ProChile, have gained traction through the Creative Economy Export Strategy, which provides targeted support for cultural goods and services. Trade missions, market intelligence and sector-specific training have enabled creative entrepreneurs to explore global opportunities, though access remains concentrated among medium-sized firms with export experience. The economy has also begun leveraging its extensive network of trade agreements and cultural diplomacy platforms to position Chilean CCIs in regional and global markets.

A notable area of progress has been

the gender lens applied to entrepreneurial development. Programs such as Women Entrepreneurs Program and Seed Capital for Women Entrepreneurs provide targeted support for women-led microenterprises, some of which operate in the creative sector. Although these initiatives are not exclusively designed for CCIs, they contribute to broader goals of gender equity in economic participation. However, the absence of disaggregated data by gender in many public programs hinders the ability to evaluate their impact within the creative economy specifically.

Despite these advances, challenges remain. Public support mechanisms often operate in silos, with limited integration between cultural, economic and territorial policy domains. Many programs are still centralized, overlooking the diverse needs and capacities of regional creative ecosystems. Informal and Indigenous creative enterprises continue to be underrepresented in funding instruments and private investment in CCIs remains scarce. Moreover, while digital transformation has been a core policy narrative, gaps in infrastructure and digital capabilities in underserved areas

continue to limit broader participation.

In conclusion, Chile has laid important groundwork for the development of a more integrated and strategic ecosystem for creative entrepreneurship. Its key strengths lie in the diversification of support tools, the incorporation of digital transformation agendas and the gradual mainstreaming of CCIs in export promotion and gender equality efforts. However, addressing fragmentation, deepening territorial decentralization and institutionalizing long-term financing instruments are essential next steps to fully unlock the potential of creative MSMEs across the economy.



5.1.4. China

China's strategic approach to integrating micro, small, and medium-sized enterprises (MSMEs) into the cultural and creative industries (CCIs) has evolved alongside its broader economic transition, from an export-oriented manufacturing model to one driven by innovation, services, and domestic consumption. This transformation accelerated after the 2008 global financial crisis, prompting the Chinese government to identify CCIs as a critical sector for stimulating internal demand, enhancing soft power and fostering technological advancement.

Within this context, the Made in China 2025 initiative, launched in 2015, marked a pivotal shift. It explicitly encouraged the integration of cultural content with technological innovation, enabling CCIs to access industrial development incentives and funding pipelines previously reserved for traditional manufacturing. This alignment of cultural development with local strategic goals laid the foundation for more systematic public investment in creative MSMEs.

Grassroots initiatives have also played a key role. The Maker in China Contest, launched in 2016 by the Ministry of Science and Technology, has become an economy-wide incubator for creative startups. With regional and local competitions, it offers mentorship, funding, and investor exposure for ventures in fashion, digital arts and cultural heritage. Its decentralized format has surfaced talent from outside primary urban centers, fostering more inclusive participation (Government of the Hong Kong Special Administrative Region, Digital Policy Office, 2024).

In the realm of financial access, the establishment of the National Financing Guarantee Fund in 2018 has expanded credit guarantees for MSMEs, including those in CCIs. Some provincial governments have piloted the integration of cultural valuation metrics into credit assessments, but implementation remains inconsistent across regions (People's Bank of China, 2023).



Despite these advances, several challenges persist. Fragmentation among programs, disparities between urban and rural regions and the lack of tailored mechanisms for informal or community-based creators continue to limit the reach and inclusivity of China's CCI policy framework (Liang & Wang, 2020). Moreover, coordination between cultural and industrial agencies is often limited, weakening the potential for integrated development strategies.

Nevertheless, China's experience demonstrates how strategic alignment of industrial policy, financial innovation, and soft power objectives can create enabling conditions for creative sector growth. Moving forward, strengthening institutional synergy and expanding access to underserved creative communities will be essential to sustain inclusive growth in the sector.

5.1.5. Indonesia

Indonesia's approach to strengthening micro, small, and medium-sized enterprises (MSMEs) in the cultural and creative industries (CCIs) has evolved through a gradual but determined government-led strategy. This trajectory gained momentum after the 2008 global financial crisis, which exposed the limitations of extractive growth models and motivated a policy shift toward more inclusive and innovation-driven sectors. Recognizing the demographic and geographic complexity of Indonesia, authorities identified the creative economy as a platform for both economic diversification and regional resilience.

A major turning point occurred in 2015 with the creation of BEKRAF (Badan Ekonomi Kreatif), the Creative Economy Agency, under the Office of the President. BEKRAF was tasked with coordinating public policies and investment across 16 creative sub-sectors, including design, culinary arts, architecture and digital content. It played a central role in ecosystem-building, especially for small producers and digital creatives. Although BEKRAF was later merged into the Ministry of Tourism and Creative Economy in 2019, its legacy remains visible in the institutional frameworks that support CCIs to this day (United Nations Educational, Scientific and Cultural Organization [UNESCO], n.d.).

Among BEKRAF's most notable contributions was the launch of the Indonesia Startup Ecosystem (Program 1000 Startups Digital) in 2016. Designed as a multi-stage incubator and mentoring initiative, the program aimed to create a pipeline for digital entrepreneurs, many of whom operate in creative services such as gaming, e-commerce, and fintech. Supported by local governments and universities, this initiative facilitated scalable business development beyond Java and Sumatra, although challenges persist in connecting early incubation with long-term financing (Government of Indonesia, Ministry of Communication and Information Technology., 2016).

In parallel, Indonesia invested in improving access to finance for creative enterprises. The Revolving Fund Management Agency (LPDB), under the Ministry of Cooperatives and SMEs, developed flexible loan schemes for MSMEs in cultural sectors. These included innovative partnerships with digital platforms to enhance borrower targeting and monitoring. Nevertheless, informal businesses still face high entry barriers

due to documentation requirements and legal status constraints (ANTARA News, 2022).

To further close financing gaps, the Ultra Micro Financing Program (UMi), launched in 2017, targeted unbanked entrepreneurs, especially women-led microenterprises engaged in crafts, textiles, and culinary traditions. Delivered via peer-lending institutions, UMi offered a more accessible model with high repayment rates. However, its scalability has been limited by administrative fragmentation among lending

partners (Women's World Banking, 2022).

Indonesia also prioritized digitalization through a MSME Digitalization Program, operational since 2020. This initiative has supported business formalization, promoted the use of online payment systems and facilitated integration into e-commerce platforms. It achieved measurable progress in urban centers, but rural outreach and digital literacy gaps continue to hinder full inclusion (ANTARA News, 2023).



Institutional efforts have also focused on data and strategy alignment. BEKRAF and its successors have led sector mapping exercises and linked creative economic policy with the Sustainable Development Goals (SDGs), reinforcing the sector's value beyond economic terms. However, coordination between ministries remains a key challenge. Mandate overlaps and fragmented program implementation have prevented the emergence of a coherent economy-wide strategy for CCIs (BPS-Statistics Indonesia, 2024).

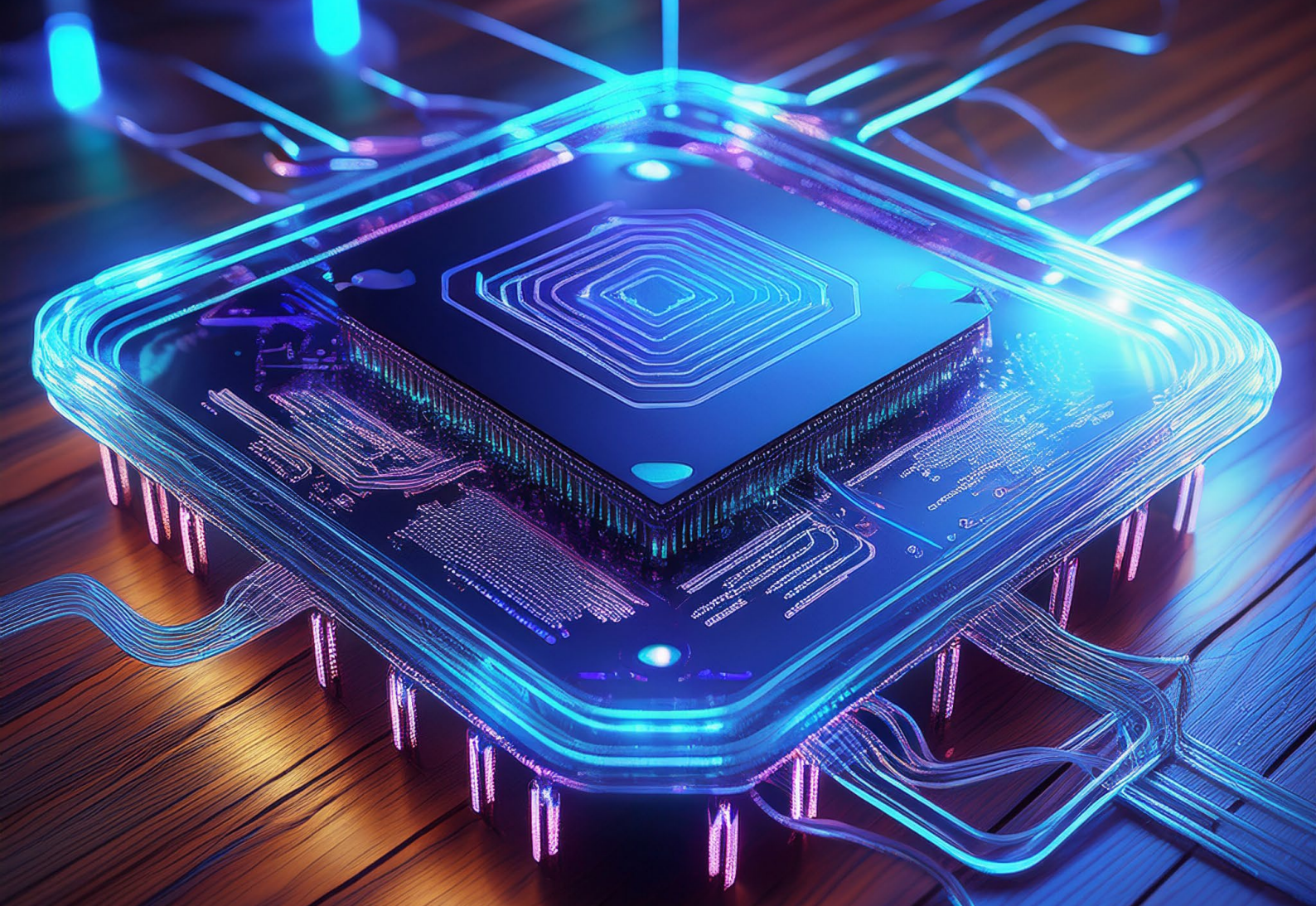
Despite these structural barriers, Indonesia has demonstrated strength in promoting early policy recognition, fostering microfinance innovation and supporting digital startups. Its approach to decentralized incubation and support for women-led enterprises has laid a strong foundation for inclusive creative development. Moving forward, the consolidation of institutional coordination, extension of support beyond major urban areas and formalization pathways for community-based creative ventures will be crucial to ensure the long-term sustainability and equity of the creative ecosystem.

5.1.6. **Korea**

Over the past two decades, Korea has emerged as a global leader in harnessing cultural and creative industries (CCIs) to drive economic growth, global soft power and technological innovation. This transformation reflects a long-term institutional strategy that has positioned CCIs not only as cultural assets but as high-potential engines for entrepreneurship, export competitiveness and digital leadership. Anchored in robust public-private partnerships and a consistent vision for innovation, Korea's ecosystem has prioritized MSME integration through dedicated funding, infrastructure and internationalization mechanisms.

Early momentum was generated in the 2000s through cultural policy reforms and the recognition of the content industry as a strategic export sector. The Creative Economy Strategy, introduced in 2013, became a defining policy moment. It conceptualized creativity as a bridge between culture, technology and enterprise, leading to the establishment of Centers for Creative Economy and Innovation (CCEIs) across the economy (Government of Korea, Ministry of Strategy and Finance, 2013). These hubs offered incubation, mentoring and funding access for creative MSMEs, particularly those operating in gaming, animation and audiovisual media, catalyzing a new wave of startups and collaborative ventures.

This ecosystem was significantly reinforced in 2017 with the creation of the Ministry of SMEs and Startups (MSS), which centralized support for small enterprises and launched flagship programs to support scalable innovation. Among these, the Tech Incubator Program for Startups (TIPS) became a cornerstone. TIPS operationalized a co-investment model that matched public R&D funding with private venture capital, focusing on high-potential enterprises, including those in digital arts and cultural technologies (Government of the Republic of Korea, Ministry of SMEs and Startups, 2023a). Its success has positioned it as a regional benchmark,



demonstrating how blended finance can reduce risk and amplify the scalability of creative MSMEs.

In parallel, the Korea Creative Content Agency (KOCCA) expanded its support infrastructure. Through initiatives like the Content Korea Lab, KOCCA enabled access to technical training, prototyping equipment and market-testing platforms across different regions (Korea Creative Content Agency, n.d.). This decentralization has been key in ensuring that creative entrepreneurship extends beyond Seoul, allowing talent from secondary cities to participate in the innovative economy. KOCCA also manages grant programs for content production in areas such as music, animation and immersive media, further reinforcing Korea's global footprint in digital content.

Financial accessibility has been bolstered by institutions like the Korea Venture Investment Corporation (KVIC) and the Korea Technology Finance Corporation (KIBO). KVIC manages venture funds that prioritize creative and tech-oriented startups, while KIBO provides credit guarantees based on intangible assets, including IP portfolios and content valuation (Gompers & Chan, 2024; Kim et al., 2021). These tools respond to the structural financing constraints of the creative economy and reflect a mature understanding of how value is created and captured in CCI ventures.

The launch of the Super-Gap Startup 1000+ Project in 2022 illustrated

Korea's ambition to produce globally disruptive startups in sectors such as design, fashion-tech, and entertainment technologies. The initiative created a dedicated stream for creative enterprises and targeted super-gap technologies capable of reshaping entire markets (Government of the Republic of Korea, Ministry of SMEs and Startups, 2023b). Yet, stringent eligibility criteria have made access challenging for informal or early-stage ventures. Similarly, Korea's K-Startup Grand Challenge, initiated in 2016 as a soft-landing program for foreign startups, has contributed to international tech transfer and global visibility for Korean creative firms, albeit with a primary focus on high-growth models (Ohr, 2016).

Complementary initiatives such as the Smart Factory Initiative and the Hope Return Package, though not designed exclusively for CCIs, have indirectly supported creative MSMEs by offering digital integration tools and re-entrepreneurship support. These horizontal programs reflect Korea's broader approach to embedding creativity within local industrial modernization and labor reintegration strategies.

Collectively, Korea's institutional architecture stands out for its coherence, specialization, and technological sophistication. It offers one of the most advanced ecosystems in the APEC region for nurturing creative MSMEs, integrating financial support, incubation, talent development, and global scaling. However, certain challenges remain. The ecosystem remains concentrated around high-tech, export-

driven ventures, often sidelining informal, experimental, or community-based creative enterprises. Program access remains uneven across regions and while impact metrics are abundant, they remain skewed toward output indicators such as number of grants or projects funded, rather than long-term outcomes in employment, inclusion, or sustainability.

To fully realize the inclusive potential of its creative economy, Korea will need to invest in more diverse support mechanisms that acknowledge the heterogeneity of creative enterprises, strengthen regional outreach and improve impact assessment frameworks that go beyond commercial metrics. Nonetheless, its achievements in institutional coordination, technological integration and creative export promotion offer a powerful model for other APEC economies seeking to build globally competitive and innovation-driven cultural industries.



5.1.7. Mexico

Mexico's engagement with the cultural and creative industries (CCIs) has transitioned over the past two decades from a focus on heritage preservation and social development to a more structured recognition of these industries as strategic economic drivers. Historically, Mexico's industrial and trade policies emphasized large-scale manufacturing and export integration, especially under NAFTA and later the United States-Mexico-Canada Agreement (USMCA). However, by the early 2010s, growing international interest in the orange economy and the emergence of creative clusters across major urban centers prompted the government to begin articulating tailored instruments for micro, small and medium-sized enterprises (MSMEs) in the CCI sector (Valdivia, Quintana Romero, & Mendoza González, 2022).

A pivotal moment occurred in 2013 with the establishment of the National Institute of the Entrepreneur (INADEM), a federal agency designed to foster entrepreneurship and innovation across the economy. INADEM played a central role in supporting creative MSMEs through financial programs, mentoring and digital capacity-building, offering a gateway for many cultural entrepreneurs to access public support systems for the first time (Government of Mexico, Secretariat of Economy, 2016). Incubators, accelerators and public-private partnerships created under its leadership provided momentum for creative startups to integrate into broader economic frameworks. While INADEM was dissolved

in 2019 due to shifting political priorities and budget constraints, its institutional legacy remains visible in the design of subsequent programs and policies.

In response to the institutional vacuum left by INADEMs closure, the government introduced the 2020–2024 Sectoral Economy Program (PROSECO), a more decentralized strategy aimed at supporting MSMEs across diverse sectors. PROSECO explicitly includes CCIs in its framework, promoting financial inclusion, regional development and innovation (Government of Mexico, Secretariat of Economy, 2020). Nonetheless, uneven adoption across local governments has led to disparities in program implementation, with creative entrepreneurs in rural and Indigenous communities often facing challenges in accessing support mechanisms.

Several targeted financial tools have complemented PROSECO's broader agenda. The Fondo PyME and various Microfinance Institutions (MFIs) have played a critical role in extending capital to underserved groups, including artisans and traditional creatives operating in the informal sector (Organisation for Economic Cooperation and Development [OECD], 2008). In addition, the Women's Entrepreneurial Development Fund, introduced in 2019, offers tailored financing, mentoring and training for women-led enterprises, helping to reduce structural barriers in a historically male-dominated entrepreneurial landscape.

Mexico's digital transformation initiatives have significantly influenced the evolution

of policies supporting cultural and creative industries (CCIs). Programs such as the National Digital Strategy 2021–2024 aim to bridge the digital divide by providing small businesses with tools for online visibility and new business models. These efforts are particularly pertinent for creative entrepreneurs adapting traditional products for digital markets. However, challenges persist, especially in rural and Indigenous communities, where digital literacy and infrastructure access remain limited (Government of Mexico, 2021).

Although mentorship networks for creative enterprises exist, they remain largely informal and uncoordinated. Unlike some other APEC economies, Mexico has not yet developed a robust institutional framework for entrepreneurial recycling. Still, former INADEM-supported networks continue to serve as entry points for new creative startups and civil society organizations play an increasing role in offering guidance and capacity-building for emerging entrepreneurs.

Internationalization has been addressed through digital tools and limited export promotion activities, but creative MSMEs still face structural obstacles to scaling globally. These include inadequate support for navigating complex regulatory environments, particularly in areas like intellectual property and digital trade and limited access to global distribution channels.

Overall, Mexico presents a mixed policy landscape. The economy has laid important groundwork through longstanding cultural

institutions like FONCA and bold policy experiments like INADEM. More recent efforts such as PROSECO and the Women's Entrepreneurial Development Fund illustrate a continued willingness to include CCIs in broader economic development frameworks. However, fragmentation across federal and local institutions, short-lived reforms and the absence of a specialized economy-level strategy for creative industries continue to limit the sector's growth potential. Going forward, policy efforts must prioritize restoring domestic coordination, investing in gender-responsive and digital infrastructure and building institutional mechanisms that reflect the unique dynamics of creative entrepreneurship across Mexico's diverse regions.

5.1.8. Peru

Peru's evolving approach to supporting micro, small, and medium-sized enterprises (MSMEs) in the cultural and creative industries (CCIs) reflects a gradual but determined transition from reactive policy interventions to more structured development frameworks. This shift gained relevance following the 2008 global financial crisis and became more pronounced during the 2014–2016 period of economic deceleration, which exposed the vulnerabilities of Peru's traditional, extractive-based economic model. These external pressures catalyzed interest in diversifying the economy and leveraging CCIs as engines of inclusive growth, employment, and innovation.

A pivotal step came with the creation of dedicated financial support programs for MSMEs, many of which were adapted to meet the needs of creative entrepreneurs. The Business Support Fund for Micro and Small Enterprises (FAE MYPE), introduced in the aftermath of the pandemic, played a critical role in guaranteeing loans through the formal banking system (Government of Peru, Ministry of Economy and Finance, n.d.). This was followed in 2021 by the launch of the Business Support Program for Micro and Small Enterprises (PAE MYPE), which offered

subsidized working capital to help micro and small enterprises recover from the economic shocks of COVID-19 (Development Finance Corporation [COFIDE], 2021). Both programs, while not exclusive to the creative sector, extended much-needed liquidity to cultural entrepreneurs operating at the margins of formal financial systems.

Parallel to these emergency-driven mechanisms, Peru began laying the foundations for a more innovation-oriented ecosystem. A major milestone in this direction was the development of Innovate Peru Program, later absorbed into ProInnovate, the Peruvian innovation agency. Through competitive grants and technical assistance, this initiative provided support for projects in digital content, audiovisual production, and creative entrepreneurship, helping to bridge

the financing gap for startups in the cultural sector that often lack collateral or access to traditional credit (Government of Peru, Ministry of Production, n.d.a). In 2014, the introduction of Startup Perú further contributed to the formation of an entrepreneurial ecosystem that increasingly includes digital creatives, designers and gaming ventures, particularly among younger demographics (Government of Peru, Ministry of Production, n.d.b)

The cultural policy landscape also evolved during this period. In 2017, the Ministry of Culture launched the Política Nacional de Cultura, which was later updated in 2020 with a long-term vision toward 2030. This policy framework positioned CCIs as key drivers of domestic development, emphasizing their contributions to social inclusion, heritage preservation and regional economic revitalization (Government



of Peru, Ministry of Culture, 2020). However, the integration of cultural policy into broader economic planning remains limited, and institutional coordination between ministries continues to be fragmented.

To support productive diversification, the National Productive Diversification Program (PNDP), spearheaded by the Ministry of Production, incorporated cultural and creative enterprises into its agenda. The PNDP encourages value-added production through industrial design, creative business models, and regional development strategies (Government of Peru, Ministry of Production, 2014). Complementing this approach, the MyPeru Boost Program, launched in 2023, focuses on integrating microenterprises into formal value chains and enhancing their technological capabilities through credit instruments adapted to low-income and informal entrepreneurs, many of whom operate in cultural sectors such as crafts and traditional gastronomy (Government of Peru, n.d.).

Despite these advances, structural challenges persist. Most programs remain short-term or emergency-driven, lacking a stable institutional framework that ensures continuity and coherence across political cycles. Informality is widespread among creative MSMEs, particularly in rural and Indigenous communities, limiting the reach and impact of existing tools. Additionally, internationalization remains an underdeveloped dimension. While agencies like ProPeru have taken steps to promote cultural exports, there is still a lack of targeted tools to support the global expansion of creative firms.

Nevertheless, Peru's growing policy interest in CCIs signals a broader commitment to reposition the creative economy within local development strategies. The inclusion of cultural industries in innovation, finance and diversification agendas illustrates a shift toward recognizing their economic potential. Moving forward, Peru's ability to institutionalize these advances and create synergies between cultural and economic policy will be essential. Addressing coordination gaps, supporting creative entrepreneurs in the informal sector and strengthening export readiness will be key to unlocking the sector's full contribution to inclusive and sustainable development.

5.1.9. Singapore

Singapore has undergone a remarkable transformation in its approach to supporting micro, small, and medium-sized enterprises (MSMEs), positioning itself as a regional leader in digital innovation, financial facilitation, and cultural entrepreneurship. Over the past two decades, the government has advanced a highly coordinated and forward-looking institutional framework that not only fosters digital integration but also incorporates cultural and creative industries (CCIs) as engines of domestic growth and global competitiveness.

This evolution was catalyzed in 2014 with the launch of the Smart Nation Initiative, a whole-of-government strategy designed to build a digitally enabled society and economy. The initiative provided the digital infrastructure and policy foundation for MSMEs to adopt transformative technologies such as artificial intelligence, big data, and the Internet of Things, tools that have been increasingly leveraged by creative enterprises to expand content production and reach (Government of Singapore, Smart Nation and Digital Government Office, 2018). Building on this infrastructure, the government introduced in 2017 the GoBusiness platforms, including the e-Adviser and GoBusiness Licensing, which helped streamline access to support services and regulatory processes. These platforms were particularly impactful for creative enterprises navigating complex licensing, intellectual property management, and content distribution requirements (Government of Singapore, Smart Nation and Digital Government Office, 2021).

That same year, the SMEs Go Digital Programme was launched to accelerate digital adoption among smaller firms. For creative MSMEs, the program enabled the uptake of multimedia tools, digital storytelling platforms, and e-commerce capabilities, establishing a foundation for innovation and market expansion. In parallel, the Startup SG Programmes, particularly the Startup SG Founder and Startup SG Women initiatives, provided seed funding, mentorship, and ecosystem integration for early-stage ventures, with a strong focus on reducing gender gaps in entrepreneurship and supporting underrepresented founders in the creative economy (Enterprise Singapore, n.d.a).

By 2018, Singapore deepened its financial and technological support through the introduction of the Enterprise Development Grant

(EDG) and the Productivity Solutions Grant (PSG). The EDG supported innovation and internationalization efforts in areas such as digital media and content services, while the PSG offered co-funding for digital tools that enhanced productivity and creative output (Enterprise Singapore, n.d.b). These programs were instrumental in reducing the financial risk associated with digital transformation, particularly for creative MSMEs seeking to scale.

This trajectory was reinforced in 2019 with the launch of the PACT Programme, which fostered collaboration between MSMEs and larger firms to co-develop products and services (Enterprise Singapore, 2024). For the creative economy, this opened space for partnerships in content production, interactive media, and design. In 2020, the Enterprise Leadership for Transformation (ELT) Programme was introduced to enhance strategic leadership capabilities among business owners, including those in the arts and creative sectors, while the Global Ready Talent (GRT) Programme facilitated the recruitment of professionals with international expertise in digital media and global markets (Enterprise Singapore, n.d.c; n.d.d). Complementing these efforts, the SkillsFuture Enterprise Credit (SFEC) provided financial incentives for training programs in content technologies and digital marketing—skills vital to the competitiveness of creative MSMEs in a digital-first landscape (SkillsFuture Singapore, n.d.).

In 2023, Singapore strengthened its financial

support ecosystem with a renewed Enterprise Financing Scheme (EFS), which expanded access to venture debt, trade financing, and growth capital for creative enterprises. This marked an important step toward addressing long-standing financing barriers for MSMEs built around intangible assets and non-linear revenue models. Most significantly, the launch of the Our SG Arts Plan (2023–2027) marked a culmination of Singapore’s integration of cultural development and economic strategy. The plan positioned CCIs as a core pillar of the domestic agenda, supporting talent development, cross-sector collaboration, and international visibility for creative enterprises, while promoting inclusive participation across gender, ethnicity, and socio-economic background (Government of Singapore, National Arts Council, 2023).

Together, these programs reflect Singapore’s strength in constructing an interconnected ecosystem that supports MSMEs across the entire creative business lifecycle. Digital readiness is promoted through foundational infrastructure and programmatic interventions; inclusive entrepreneurship is advanced via targeted streams for women and early-stage creators; innovation is incentivized through co-funding models and public-private partnerships; internationalization is supported with grants and workforce mobility tools; and regulatory complexity is minimized through unified digital platforms. Importantly, the cultural sector is no longer seen as peripheral but as integral to Singapore’s broader development strategy.

Nonetheless, challenges remain. The incubation and acceleration space for creative MSMEs is still relatively underdeveloped compared to more technology-centric ventures, and while digital transformation tools are widely available, sector-specific regulatory platforms tailored to CCIs are lacking. Moreover, measuring the social and cultural value generated by these enterprises continues to be a complex task. Addressing these limitations, through more specialized support for creative innovation, expanded co-working and incubation spaces, and improved impact metrics, will be essential to fully unlocking the potential of Singapore's creative economy and maintaining its position as a model for digitally integrated, inclusive enterprise development across the APEC region.

5.1.10. **Thailand**

Thailand's approach to integrating micro, small, and medium-sized enterprises (MSMEs) into the cultural and creative industries (CCIs) reflects a deliberate effort to leverage its rich cultural heritage, longstanding tourism sector and growing innovation capabilities. While CCIs were historically seen as peripheral to the economy, a pivotal shift occurred in the late 2010s when the government began treating the creative economy as a strategic engine for long-term development. This evolution culminated in a set of institutional reforms and targeted programs designed to overcome structural constraints, particularly in access to finance, territorial inequality and the professionalization of creative ventures.



The turning point came in 2016 with the adoption of Thailand 4.0, a strategy to transition the economy toward value-based growth, focused on knowledge, innovation and digital transformation (Government of Thailand, Board of Investment, n.d.). Within this framework, CCIs were designated among the ten "S-Curve industries" critical to future competitiveness. This designation created political momentum to establish specialized agencies and redirect public investment toward creative sectors. A key milestone was the creation of the Creative Economy Agency (CEA) in 2018, which assumed a technical and coordinating role across ministries, regional governments, and private stakeholders (Government of Thailand, Creative Economy Agency, n.d.a). Its mandate included promoting creative clusters, enabling policy coherence and providing strategic support to MSMEs in design, digital content, handicrafts, and cultural tourism.

One of the agency's early interventions was the establishment of the Creative Industries Development Fund (CIDF), which provided grants and soft loans adapted to the characteristics of creative enterprises, such as reliance on intangible assets and irregular production cycles. The CIDF filled a significant financing gap for design-driven businesses, although its commercially oriented criteria tended to exclude more experimental or community-based proposals (Government of Thailand, Creative Economy Agency, n.d.b). In parallel, Thailand developed risk-sharing mechanisms to address structural

barriers in credit access. The Thai Credit Guarantee Corporation (TCG) introduced tailored guarantees for creative MSMEs in 2020, reducing perceived risk among banks and encouraging formalization (Thai Credit Guarantee Corporation, 2020). However, limited technical assistance and follow-up services hindered the guarantees' long-term effectiveness, particularly for informal and early-stage entrepreneurs.

Efforts to expand territorial outreach were reinforced through the SMEs One-Stop Service Centers (OSS), launched by the Office of Small and Medium Enterprise Promotion (OSMEP) in 2020 (World Bank, 2023). These centers operate as regional platforms offering digital marketing support, e-commerce tools, and capacity-building workshops for creative firms, especially in cities like Chiang Mai and Khon Kaen. By decentralizing services, the OSS model responded to longstanding disparities between Bangkok and the provinces. Nonetheless, persistent gaps in internet connectivity and digital infrastructure continue to restrict access in rural regions, limiting the full impact of the initiative.

Complementing these services, the SME Development Fund, managed by the Ministry of Industry, offered additional financial support to early-stage companies in strategic sectors such as fashion, audiovisual media and product design. Despite its relevance, weak coordination between this fund and the CIDF resulted in overlapping eligibility criteria and procedural redundancies, diminishing overall

efficiency and coverage. Recognizing the need for technical services, OSMEP launched the Business Development Service (BDS) Voucher Scheme in 2021, which subsidized access to legal, branding, intellectual property and marketing expertise (Suzuki & Igei, 2017). This initiative contributed to the professionalization of small creative firms, but its scalability and sustained impact remain difficult to evaluate due to a lack of outcome-based monitoring systems.

In 2023, the CEA launched Ignite Thailand, an ambitious initiative aimed at transforming the economy into a regional creative hub by attracting investment, expanding international networks and supporting creative city projects (Government of Thailand, Ministry of Foreign Affairs, 2023). This campaign built upon the institutional progress of the past five years but highlighted the growing need for better metrics, sectoral data and impact tracking to guide public investments and demonstrate long-term value generation in the creative economy.

Taken together, Thailand has constructed a foundational ecosystem that prioritizes institutional coordination, regional inclusion and tailored financial tools for creative MSMEs. The presence of a dedicated agency, the development of sector-sensitive funding instruments and the expansion of regional service centers illustrate the government's evolving commitment to inclusive creative growth. However, key challenges persist in ensuring programmatic coherence between overlapping funds, increasing technical

support for informal entrepreneurs, and measuring impacts beyond short-term outputs. Strengthening cross-agency coordination, expanding rural connectivity and embedding long-term evaluation mechanisms will be crucial to consolidating Thailand's progress and securing the resilience of its creative MSMEs across the APEC region.

Finally, the following ten case studies illustrate how economies have translated shared challenges, such as financing constraints, institutional fragmentation, digital exclusion, and gender inequality, into differentiated strategies. These cases offer replicable tools and insights, grounded in five interrelated dimensions: institutional coordination, financial innovation, digital transformation, inclusive policy design, and internationalization. Together, they reflect a growing consensus on the need to position CCIs as central to sustainable and innovation-driven development.

5.2 Interviews on Practical Tools and Strategies for the Creative Economy

This section builds on the ten case studies presented earlier by integrating expert insights derived from in-depth interviews with five policy specialists from both APEC and non-APEC economies. These interviews, previously outlined in the methodology section, provide grounded perspectives on the challenges and enable shaping cultural and creative industries (CCIs), particularly in relation to micro, small, and medium-sized enterprises (MSMEs). Structured around six practical tools identified through comparative case analysis, this section articulates cross-cutting lessons based on institutional trajectories and the lived experiences of those designing and implementing CCI-related policy.

5.2.1. Defining Cultural and Creative Industries (CCIs)

The conceptual boundaries of cultural and creative industries (CCIs) remain fluid across APEC economies, shaped by divergent institutional trajectories, sectoral priorities, and epistemological frames. While the UNESCO classification remains a common reference, interpretations of what constitutes a creative enterprise vary significantly, affecting policy design, data collection and access to support mechanisms. This definitional ambiguity has material consequences for micro, small and medium-sized enterprises (MSMEs), especially those operating at the margins of formality or outside traditional cultural domains.

As several interviewees noted, definitions are not neutral, they reflect the political and institutional priorities of each context. For Felipe Buitrago, former Minister of Culture and expert in the orange economy, “The definition of creative industries is not just academic; it determines whether an entrepreneur qualifies for a grant, whether a community project can scale, or whether a business is seen as cultural or commercial” (personal communication, 12 March 2025). This underscores the importance of not only clarifying definitions but also aligning them with the structural realities of creative production.

Korea’s experience illustrates the advantages of a broad and strategic framework. The integration of CCIs into the Creative Economy Strategy allowed Korea to treat design, audiovisual media, and content creation as core sectors for export, innovation and digital development. This expansive vision enabled institutions like KOCCA to fund both commercial content producers and experimental creators, blurring traditional boundaries between industry and culture. Similarly, Singapore’s Our SG Arts Plan (2023–2027) embraces a holistic vision that includes cultural heritage, digital media, and socially engaged arts under a unified framework, positioning CCIs not as a niche, but as a pillar of economy competitiveness and social inclusion.

In contrast, narrower definitions can limit the reach and impact of public policy. In Peru, the absence of a shared local definition of CCIs has fragmented support. While programs such as ProInnovate and Startup Peru have included digital content and design entrepreneurs, cultural policy remains anchored in heritage and arts, creating a disconnect. As Carlos Lara pointed out, “We still operate with parallel definitions: one



economic, one cultural. And the ones who get lost in the middle are the small entrepreneurs trying to innovate in both worlds” (personal communication, 5 March 2025).

Indonesia offers a different perspective, where early leadership under BEKRAF emphasized a culturally grounded definition of CCIs that included culinary arts, crafts and fashion as key sectors. Dwinita Larasati emphasized the relevance of this approach: “For us, the creative economy was always about people first, small producers, traditional knowledge, everyday creativity. That’s why BEKRAF didn’t start with software, it started with batik” (personal communication, 6 March 2025). However, she also warned that this community-centered view became harder to sustain after the agency’s merger, as tourism agendas took precedence over bottom-up cultural innovation.

In Australia and Canada, the trend has been toward increasingly inclusive and dynamic definitions that respond to evolving technologies and business models. Canada’s

Creative Export Strategy explicitly includes immersive media, interactive storytelling and Indigenous-led projects, while Australia’s rebranding of the Australia Council for the Arts into Creative Australia reflects an institutional shift from a subsidy logic to an entrepreneurial vision. Still, as Trinidad Zaldívar observed, “Even in places with good definitions, there’s a need to constantly update them. TikTok wasn’t a sector ten years ago, today, it’s a platform for whole creative ecosystems” (personal communication, 6 March 2025).

Ultimately, definitional clarity is not about narrowing the field, it is about building shared recognition of the diversity and value of creative work. A flexible yet grounded definition of CCIs enables more inclusive policies, better data systems and more equitable access to resources. For MSMEs, it means legitimacy, visibility, and the possibility of being counted, not just as cultural actors or entrepreneurs, but as essential contributors to sustainable development.

5.2.2. Policy Coherence and Governance Models

Across the APEC region, the design and implementation of policies for micro, small and medium-sized enterprises (MSMEs) in the cultural and creative industries (CCIs) strongly reflect the degree of institutional coherence and long-term governance vision present within each economy. Effective governance frameworks are those that not only recognize CCIs as strategic sectors but also articulate their development within broader innovation, trade and inclusion agendas. The cases analyzed demonstrate a range of institutional configurations, from centralized coordination to fragmented ecosystems, underscoring the importance of leadership, inter-agency collaboration, and specialized technical bodies.

Korea offers a benchmark example of institutional coordination. The Ministry of SMEs and Startups (MSS), the Korea Creative Content Agency (KOCCA), and the Korea Venture Investment Corporation (KVIC) operate under a shared vision that integrates culture, innovation and entrepreneurship. This institutional alignment allows creative enterprises to access tailored financing, incubation and export support under a cohesive local strategy. Similarly, Thailand has made important progress through the establishment of the Creative Economy Agency (CEA), which acts as a technical and coordinating hub for initiatives such as the Creative Industries Development Fund (CIDF) and Ignite Thailand.

In contrast, Indonesia and Peru illustrate the consequences of institutional fragmentation. In Indonesia, the early leadership of BEKRAF gave way to diluted coordination following its merger with the Ministry of Tourism and Creative Economy. Peru, despite having developed diverse instruments such as ProInnovate, PAE MYPE, and Impulso MyPeru, still faces significant gaps in coordination between cultural, production and innovation agencies. As emphasized by Felipe Buitrago, “fragmented ecosystems create duplicated efforts and prevent smaller creative businesses from knowing where to go or how to benefit from support systems” (personal communication, 12 March 2025).

Interviewees repeatedly pointed to the value of interministerial coordination bodies or specialized agencies to consolidate technical expertise and ensure that CCI-related interventions are not sidelined. Carlos Lara noted that “many of our economies have institutional frameworks that don't talk to each other. The ministry of economy goes

in one direction, culture goes in another and so do the ministries of labor or innovation” (personal communication, 5 March 2025). This institutional disconnection often results in programs that are short-lived, redundant, or misaligned with the real needs of creative MSMEs.

For Trinidad Zaldívar, effective governance begins with a paradigm shift: “The first challenge is to stop seeing the cultural sector only as a cost. Once you recognize it as a generator of employment, identity, and innovation, you can build a cross-cutting agenda” (personal communication, 17 March 2025). In this context, planning instruments and public policies must not only be aligned vertically, from economy-wide to local, but also horizontally, across different sectors. This requires long-term political will, multi-stakeholder platforms and robust data systems to inform decision-making.

Chile’s case offers a relevant lesson in this regard. Although it has taken important steps, such as creating the Creative Industries Development Fund and the National Plan for the Promotion of the Creative Economy, these efforts remain constrained by limited integration between cultural, economic, and territorial policy domains. Carolina Pereira remarked that “it’s not just about promoting culture; it’s about ensuring that culture is embedded in our industrial and innovation agendas. That requires coordinated institutions, shared language, and clear mandates” (personal communication, 5 March 2025).

Ultimately, the sustainability and impact of support for creative MSMEs depend on strong governance models. These must prioritize coordination across agencies, institutional specialization, and the creation of enabling environments where the cultural economy is treated not as an exception, but as a core component of domestic development strategies.

5.2.3. Targeted Digital and Technological Support for the MSME Sector

Digital transformation has become a foundational strategy for MSME competitiveness in the cultural and creative industries (CCIs), as it enables broader market access, cost efficiency, content innovation and international exposure. Economies across APEC have deployed a range of digital and technological tools, some integrated within domestic innovation strategies, others designed specifically for creative enterprises. The effectiveness of these interventions depends on the degree to which they address structural barriers such as digital literacy, infrastructure deficits and sector-specific technological needs.

Singapore has set a regional benchmark through its Smart Nation initiative and complementary programs like SMEs Go Digital, which provides sector-specific digital solutions for creative MSMEs, including multimedia platforms, e-commerce integration and digital storytelling tools. These are complemented by the GoBusiness e-Adviser and GoBusiness Licensing systems, which simplify access to regulatory and administrative services for digital enterprises. This ecosystem allows creative entrepreneurs to navigate the complex interface between content creation and technological compliance more efficiently.

Australia offers another strong model through the Business Research and Innovation Initiative (BRII) and the Entrepreneurs' Programme, which have enabled creative tech enterprises to co-design digital solutions alongside public institutions. This cross-sectoral collaboration has helped position creativity as a driver of public innovation, particularly in areas such as cultural heritage, visualization and immersive media.

Several economies have also prioritized regional inclusion through digitalization. In Thailand, the establishment of SME One-Stop Service (OSS) Centers and support from the Creative Economy Agency (CEA) aim to decentralize access to digital infrastructure and services. However, gaps persist in rural connectivity and digital readiness, a concern echoed across interviews. Dwinita Larasati, reflecting on Indonesia's digital strategy, emphasized that "if we don't fix the connectivity in smaller towns, then our programs only reach the top layer of creative entrepreneurs" (personal communication, 6 March 2025).

China and Korea have embedded digital creativity within their industrial modernization strategies. China's Maker in China Contest has emerged

as a domestic incubator for creative startups, offering mentorship and exposure to digital tools. Korea's Content Korea Labs, managed by KOCCA, combines technical training, prototyping equipment, and market access platforms, extending digital opportunities beyond Seoul into secondary regions. These efforts demonstrate how decentralization can amplify impact by integrating digital transformation with talent development.

Interviewees stressed the importance of designing digital tools that reflect the actual production cycles and innovation logics of CCIs. As Trinidad Zaldívar explained, “you can't just take a digital transformation model built for manufacturing and drop it into the creative sector. It doesn't work. You need sector-sensitive infrastructure and policy” (personal communication, 17 March 2025). This nuance is often overlooked, particularly in economies where digital strategies prioritize STEM-based industries.



Carolina Pereira similarly warned against adopting overly generalized digital policies: “When we speak of digitalization, we need to distinguish between technological capacity and strategic use. A filmmaker in rural Chile doesn’t need the same platform as a gaming startup in Santiago” (personal communication, 5 March 2025). Her observation highlights the need to tailor digital tools to the diversity of creative practices, rather than imposing one-size-fits-all approaches.

Despite these advances, implementation challenges remain. Many digital initiatives lack specific metrics to track their impact on creative sectors. In Mexico and Peru, efforts to support digitalization through programs like Digitalization and E-Commerce Platforms or Digitalize Your MSME initiative are promising, but insufficient coordination, low digital skills and lack of connectivity in rural areas continue to undermine their reach and effectiveness.

Ultimately, the success of digital and technological support hinges on three factors: contextual adaptation, territorial reach, and sectoral relevance. Programs must be designed with the creative production lifecycle in mind, ensuring access to tools that are not only functional, but also transformative for business models in CCIs. As Felipe Buitrago concluded, “digital transformation is not about buying laptops, it’s about building capacity to tell stories, manage rights, reach audiences, and monetize creativity” (personal communication, 12 March 2025).

5.2.4. **Fostering R&D through Public–Private Partnerships**

Public–private partnerships (PPPs) have proven critical to unlocking innovation in the cultural and creative industries (CCIs), particularly by facilitating research and development (R&D) that transcends traditional sectoral boundaries. When well-articulated, PPPs allow creative MSMEs to access technical infrastructure, co-financing opportunities and knowledge networks that would otherwise be out of reach. Within the APEC region, several economies have pioneered mechanisms that embed CCIs within broader innovation ecosystems, enhancing their visibility and impact.

Korea's TIPS program (Tech Incubator Program for Startups) is widely recognized as one of the most successful public–private models in the region. By matching government R&D funding with private venture capital, TIPS enables creative startups, especially those in content technologies, design, and digital media, to scale in a competitive and supportive environment. As Felipe Buitrago noted, “Korea is a reference in how to manage partnerships between public policy and private venture capital. This model brings public goals and private expertise together around the same table” (personal communication, 12 March 2025). The ecosystem's strength lies not only in financial coordination, but also in the technical mentorship and infrastructure provided by actors such as KOCCA and KVIC.

Canada's Global Innovation Clusters program offers a complementary model. While not designed exclusively for CCIs, the program funds industry-led consortia in fields such as artificial intelligence and digital technologies, creating space for creative enterprises to collaborate with universities and tech firms. These consortia have supported experimental ventures in immersive media, cultural data visualization, and interactive storytelling. The initiative highlights how cross-sector partnerships can situate creative industries as engines of applied innovation, particularly when supported by regional development agencies..

In Australia, programs like the Business Research and Innovation Initiative (BRII) encourage creative firms to develop user-centric solutions to public sector challenges. This has led to the emergence of civic-tech applications with cultural value, such as digital heritage tools and inclusive visual platforms. These models of R&D reinforce the idea that CCIs are not only consumers of innovation, but also generators of applied knowledge.



From a Latin American perspective, however, institutional fragmentation often limits the effectiveness of such partnerships. Carlos Lara reflected on this constraint in relation to Mexico: “We still need to build a bridge between the creative sector and innovation policy. Many of the labs and research centers exist, but they are not yet thinking of culture as an innovation vector” (personal communication, 5 March 2025). His observation illustrates a broader challenge in translating the language of R&D to the realities and rhythms of the creative economy.

In contrast, Indonesia’s decentralized startup incubators, like the Program 1000 Startups Digital, have forged PPPs at local levels, engaging municipalities and universities in the promotion of creative digital entrepreneurship. While promising, these alliances often face uneven implementation due to regional disparities in institutional capacity and funding.

Cultural legitimacy is also a crucial component in fostering R&D within CCIs. As Trinidad Zaldívar argued, “You need to elevate cultural R&D to the same level of legitimacy as industrial R&D. That means supporting experimentation in storytelling, urban art, digital preservation, it’s about recognizing culture as a field of knowledge production” (personal communication, 17 March 2025). Her comment points to the need for policy frameworks that treat creative experimentation as a valid and fundable form of research.

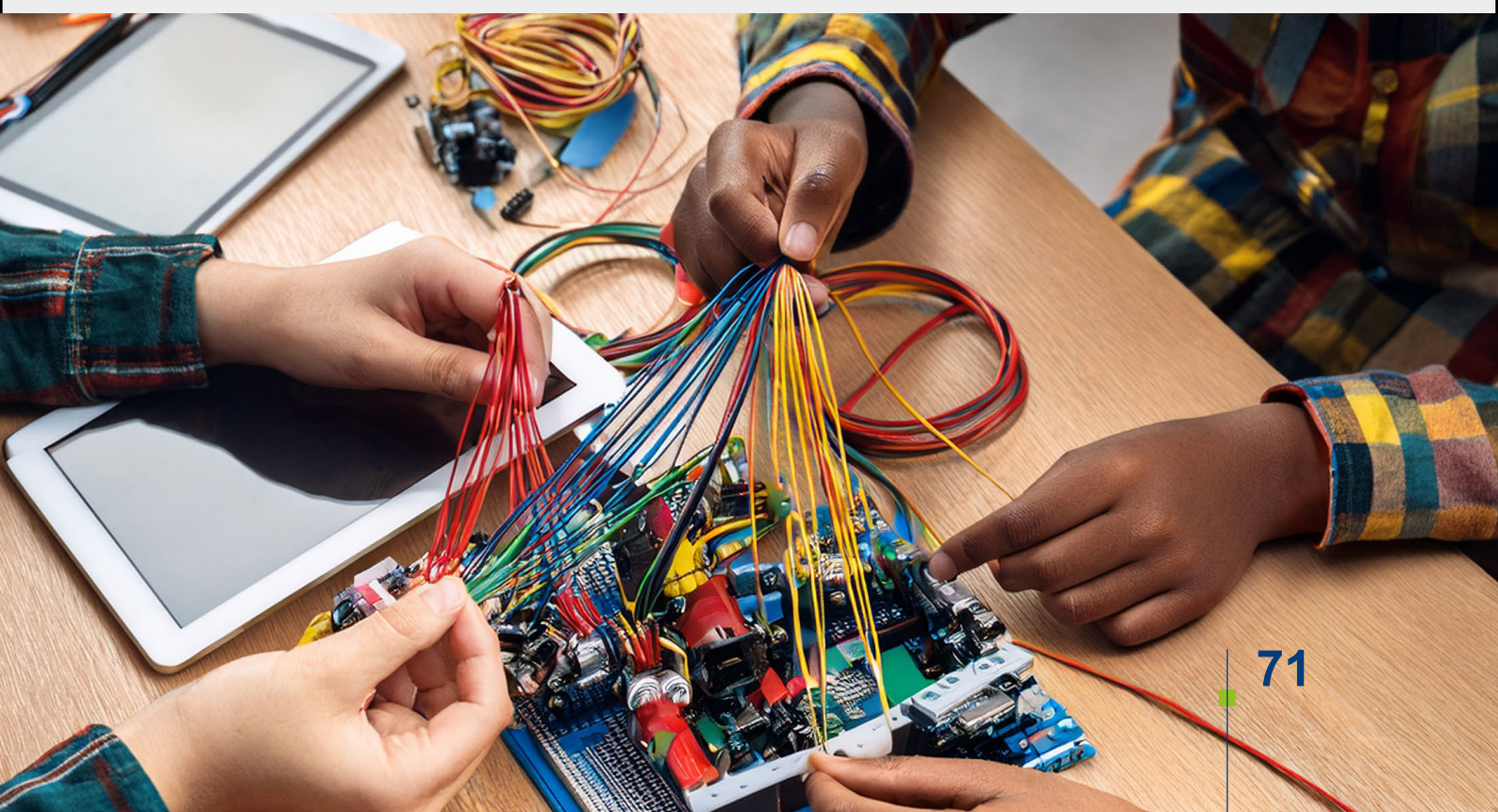
Trinidad also challenged the dominant startup paradigm that prioritizes high-growth,

unicorn-style models, noting: “Not everyone has to be a unicorn. We need to support cultural enterprises that generate value in other ways, through community, through identity, through meaning” (personal communication, 17 March 2025). This reminder underscores the importance of valuing diverse innovation logics within public–private partnerships, beyond those that conform to traditional venture capital metrics.

Additionally, interviewees emphasized the need for R&D support mechanisms that do not solely reward technological outputs, but that also account for aesthetic, social and cultural impact. As Carolina Pereira remarked, “We often exclude cultural enterprises from R&D programs because we don’t see them as inventing anything. But they are inventing

formats, narratives, ways of inhabiting the world, that’s innovation, too” (personal communication, 5 March 2025).

In sum, effective PPPs in the CCI sector require more than just shared funding, they demand shared vision. Integrating cultural creativity into local innovation strategies necessitates rethinking traditional R&D metrics, building cross-sectoral trust, and ensuring that MSMEs have pathways into institutionalized knowledge ecosystems. When done well, these partnerships can drive transformative outcomes not only for creative entrepreneurs, but for broader agendas of technological and social development.



5.2.5. Skills Development and Capacity-Building Programs

Across the APEC region, skills development and capacity-building have emerged as essential levers for strengthening creative MSMEs, especially in the face of rapid digital transformation, changing consumption patterns, and evolving production technologies. Case studies from economies such as Chile; Singapore; and Thailand illustrate how targeted training programs, mentorship schemes, and leadership development strategies can catalyze the long-term growth and resilience of CCIs. However, interviews with practitioners and policymakers also underscore persistent gaps in how these programs are conceptualized and delivered, particularly in relation to cultural specificities, gender dimensions, and informal dynamics of the creative sector.

In Singapore, the Enterprise Leadership for Transformation (ELT) and SkillsFuture Enterprise Credit (SFEC) programs have played a decisive role in advancing entrepreneurial capacities in content creation, digital storytelling and international business development. These programs combine technical training with strategic leadership skills, allowing MSME owners to professionalize their creative ventures while gaining access to global markets. Likewise, Thailand's Business Development Service (BDS) Voucher Scheme subsidizes services in branding, marketing, legal affairs and IP management, responding to a long-standing need for technical assistance among creative entrepreneurs in non-metropolitan areas.

In Chile, initiatives such as Women Entrepreneurship and Bee Capital have enhanced business capacities for women in crafts, audiovisual content and cultural tourism, though these remain limited in scale and often detached from broader innovation strategies. Interviews reinforce the importance of capacity-building positioning not only as a tool for commercialization, but as a space for identity formation, cultural continuity and innovation. As Carolina Pereira noted: "If we only teach creators how to pitch or scale, we miss the point. Capacity-building must include cultural relevance and local ownership. Otherwise, we end up replicating business models that don't fit" (personal communication, 5 March 2025)

This concern is echoed by Dwinita Larasati, who emphasized the importance of embedded mentorship in Indonesia's creative support ecosystem: "We tried to connect older and younger generations of creatives through peer learning. It's not always formal training, it's about building confidence and collective knowledge, especially in traditional sectors" (personal communication, 6 March 2025)

In economies such as Korea and Mexico, however, a more technocratic approach to training often prevails. While programs like Korea's Content Korea Lab and Mexico's legacy INADEM incubators have provided valuable support in digital skills and business planning, several stakeholders raised concerns about the lack of contextual sensitivity.

As Felipe Buitrago warned: "If we treat capacity-building as a technical fix, we're ignoring the structural inequalities that keep some creatives out of the game in the first place" (personal communication, 12 March 2025)

Moreover, these reflections point to a need for diversified pedagogical models that address the varied learning needs of creative entrepreneurs. Trinidad Zaldívar suggested moving beyond short-term workshops toward long-term accompaniment: "You can't transform a creative economy with one-off training. People need continuity, follow-up and support networks that don't vanish after the project ends" (personal communication, 17 March 2025)

Collectively, the interviews and case studies suggest that the most effective skills development strategies are those that combine business competencies with cultural relevance, peer exchange, and long-term mentorship. To avoid reinforcing existing disparities, APEC economies should prioritize inclusive learning environments that accommodate informal creators, non-traditional learners, and marginalized communities. This also requires rethinking evaluation metrics, not only in terms of revenue or employment, but also in terms of empowerment, recognition and sustainability within the cultural ecosystem.

5.2.6. Facilitating Access to Financing Sector-Specific Criteria for CCIs

Across APEC economies, access to finance remains a structural bottleneck for the growth and formalization of micro, small and medium-sized enterprises (MSMEs) in the cultural and creative industries (CCIs). Traditional financial instruments often fail to accommodate the specific characteristics of creative enterprises, such as intangible assets, fluctuating cash flows, and hybrid business models, leaving many firms excluded from mainstream credit systems. Case studies reveal a growing recognition of this gap and highlight a range of innovative responses, from public credit guarantees and microfinance to blended investment mechanisms tailored to creative production cycles.

Korea has emerged as a regional leader in designing finance tools adapted to the needs of creative MSMEs. Programs such as KIBOs IP-based credit guarantees and KVICs venture investment platforms support high-potential startups by valuing their intangible assets, including intellectual property portfolios and creative outputs. The TIPS program goes even further by combining public R&D funds with private co-investment, reducing early-stage risk for creative tech ventures.

Similarly, Thailand's Creative Industries Development Fund (CIDF) and credit guarantees by TCG have broadened financial access for MSMEs in design, digital content and fashion. Meanwhile, China's National Financing Guarantee Fund have enabled large-scale government-backed investment in cultural sectors, although these mechanisms

still struggle with administrative barriers and limited outreach to informal and rural entrepreneurs.

Indonesia and Peru, in contrast, have focused on public microfinance and loan guarantees aimed at informal producers. Programs such as FAE MYPE, UMi, and LPDB illustrate how low-barrier, small-scale finance can support self-employed artisans, craftspeople and cultural microenterprises, though institutional fragmentation and territorial disparities limit their impact. Interviewees offered important nuance to these models. Carlos Lara emphasized the need to rethink how financial viability is assessed in creative sectors: "A creative entrepreneur doesn't always have collateral, but they may have a community, a story, or a unique product. We need financing systems that see that value" (personal communication, 5 March 2025).

In this spirit, Felipe Buitrago advocated for broader criteria in credit scoring and investment decisions: "If we stick to traditional metrics, we exclude most of the creative sector. We need to incorporate indicators like cultural relevance, community impact and even experimental potential" (personal communication, 12 March 2025). Dwinita Larasati offered concrete insights from Indonesia, where microcredit programs have helped bridge cultural and economic goals: "Our best results came when finance was connected to identity, when funding women's weaving collectives or culinary entrepreneurs was also seen as preserving culture" (personal communication,



6 March 2025). Yet, access to finance also remains deeply gendered.

As Carolina Pereira explained: “Women in creative sectors often operate informally, without bank accounts or business records. If we don’t adapt financial instruments to that reality, we reproduce inequality” (personal communication, 5 March 2025). Despite these advances, many APEC economies still lack dedicated credit instruments for CCIs or fail to integrate creative enterprises into broader financial inclusion agendas. Fragmentation between economic and cultural agencies often results in funding overlaps or institutional gaps, while existing support tends to favor export-ready or tech-intensive firms.

A key recommendation that emerges is the need for CCI-specific financing frameworks that combine credit guarantees, equity mechanisms and public-private partnerships, while recognizing the non-linear revenue models and community-based dynamics of many creative ventures. These tools must also be embedded in ecosystems that offer technical assistance, financial literacy, and inclusive outreach, especially for women, Indigenous creators and informal entrepreneurs.

5.2.7. Promotion of Internationalization and Access to Regional Markets

The internationalization of micro, small, and medium-sized enterprises (MSMEs) in the cultural and creative industries (CCIs) has emerged as a strategic priority across APEC economies, both as a pathway to economic diversification and as a vehicle for soft power. However, expanding into global and regional markets presents significant challenges for creative MSMEs, particularly those operating outside metropolitan areas or in informal contexts. Case studies demonstrate a range of mechanisms designed to address these barriers, from export grants and market intelligence tools to branding strategies and mobility schemes.

Canada offers one of the most comprehensive internationalization frameworks, having developed the Creative Export Strategy and the Creative Export Canada program, which provide project-based funding, market analysis and export support to creative firms and complements other federal funding support for the export activities of creative industries. These instruments are complemented by Global Affairs Canada's CanExport program and the efforts of the Trade Commissioner Service, creating an ecosystem that positions CCIs as export-ready industries and cultural ambassadors.

Chile has integrated creative industries into its broader trade promotion strategy through ProChile, facilitating participation in trade fairs and connecting creative MSMEs with international buyers. However, as the case notes, these services are often more accessible to medium-sized firms with previous export experience, revealing persistent gaps in export readiness among smaller or rural ventures.

Australia, through its Export Market Development Grants (EMDG), reimburses part of the costs incurred by creative MSMEs seeking to access foreign markets. This program supports international marketing, participation in festivals and exhibitions and digital promotion, key tools for the global visibility of Australian creators. Similarly, Korea has positioned CCIs as central to its soft power diplomacy, linking creative exports to local branding through initiatives such as the K-Startup Grand Challenge and the international promotion efforts of KOCCA.

Interviewees highlighted the value of these mechanisms while also underscoring the need to adapt them to the realities of the sector. Trinidad Zaldívar noted that: "The creative economy is not just about exporting



products, it's about exporting narratives, identities and ways of seeing the world. That requires more than just trade logistics" (personal communication, 17 March 2025). Carlos Lara added that regional integration can be a steppingstone for many MSMEs: "Before thinking about Europe or North America, many Latin American creative firms could benefit from more structured regional networks and cooperation frameworks" (personal communication, 5 March 2025).

Dwinita Larasati, reflecting on the Indonesian context, emphasized that internationalization must be inclusive: "When we only focus on high-end design or digital firms, we forget the cultural entrepreneurs in villages whose products carry centuries of tradition. They also deserve access to global audiences" (personal communication, 6 March 2025). Indeed, several economies, including Indonesia; Mexico; and Peru, continue to face challenges in developing targeted export support for creative sectors. While trade promotion agencies have begun to include cultural goods in their portfolios, a lack of dedicated tools for export readiness, such

as language training, IP guidance, or pricing models, limits the ability of smaller firms to navigate international markets.

Moreover, interviewees warned that gender and territorial inequalities are often reproduced in internationalization strategies. Carolina Pereira highlighted: "We see a lot of support for internationalization, but not enough disaggregated data. Who's actually benefiting from these programs? Are women and Indigenous creators being included?" (personal communication, 5 March 2025).

To address these gaps, the most effective models combine financial support, capacity-building, and network facilitation, not only enabling participation in foreign markets but also empowering creative MSMEs to position their value in culturally meaningful and economically sustainable ways. Importantly, internationalization should not be limited to export outcomes but also include regional collaboration, co-productions and knowledge exchange platforms that reflect the diverse realities of creative work across APEC.

5.2.8. Building an Enabling Ecosystem for Creative MSMEs

A supportive institutional framework is foundational to the long-term development of cultural and creative industries (CCIs). This includes not only the existence of dedicated agencies and cross-sectoral governance models but also the creation of fiscal environments that reduce administrative burdens and recognize the unique characteristics of creative MSMEs. Across APEC economies, the coherence, adaptability and specialization of public institutions have proven decisive in enabling or constraining the growth of CCIs.

As seen in the case of Korea, strong institutional coordination through actors such as the Ministry of SMEs and Startups (MSS), KOCCA, and KVIC have established a robust and highly integrated support ecosystem. These institutions operate under a shared strategic vision that aligns culture, innovation and industrial competitiveness. Similarly, Singapore's institutional ecosystem, anchored in the Smart Nation Initiative, provides seamless digital services, licensing support and regulatory simplification through platforms such as GoBusiness, enabling creative entrepreneurs to formalize operations and scale efficiently.

Interviewees consistently pointed to the importance of institutional stability and policy coherence. Carlos Lara noted: "The presence of an agency that can lead the creative economy agenda makes a huge difference. It provides continuity, visibility and helps avoid the dispersion of efforts across ministries" (personal communication, 5 March 2025). This insight echoes the experiences of Thailand, where the creation of the Creative Economy Agency (CEA) in 2018 provided a technical and coordinating backbone for the creative economy. The CEA has since led programs such as CIDF and Ignite Thailand, helping consolidate fragmented initiatives and channel resources toward creative clusters.

Indonesia also illustrates the value of institutional innovation. The establishment of BEKRAF in 2015 marked a turning point in the consolidation of CCI policy leadership, coordinating over 16 sub-sectors under a single vision. Although BEKRAF was later merged into the Ministry of Tourism and Creative Economy, its legacy endures in the structure of current programs. As Dwinita Larasati explained: "BEKRAF helped the creative economy become visible, it created a sense of identity and direction. The challenge now is ensuring continuity despite institutional

changes” (personal communication, 6 March 2025). The Indonesian case highlights both the opportunities and fragility of institutional gains, particularly when they depend on specific agencies without broader cross-ministerial reinforcement.

However, many economies still grapple with institutional fragmentation. In Peru, for example, while there is growing recognition of the creative sector’s value, programs remain dispersed across ministries and policy coordination remains limited. This has led to overlaps, inefficient funding allocation and confusion among beneficiaries. Interviewees stressed the importance of whole-of-government approaches. Trinidad Zaldívar emphasized: “We can’t keep treating culture, innovation and economic policy as separate silos. Creative industries sit at their intersection. The state [government] needs to reflect that” (personal communication, 17 March 2025).

A complementary dimension of institutional support is the creation of a fiscal and regulatory environment that is adapted to the realities of creative MSMEs. Traditional tax and labor frameworks often fail to account for the irregular income patterns, seasonal projects, or collaborative business models that characterize the sector. In response, Chile has advanced regulatory simplification through the Small Size Enterprise Division (DEMT) and formalization programs, while Korea and China have introduced IP-based guarantees and credit scoring models that reflect intangible assets.

Still, these efforts are uneven. Dwinita Larasati warned that in Indonesia, regulatory complexity continues to be a major deterrent for creative entrepreneurs: “Even applying for support can be a barrier. Many creative entrepreneurs don’t know which agency to approach, or how to present their work in ways that match rigid public program formats” (personal communication, 6 March 2025). To improve this landscape, several interviewees proposed the creation of intermediary institutions or platforms that can act as navigators, translating between the needs of creative enterprises and the requirements of public support mechanisms. These entities could also help improve outreach to marginalized groups, strengthen monitoring and evaluation systems and build trust across public and private stakeholders.

AA good practice in this regard is the one developed by Chile’s Secretariat of Creative Economies through its Program for the Promotion and Development of Creative Ecosystems, which funds activities aimed at building creative ecosystem networks across the economy. This initiative promotes public–private collaboration and culminates in an annual event where all creative ecosystem networks interact, thereby strengthening the sector’s territorial and cross-sectoral coordination (Government of Chile, Ministry of Cultures, Arts and Heritage, n.d.).

Precisely, the strength of institutional frameworks lies not only in the quantity of programs or agencies but in their ability

to coordinate, adapt and respond to the evolving nature of CCIs. As Carolina Pereira summarized: “It’s about building ecosystems, not silos. Agencies need to talk to each other, share data and understand that supporting creative entrepreneurs means understanding their diversity, not standardizing them” (personal communication, 5 March 2025).

The experiences across APEC suggest that strong ecosystems are not defined solely by the presence of funding or policy instruments, but by the institutional capacity to weave together stakeholders, align incentives and evolve with the sector’s transformations. Ecosystems thrive where governance is dynamic, inclusive and capable of translating creative potential into long-term development strategies. As such, the next frontier for public institutions in APEC economies is not just to manage programs, but to orchestrate ecosystems that support the full lifecycle of creative MSMEs, from ideation and incubation to commercialization and global integration.

06

SURVEY RESULTS

06

SURVEY RESULTS

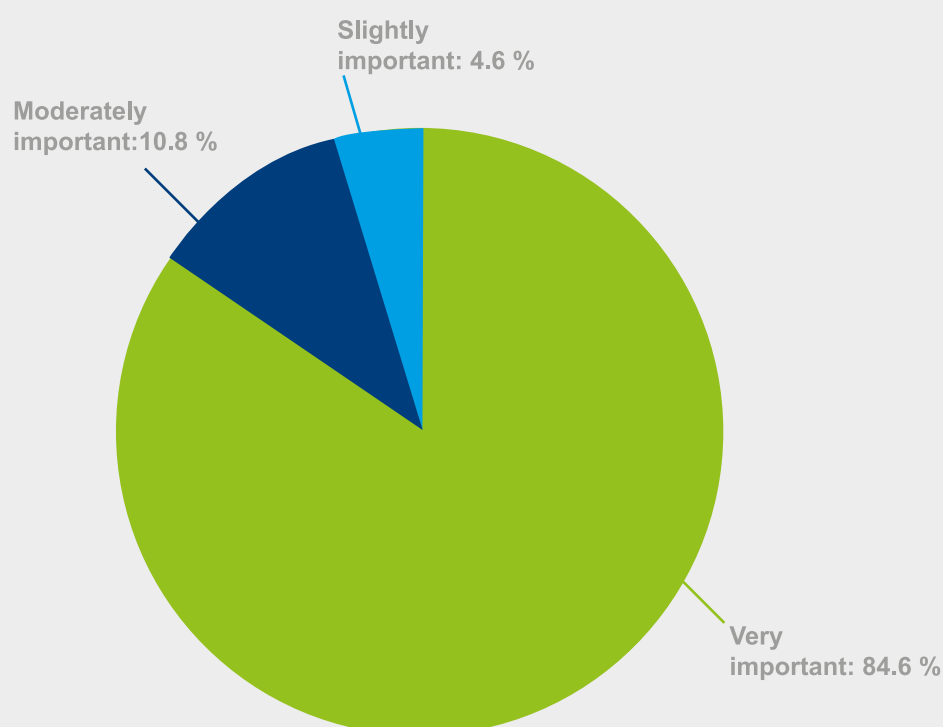
Building upon the evidence gathered through the case studies, the project advanced a second analytical phase grounded in a regional survey aimed at identifying the challenges, needs, and policy expectations of stakeholders operating within the cultural and creative industries (CCIs). The questionnaire, included in Annex 4, was developed to capture institutional perceptions, sectoral gaps, and opportunities for reform, with a particular focus on micro, small and medium-sized enterprises (MSMEs). Responses collected from across the APEC region revealed a series of structural patterns and revealed strong alignment between policy priorities and stakeholder demands.



6.1 Recognition of CCIs and Strategic Integration

A vast majority of respondents (84.6%) considered the integration of CCIs into MSME development strategies to be "very important," underscoring a shared conceptual recognition of the sector's cultural and economic value. This level of consensus reflects a maturing discourse: CCIs are no longer seen as peripheral or symbolic but as strategic sectors capable of driving innovation, competitive differentiation and access to new markets. However, while the perception is favorable, translating this recognition into structural inclusion within domestic development programs remains a key challenge. A clearer and more operational definition of CCIs is also required to enable effective institutionalization and policy targeting.

Figure 3. How important is the integration of CCIs for MSMEs to develop innovative products and differentiate themselves in competitive markets?

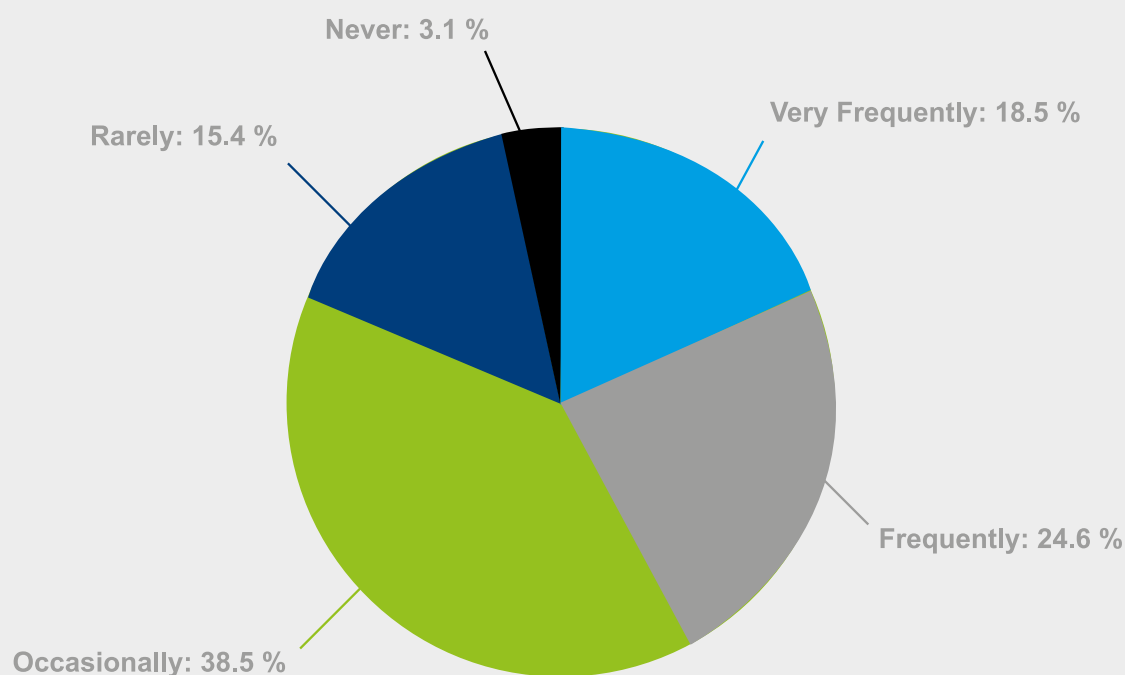


Source: DESG 203 2023A Survey (2025)

6.2 Collaboration and Ecosystem Connectivity

Despite the high valuation of the sector, collaborative engagement remains limited. Only 18.5% of respondents reported frequent participation in collaborative initiatives, while the majority (38.5%) indicated only occasional involvement. This disconnect suggests a latent interest that is not yet activated by enabling platforms. The lack of institutional facilitators, structured networks, or dedicated funding streams for co-creation likely hinders sustained cooperation across sectors. Strengthening public-private dialogue, establishing collaborative clusters and creating incentives for joint ventures emerged as priorities for activating a more integrated creative ecosystem.

Figure 4. How frequently does the APEC economy you belong to participate in collaborative initiatives to expand the reach of its creative industries?

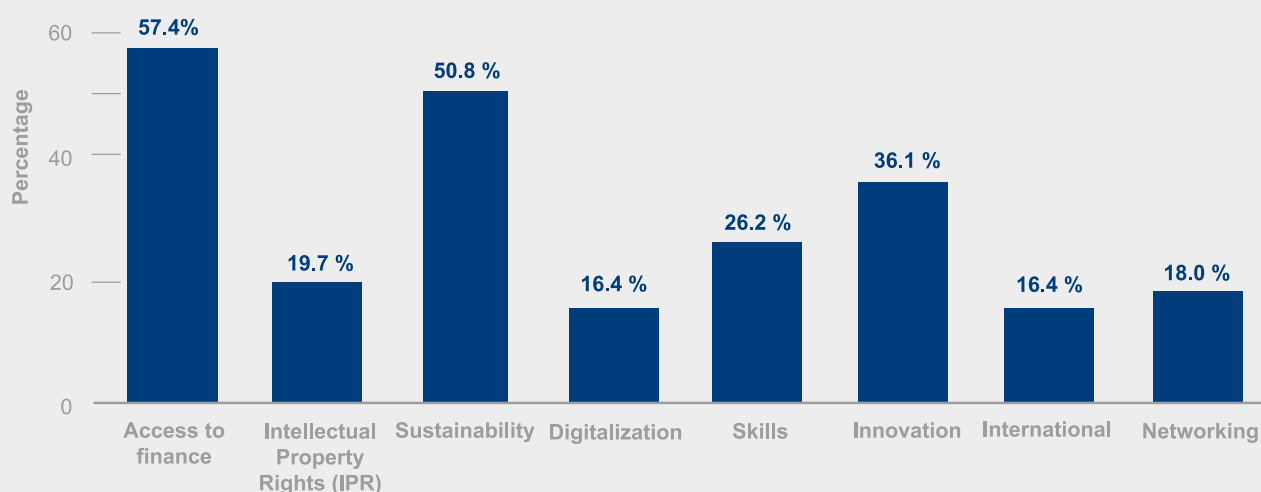


Source: DESG 203 2023A Survey (2025)

6.3 Access to Finance and Sector Sustainability

The most pressing barrier identified by respondents was access to finance (57.4%), followed closely by sustainability (50.8%) and innovation (36.1%). These responses highlight how financial constraints interact with other critical aspects of sector development. Lack of financing hinders digitalization, business formalization, market expansion and even basic operational continuity. The results reaffirm the importance of developing financing tools tailored to the creative sector, tools that can accommodate intangible assets, informal business models and high-risk innovation. Proposed instruments include blended finance mechanisms, flexible credit lines, and guarantee schemes sensitive to the CCI profile.

Figure 5. What are the most pressing topics for CCIs?

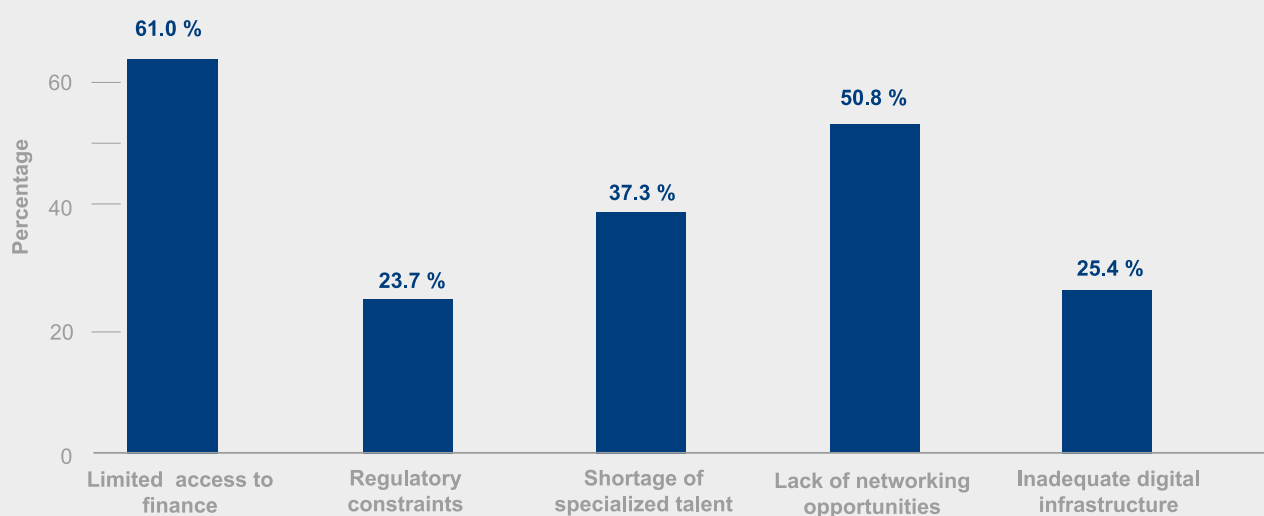


Source: DESG 203 2023A Survey (2025)

6.4 Digitalization and Strategic Misalignment

While infrastructure gaps (61%) and limited technical talent (25.4%) were reported as primary obstacles to digital transformation, only 16.4% of respondents identified digitalization as an urgent priority. This misalignment suggests that many creative MSMEs may be adopting superficial digital tools (e.g., social media, e-commerce) without fully engaging in deeper transformations such as digital rights management, content monetization, or data-driven decision-making. The results call for awareness-raising initiatives, technical assistance programs and investment in rural connectivity to ensure equitable digital inclusion.

Figure 6. What do you consider the most significant barriers to growth and resilience for MSMEs in the cultural and creative industries within your economy?

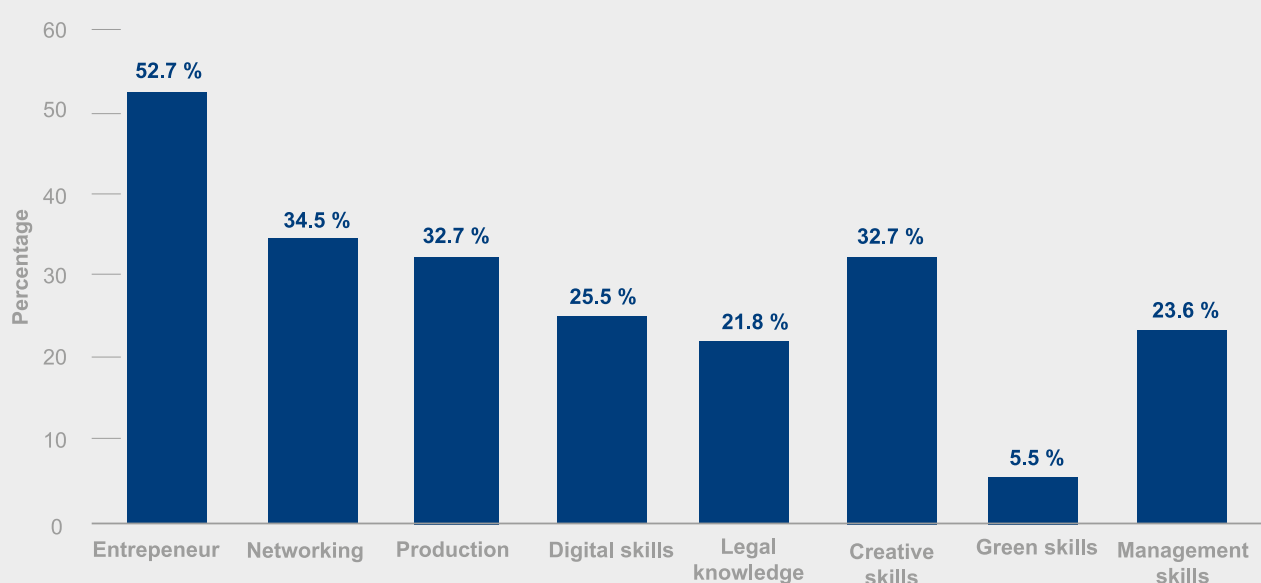


Source: DESG 203 2023A Survey (2025)

6.5 Skills and Strategic Capacities

Survey participants emphasized the need for entrepreneurial (52.7%), networking (34.5%), and creative (32.7%) skills, indicating that the key barriers are not solely technical. Many MSMEs lack the strategic vision, market knowledge and operational skills necessary to scale or sustain their ventures. Respondents also noted that intellectual property (IP) management should be understood primarily as a business strategy rather than a legal issue, pointing to a need for capacity-building initiatives that focus on the monetization of IP. Mentorship, peer learning and incubator-based approaches were identified as more effective than isolated training workshops.

Figure 7. Which skills would you consider most relevant to strengthen?

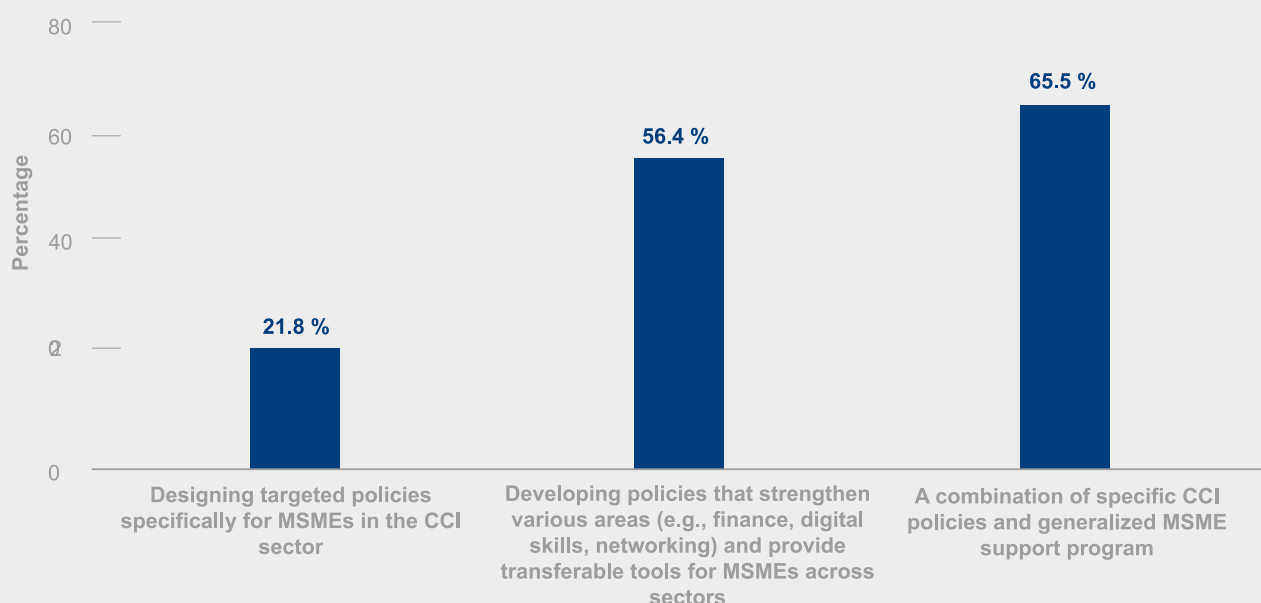


Source: DESG 203 2023A Survey (2025)

6.6 Policy Design and Sectoral Integration

A significant portion of respondents (65.5%) expressed a preference for mixed policy approaches that combine targeted CCI programs with broader MSME initiatives. This dual-track model reflects the complex nature of the creative economy, which requires tailored instruments while also benefiting from integration into local innovation, export, and digital agendas. The challenge is to adapt existing MSME support schemes to the specific needs of CCIs without duplicating structures or creating new institutional silos. Flexibility and adaptability were emphasized as guiding principles for policy innovation.

Figure 8. In your opinion, which approach is more effective for supporting MSMEs in the CCI sector?

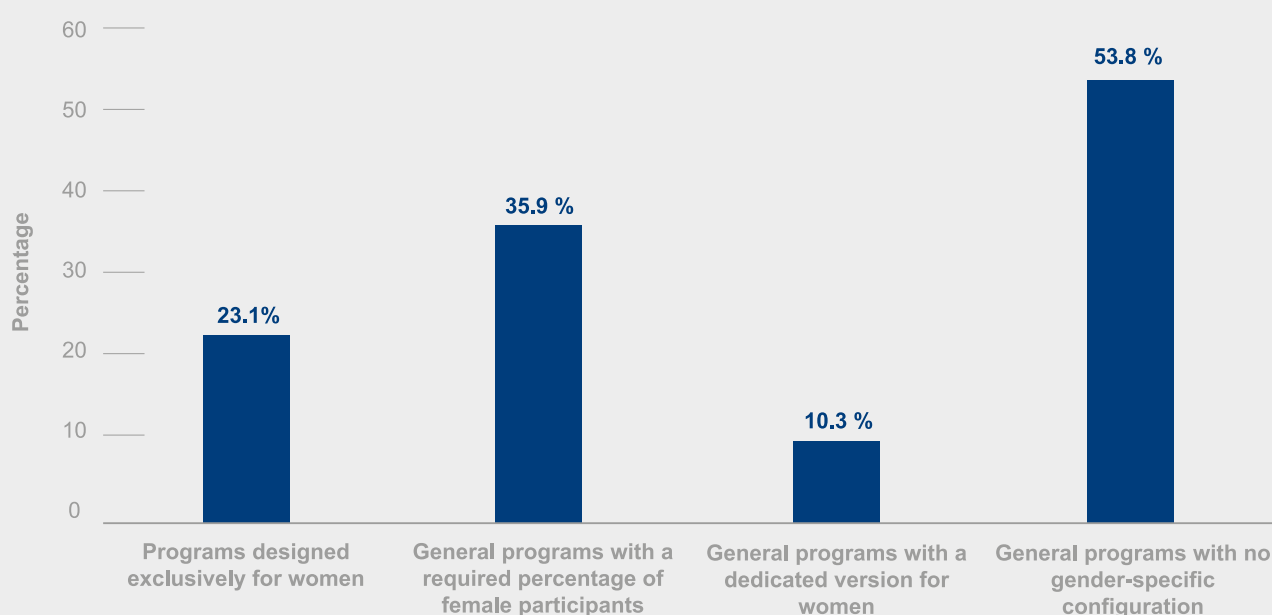


Source: DESG 203 2023A Survey (2025)

6.7 Gender Perspectives and Equity Blind Spots

More than half of the respondents preferred gender-neutral programs, and only 10.3% supported initiatives designed exclusively for women. While this may reflect a belief in universal inclusion, it may also obscure structural inequalities that disproportionately affect women in CCIs, such as limited access to leadership roles, credit, or professional networks. The results underscore the need for differentiated data collection, equity-focused indicators and proactive inclusion mechanisms that promote women's participation in strategic areas of the creative economy without imposing rigid gender segmentation.

Figure 9. Which approach do you believe is most effective for gender-inclusive support programs in the CCI sector?



Source: DESG 203 2023A Survey (2025)

6.8 Ecosystem Conditions and Systemic Barriers

Overall, the survey revealed strong willingness and readiness across economies to strengthen CCI ecosystems. There is a high level of stakeholder interest, a shared diagnosis of barriers and a clear appetite for collaboration. However, key systemic barriers remain unresolved, particularly in areas of institutional articulation, financing, digital infrastructure and capacity development. Respondents emphasized the importance of aligning public and private incentives, territorial outreach and cross-sectoral partnerships to unlock the sector's full potential. Without such strategic interventions, CCIs risk remaining highly valued yet institutionally marginalized.

The survey results offer a grounded perspective on the structural and perceptual factors shaping CCI development in the APEC region. They reinforce many of the patterns identified in the case studies and interviews, confirming the need for comprehensive, adaptive and inclusive policy responses. By addressing financing constraints, strengthening collaboration and tailoring digital and capacity-building tools, APEC economies can better integrate creative MSMEs into future-facing development strategies.



07

WORKSHOP INSIGHTS

07

WORKSHOP INSIGHTS

Building on the regional survey results, the workshop held on 30 January 2025 offered an opportunity to delve deeper into the institutional and policy challenges shaping the integration of cultural and creative industries (CCIs) within the MSME ecosystem. One of the most pressing findings from the survey was the conceptual ambiguity surrounding the definition of CCIs, an issue that was echoed and further unpacked during the workshop. Participants widely agreed that the lack of a shared and operational definition of CCIs complicates policy formulation and implementation, contributing to fragmented public strategies and missing opportunities for sectoral support.

By engaging high-level stakeholders in three rounds of dialogue, the workshop allowed for a comparative and collaborative exploration of key policy questions. The following insights reflect the richness of those conversations and offer actionable reflections for future policy design.

7.1 Defining the Creative Sector Remains a Conceptual and Political Challenge

Participants from multiple economies emphasized that the absence of a common, actionable definition of CCIs remains a structural barrier to effective policymaking. The term is often misunderstood or diluted in public discourse, leading to policy misalignment and limited public awareness. For example, it was recalled that in Chile, an economy-wide survey once revealed confusion between the term “creative economy” and domestic household activities. This lack of clarity has significant consequences: it undermines the visibility of CCIs as productive sectors, hampers data collection and weakens the ability of policymakers to justify long-term investments in the sector.

The discussions reinforced the importance of developing context-sensitive definitions that capture both the economic and cultural value of CCIs. Participants advocated for definitional frameworks that are neither too narrow (excluding emerging practices such as digital storytelling or game development) nor too broad (risking dilution). Operational clarity was also seen as essential to guide budget allocations, statistical tracking and cross-sector partnerships.

7.2 Public Policies Must Be Cross-Cutting, Multisectoral, and Long-Term

A recurrent theme across the workshop was the urgency of moving beyond fragmented, short-term policies. In the first discussion room, participants argued for the recognition of CCIs as strategic and productive sectors, on par with more traditional industries and not merely as cultural or symbolic assets. This framing implies the need for inter-ministerial coordination, durable governance structures and robust monitoring mechanisms that transcend electoral cycles.

The experience of Korea was cited as a compelling example of this approach: long-term planning, cross-sector coordination and sustained public–private partnerships have enabled the economy to establish a globally competitive creative ecosystem. In contrast, participants from other economies noted how frequent government turnover, lack of policy continuity and underfunded institutions severely limit the impact of creative economic strategies. Workshop attendees called for the construction of government policies rather than government programs capable of enduring political shifts while adapting to sectoral evolution.

7.3 Gender Mainstreaming Requires Segmentation, Data, and Evaluation

Discussions in the second room focus on how gender inclusion can strengthen the growth of creative MSMEs. While gender mainstreaming is widely accepted as a guiding principle, participants noted that its implementation often lacks depth. There was strong consensus that effective gender policies require detailed, disaggregated data, by gender, sector and scale of enterprise, to identify the specific barriers that women face in different creative sub-sectors.

Affirmative actions, including quotas or funding earmarked for women-led enterprises, were viewed as potentially effective but only if time-bound, well-targeted, and evaluated for impact. Participants also warned against the homogenization of women's experiences within CCIs. Intersectionality must be part of policy design: the barriers faced by a woman in urban digital design differ markedly from those of a woman in rural artisanal crafts. Smart segmentation was therefore framed as key to developing inclusive, data-driven interventions that go beyond symbolic gestures.

7.4 Educating Policymakers Is Key to Diversifying Support Beyond Financing

In the third discussion room, the need to build institutional knowledge about the specific needs of creative enterprises was a central concern. Participants emphasized that many policy officials still view the creative sector through a limited lens, often assuming that its primary need is funding. While access to capital remains critical, attendees argued for a more diversified and strategic toolbox of support mechanisms.

These include intellectual property support, mentoring programs, digital infrastructure, prototype development and business model innovation. The notion that “creative

entrepreneurs don’t just want funding; they want to work” resonated strongly throughout the discussion. As one participant noted, policies must support not only the survival of creative enterprises but also their capacity to generate and capture value on their own terms.

There was also a consensus on the need for training programs aimed at public officials, helping them understand the dynamics of CCI and their difference from conventional MSMEs. Without this baseline of knowledge, well-intentioned interventions risk falling short of sector needs or reinforcing existing gaps.

7.5 Linking Digital and Traditional Creative Sectors Offers Strategic Opportunities

Participants also highlighted the potential of connecting digitally driven creative sectors (e.g., animation, gaming, immersive media) with more traditional or community-based creative practices (e.g., performing arts, crafts, oral storytelling). These linkages can unlock new models of hybrid value creation, foster innovation rooted in cultural identity and expand market access for underserved creative groups.

However, realizing this potential requires intentional policy design. Governments must invest in infrastructure, capacity-building and matchmaking platforms that facilitate encounters between these historically disconnected sub-sectors. Political will and cultural sensitivity are essential to avoid extractive dynamics and ensure mutual benefit.

7.6 Institutional Continuity Is Critical for Sector Strengthening

Across all three discussion rooms, participants expressed concern over the fragility of institutional structures supporting CCIs. Promising programs often disappear or lose funding when government priorities shift, making it difficult to sustain momentum or scale successful pilots. This instability erodes trust among creative entrepreneurs and weakens the policy ecosystem.

Participants called for institutional reforms that embed creative economy strategies into domestic development plans, create permanent interagency commissions and establish public agencies with technical independence. These proposals reflect a broader aspiration: to build durable, mission-driven institutions that support creative entrepreneurs beyond political cycles.

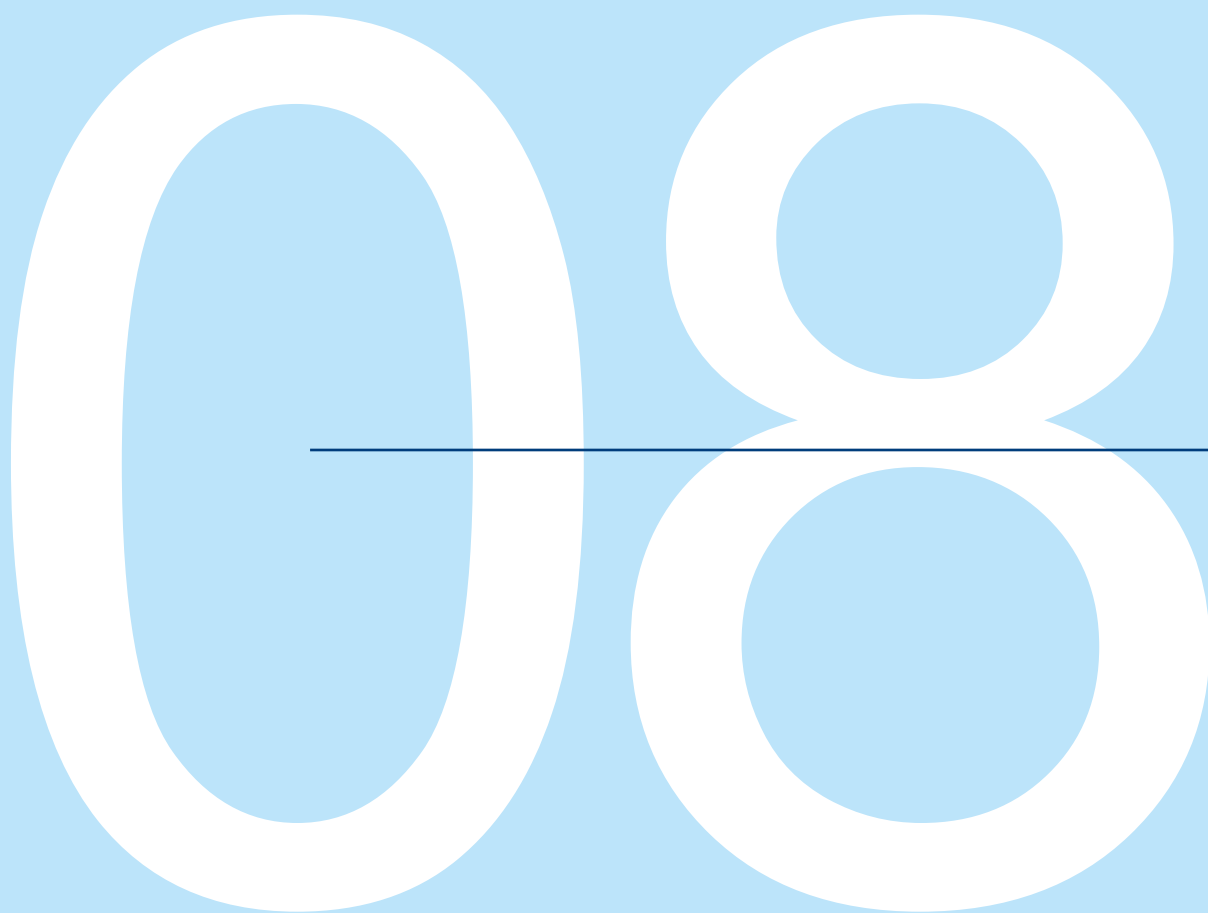
7.7 Networks and Community Building Are Vital for Resilience

Finally, the importance of fostering community among creative actors emerged as a central insight. Participants noted that in highly fragmented environments, the sense of belonging and mutual support offered by networks can be transformative. Beyond enabling resource sharing or collaboration, these networks cultivate identity, amplify collective voice and enhance resilience in times of crisis.

Governments were encouraged to support the creation of peer-to-peer learning platforms, regional alliances, and local hubs that allow creative entrepreneurs to connect, learn and grow together. Such networks are especially critical in contexts where institutional support

remains limited or inconsistent.

These insights reinforce and expand on the findings of the regional survey. They point to a policy horizon in which CCIs are no longer peripheral, but embedded as central pillars of MSME development, cultural vitality and inclusive innovation. Ensuring the long-term success of this agenda requires not only funding, but reimagining public sector roles, building lasting institutions, and investing in the creative communities themselves.



FINAL CONCLUSIONS

08

FINAL CONCLUSIONS

This report presents a set of thirteen key conclusions aimed at guiding decision-makers in strengthening public policies for micro, small and medium-sized enterprises (MSMEs) in the cultural and creative industries (CCIs) sector. These conclusions are based on a triangulated analysis of regional surveys, expert interviews, multi-actor workshops and case studies from ten APEC economies.

8.1 **Creative MSMEs must be recognized as strategic economic actors**

Creative MSMEs are not merely cultural expressions; they are also an essential part of the contemporary economy. They generate employment, drive innovation and strengthen territorial identity. When integrated transversally into local development strategies, they can enhance sectors such as tourism, technology, education and urban regeneration. This recognition requires economic institutions, in addition to cultural ones, to develop specific policies for the sector. This finding was highlighted in interviews with Carlos Lara and Felipe Buitrago, and is confirmed in the case studies of Chile; Korea; and Singapore.

8.2 Access gaps persist and require policies tailored to the logic of the sector

Many creative MSMEs are excluded from traditional support instruments due to informality, lack of tangible guarantees, or unconventional business models. Therefore, policies must be designed with these particularities in mind, offering more flexible, phased mechanisms adapted to creative cycles. Solutions should range from microcredits based on intangible assets to specialized incubators. This conclusion is supported by the survey, regional workshop results and interviews with Dwinita Larasati and Carolina Pereira.

8.3 Institutional coordination is essential to achieve impact and sustainability

A strengthened creative ecosystem requires an institutional framework that connects culture, economy, education, foreign trade and innovation. Successful experiences show that specialized agencies, intersectoral committees, and stable domestic strategies are essential tools to avoid duplication and increase program efficiency. Sustainability depends on permanent structures with clear mandates and budgets. This need was evident in the cases of Chile; Indonesia; and Singapore, and reinforced in interviews with Trinidad Zaldívar and Felipe Buitrago.

8.4 **Digital transformation must go beyond infrastructure: it requires technological inclusion and sector-specific literacy**

Access to digital tools is key for creative MSMEs to scale and internationalize. However, infrastructure alone does not guarantee adoption or productive use. Policies must include specific training, development of platforms tailored to the sector and continuous support, especially in less connected regions. This conclusion is drawn from the case studies of Australia; Peru; and Thailand; reinforced by the survey and interviews with Dwinita Larasati and Carlos Lara.

8.5 **Gender inclusion and territorial focus must be incorporated from the policy design stage**

Women and peripheral territories are overrepresented at the base of the creative ecosystem but underrepresented in decision-making spaces, financing and visibility. Equity is not an automatic outcome but a goal that requires specific policies, disaggregated data, differentiated incentives and monitoring mechanisms with an intersectional approach. This point is supported by the cases of Canada; Mexico; and Peru; the survey; and interviews with Carolina Pereira and Trinidad Zaldívar.

8.6 Data is essential for informed decision-making and impact assessment

The lack of detailed information about the sector limits the design and monitoring of policies. It is necessary to develop statistical systems and observatories that collect data disaggregated by subsector, territory, gender and formality, facilitating comparative analysis and measurement of the creative ecosystem's economic and social impact. The regional workshop, case studies and interviews with Felipe Buitrago highlight this as one of the main obstacles to public planning.

8.7 International cooperation and peer learning enhance innovation and replicability

The exchange of best practices, knowledge and intervention models allows economies to accelerate institutional improvement processes. Platforms such as APEC, UNESCO, or the IDB are key for promoting shared strategies, exploratory missions, regional learning networks and collaborative projects. This recommendation is based on the regional workshop results, the cases of Indonesia and Singapore and interviews with Dwinita Larasati and Trinidad Zaldívar.

8.8 Creative MSMEs are key to productive diversification and economic resilience

During crises such as the pandemic, many creative MSMEs demonstrated adaptability, generating new formats, migrating to digital and responding to emerging needs. Their flexibility, scalability and low entry cost make them an essential component of future economies. This conclusion emerges from case studies of China; Indonesia; and Korea and was emphasized in interviews with Felipe Buitrago and Carlos Lara.

8.9 **Centralization limits the development of the creative ecosystem and widens territorial gaps**

Unequal access to infrastructure, funds, networks, and training is exacerbated when policies are concentrated in major urban centers. Decentralization is not only a strategy for territorial equity but also a way to activate local talent and knowledge that enriches the ecosystem's diversity. This finding was reiterated in the survey, the regional workshop and the cases of Chile; Mexico; and Peru.

8.10 **Women's participation is high, but their access to resources and leadership remains unequal**

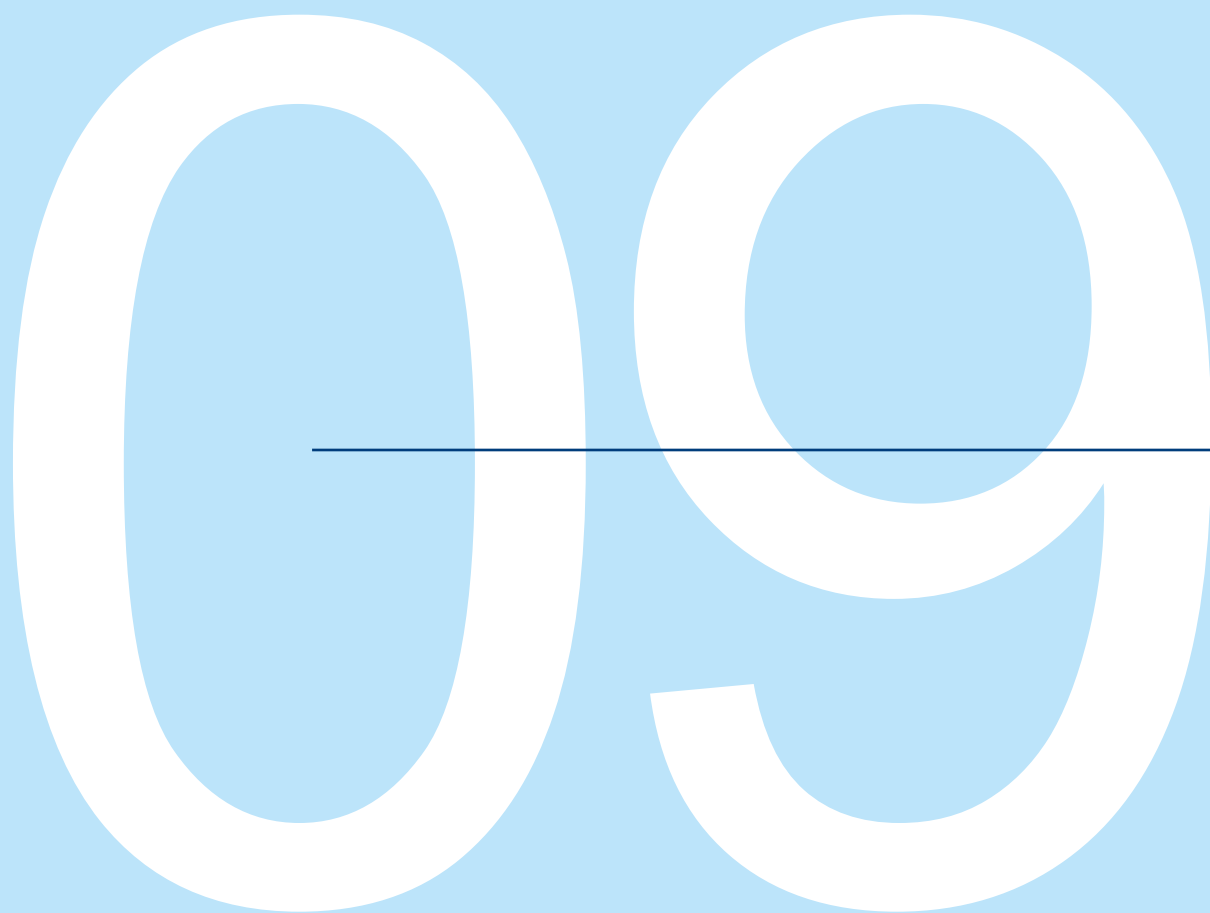
Although many creative MSMEs are led by women, their opportunities to scale, export, or formalize remain limited. Gaps in access to finance, influence networks and specialized training demand affirmative interventions from the policy design stage. This conclusion is supported by the case studies of Canada and Mexico; the survey; and interviews with Carolina Pereira and Trinidad Zaldívar.

8.11 Lack of institutional continuity undermines policy sustainability

Disruptions in program continuity due to government changes or institutional restructuring directly affect the creative ecosystem's trust. Institutional stability, legal frameworks and multi-year budget allocations are necessary conditions to achieve lasting impact. Cases from Chile; Indonesia; and Mexico and interviews with Trinidad Zaldívar and Carlos Lara, underline this issue.

8.12 Creative industries require a specific and culturally adapted internationalization strategy

Exporting cultural goods and services involves different challenges than other sectors: symbolic circulation, international regulations, translation, copyright, digital platforms. Creative MSMEs need instruments tailored to these challenges, including fairs, hubs, legal advisory and international networks. This point was developed from the cases of Korea; Peru; and Singapore and interviews with Buitrago and Larasati.



**RECOMMENDATIONS
FOR APEC ECONOMIES**

09

RECOMMENDATIONS FOR APEC ECONOMIES

The analysis of interviews, survey responses, workshop discussions, and regional case studies reveals that many of the challenges facing micro, small and medium enterprises (MSMEs) in cultural and creative industries (CCIs) can be addressed through the design and implementation of targeted public policy instruments. These instruments should reflect the structural particularities of the sector, including informality, intangible value creation and high territorial dispersion and transform existing gaps into actionable opportunities. Six categories of instruments are proposed below, based on lessons learned from APEC economies.

9.1 Institutional Instrument: Clarify and Harmonize the Definition of CCI

One of the most recurrent barriers identified across the project was the lack of a common understanding of what constitutes cultural and creative industries. This conceptual fragmentation directly limits the eligibility of creative MSMEs for public programs and creates confusion among policymakers. To address this, APEC economies are encouraged to develop a shared and operational definition of CCIs that encompasses both cultural and economic dimensions. This definition should be developed through participatory mechanisms and reflect the diversity of productive models across the region, including traditional sectors such as handicrafts and heritage, as well as emerging domains like digital design and gastronomic innovation. Clear definitions will not only improve coordination among institutions but also facilitate the design of integrated support policies.

9.2 Financial Instrument: Design Creative-Specific Financial Mechanisms

Traditional financial instruments often exclude creative enterprises due to irregular revenue cycles, lack of tangible assets and informal structures. These conditions particularly affect women-led and community-based initiatives. In response, public institutions should design hybrid financing mechanisms that combine public and private capital, while incorporating risk assessment tools based on intellectual property and other intangible assets. Creating dedicated credit lines for underrepresented groups within CCIs, such as women entrepreneurs or Indigenous cultural collectives, can enhance equity and access. Models such as China's cultural investment funds and Korea's TIPS program serve as valuable references for public-private co-financing schemes tailored to creative innovation.

9.3 Infrastructure Instrument: Promote Inclusive and Specialized Digital Infrastructure

While digital transformation offers significant opportunities for creative MSMEs, access to appropriate infrastructure, training and protection mechanisms remain uneven. Investments are needed in sector-specific digital platforms that facilitate content distribution, copyright management, and e-commerce. In parallel, rural connectivity should be prioritized to ensure that creative producers outside of major urban centers are not left behind. Digital literacy programs should be designed with a territorial approach, addressing the real needs of creative entrepreneurs, from monetization strategies to IP protection. This requires adapting regulatory frameworks to safeguard rights while enabling cross-border trade in creative goods and services.

9.4 Capacity-Building Instrument: Support Culturally Sensitive Mentoring and Incubation

Entrepreneurial support for creative MSMEs must go beyond generic business training. Tailored incubation and mentoring programs should include legal advisory services, branding strategies, internationalization support, and digital scaling. These initiatives should be sensitive to cultural specificities and gender dynamics, ensuring their relevance in diverse territories and communities. Expanding incubators that specialize in symbolic production and local cultural assets is key to strengthening the resilience and competitiveness of creative enterprises. Chile's Ecosistemas Creativos program, for example, offers a replicable model by fostering regional creative networks and facilitating public-private collaboration in capacity-building.

9.5 Governance Instrument: Reinforce Cross-Sector Institutional Frameworks

The most effective policies for CCI emerge in contexts where institutions act in a coordinated and sustained manner. Establishing stable governance structures, such as permanent agencies or interministerial platforms, can ensure long-term alignment between cultural, economic, innovation and territorial development agendas. These bodies should be equipped with dedicated resources, strong political mandates and technical capabilities to lead local CCI strategies. Examples from Indonesia (BEKRAF) and Thailand (Creative Economy Agency) demonstrate how institutional integration can enhance sectoral visibility and impact, even in complex policy environments.

9.6 Equity Instrument: Integrate Gender Perspectives Across Policy Design

Despite high levels of female participation in creative industries, structural barriers persist in access to funding, leadership and market opportunities. To address these gaps, APEC economies should incorporate gender-responsive criteria from the outset of policy design. This includes collecting and analyzing disaggregated data, introducing quotas or dedicated lines of support for women-led projects and fostering female leadership through mentoring programs and business accelerators. Gender equity must be treated not as a niche issue but as a cross-cutting priority embedded within the broader ecosystem of support for creative MSMEs.

10

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ANNEXES

Annex 1:

Figure 10: Which approach do you believe is most effective for gender-inclusive support programs in the CCI sector?

Economy	Program	Focus	Years Active
Australia	<i>Creative Australia</i>	Institutional Framework	2023 - Active
Australia	<i>Business Research and Innovation Initiative (BRII)</i>	Institutional Framework, Investment and Financing, Support for Internationalization	2016 - Active
Australia	<i>Entrepreneurs' Program</i>	Encourage Entrepreneurial Recycling, Institutional Framework, Mentoring	2014 - 2023
Australia	<i>Small Business Fundamentals Program</i>	Institutional Framework, Mentoring	Unknown - Unknown
Australia	<i>The Regional Growth Fund</i>	Institutional Framework, Investment and Financing, Support for Innovation	2017 - Active
Australia	<i>Export Markets Development Grants (EMDG)</i>	Investment and Financing, Support for Internationalization	1974 - Active
Australia	<i>Industry Growth Program</i>	Investment and Financing, Support for Innovation	2023 - Active
Australia	<i>Accelerating Commercialization</i>	Incubators and Accelerators, Investment and Financing, Mentoring, Support for Innovation, Support for Internationalization	2014 - 2023
Australia	<i>Innovation Connections</i>	Incubators and Accelerators, Investment and Financing, Mentoring, Support for Innovation	2014 - 2023
Australia	<i>Enterprising ME</i>	Mentoring, Investment and Financing (with specific focus on women)	2022 - Active
Canada	<i>Regional Development Agencies (RDAs)</i>	Institutional Framework	1987 - Active

Economy	Program	Focus	Years Active
Canada	<i>Innovation Superclusters Initiative</i>	Institutional Framework, Support for Innovation	2018 - Active
Canada	<i>Creative Export Strategy</i>	Institutional Framework, Support for Internationalization, Encourage Entrepreneurial Recycling	2018 - Active
Canada	<i>Canada Small Business Financing Program (CSBFP)</i>	Investment and Financing, Improving the Regulatory and Fiscal Environment	1961 - Active
Canada	<i>Business Development Bank of Canada (BDC) Support Programs</i>	Investment and Financing, Mentoring, Encourage Entrepreneurial Recycling	1944 - Active
Canada	<i>Strategic Innovation Fund (SIF)</i>	Investment and Financing, Support for Innovation	2017 - Active
Canada	<i>CanExport Program SMEs</i>	Investment and Financing, Support for Internationalization	2016 - Active
Canada	<i>Women Entrepreneurship Strategy (WES)</i>	Investment and Financing, Mentoring, Encourage Entrepreneurial Recycling	2018 - Active
Canada	<i>Industrial Research Assistance Program (IRAP)</i>	Support for Innovation, Mentoring	1947 - Active
Canada	<i>Innovation and Skills Plan</i>	Support for Innovation, Mentoring	2017 - Active
Chile	<i>Corporation for the Promotion of Production (CORFO)</i>	Institutional Framework, Investment and Financing, Support for Innovation, Incubators and Accelerators	1939 - Active
Chile	<i>Technical Cooperation Service (SERCOTEC)</i>	Institutional Framework, Mentoring	1952 - Active
Chile	<i>Small Size Enterprise Division (DEMT)</i>	Institutional Framework, Improving the Regulatory and Fiscal Environment	Unknown - Active
Chile	<i>Executive Secretariat for Creative Economy of the Ministry of Cultures, Arts, and Heritage</i>	Institutional Framework	Unknown - Active
Chile	<i>Guarantee Fund for Small Entrepreneurs (FOGAPE)</i>	Investment and Financing	1980 - Active

Economy	Program	Focus	Years Active
Chile	<i>Guarantee Fund for Investments (FOGAIN)</i>	Investment and Financing	1980 - Active
Chile	<i>IDB Group Country Strategy with Chile (2022–2026)</i>	Investment and Financing	2022 - Active
Chile	<i>SERCOTECs Crece</i>	Mentoring	Unknown - Active
Chile	<i>Digitalize Your SME initiative</i>	Mentoring, Support for Innovation	2019 - Active
Chile	<i>Semilla Inicia</i>	Support for Innovation	Unknown - Active
Chile	<i>Semilla Expande</i>	Support for Innovation	Unknown - Active
Chile	<i>Center for the Technological Revolution in Creative Industries (CRT+IC)</i>	Support for Innovation	2019 - Active
Chile	<i>Start-Up Chile</i>	Incubators and Accelerators, Encourage Entrepreneurial Recycling	2010 - Active
Chile	<i>ChileCompra - Public Procurement Program</i>	Improving the Regulatory and Fiscal Environment	2003 - Active
Chile	<i>Bee Capital Entrepreneurship (Capital Abeja Emprende)</i>	Mentoring, Investment and Financing (with specific focus on women)	2012 - Active
Chile	<i>Seed Start (Semilla Inicia)</i>	Support for Innovation, Investment and Financing	2019 - Active
Chile	<i>Start-Up Chile</i>	Incubators and Accelerators, Encourage Entrepreneurial Recycling	2010 - Active
Chile	<i>ProChile</i>	Support for Internationalization	1974 - Active
China	<i>Maker in China SME Innovation and Entrepreneurship Global Contest</i>	Institutional Framework, Mentoring, Support for Internationalization, Incubators and Accelerators	2017 - Active

Economy	Program	Focus	Years Active
China	<i>National Financing Guarantee Fund</i>	Institutional Framework, Investment and Financing, Improving the Regulatory and Fiscal Environment	2018 - Active
China	<i>SME Technology Innovation Fund</i>	Institutional Framework, Investment and Financing, Support for Innovation	1999 - Active
China	<i>Plan for Advancing the Development of Financial Inclusion (2016–2020)</i>	Investment and Financing	2016 - 2020
China	<i>The Industrial Transformation and Upgrade Fund</i>	Support for Innovation	2016 - Active
China	<i>Made in China 2025 Initiative</i>	Support for Innovation	2015 - Active
Indonesia	<i>Ministry of Tourism and Creative Economy</i>	Institutional Framework	2011 - Active
Indonesia	<i>Ministry of Cooperatives and SMEs</i>	Institutional Framework	1947 - Active
Indonesia	<i>Creative Economy Agency (BEKRAF)</i>	Institutional Framework, Improving the Regulatory and Fiscal Environment, Support for Internationalization	2015 - 2021
Indonesia	<i>Kredit Usaha Rakyat (KUR)</i>	Institutional Framework, Investment and Financing	2007 - Active
Indonesia	<i>Center for Government Investment (Pusat Investasi Pemerintah, PIP)</i>	Institutional Framework	2006 - Active
Indonesia	<i>Revolving Fund Management Agency (LPDB)</i>	Investment and Financing	2006 - Active
Indonesia	<i>Ultra Micro Financing Program (UMi)</i>	Investment and Financing	2017 - Active
Indonesia	<i>Indonesia Startup Ecosystem (1000 Startups Digital)</i>	Mentoring, Support for Innovation, Incubators and Accelerators, Encourage Entrepreneurial Recycling	2016 - Active
Indonesia	<i>UMKM Level Up</i>	Support for Innovation	2020 - Active

Economy	Program	Focus	Years Active
Korea	<i>Ministry of SMEs and Startups (MSS)</i>	Institutional Framework, Support for Innovation	2017 - Active
Korea	<i>Small Enterprises and Marketing Services (SEMAS)</i>	Institutional Framework, Mentoring, Support for Innovation	1999 - Active
Korea	<i>Korea SMEs and Startups Agency (KOSME)</i>	Institutional Framework, Investment and Financing, Mentoring, Support for Internationalization	1979 - Active
Korea	<i>Smart Factory Initiative</i>	Institutional Framework, Support for Innovation	2014 - Active
Korea	<i>New Strategy for SMEs 2024</i>	Institutional Framework	2024 - Active
Korea	<i>Korea Small Business Institute (KOSBI)</i>	Institutional Framework	1993 - Active
Korea	<i>Korea Federation of Credit Guarantee Foundations (KOREG)</i>	Investment and Financing	1976 - Active
Korea	<i>Small Business Support Fund</i>	Investment and Financing	2009 - Active
Korea	<i>Korea Technology Finance Corporation (KIBO)</i>	Investment and Financing	1989 - Active
Korea	<i>Korea Venture Investment Corporation (KVIC)</i>	Investment and Financing	1986 - Active
Korea	<i>Jump-up Program</i>	Mentoring, Support for Innovation	2005 - Active
Korea	<i>Korea Institute of Start-up & Entrepreneurship Development (KISED)</i>	Mentoring, Support for Innovation, Incubators and Accelerators, Support for Internationalization	2008 - Active
Korea	<i>Hope Return Package</i>	Mentoring, Encourage Entrepreneurial Recycling	2013 - Active
Korea	<i>Tech Incubator Program for Startups (TIPS)</i>	Mentoring, Support for Innovation, Incubators and Accelerators, Support for Internationalization	2013 - Active
Korea	<i>Super-Gap Startup 1000+ Project</i>	Mentoring, Support for Innovation, Incubators and Accelerators	2019 - Active

Economy	Program	Focus	Years Active
Korea	<i>K-Startup Grand Challenge</i>	Incubators and Accelerators, Support for Internationalization	2016 - Active
Mexico	<i>National Institute of the Entrepreneur (INADEM)</i>	Institutional Framework, Mentoring, Support for Innovation, Incubators and Accelerators	2013 - 2019
Mexico	<i>2020–2024 Sectoral Economy Program (PROSECO)</i>	Institutional Framework, Improving the Regulatory and Fiscal Environment	2020 - Active
Mexico	<i>Support Fund for Micro, Small, and Medium Enterprises (Fondo PyME)</i>	Investment and Financing	2004 - Active
Mexico	<i>National Microenterprise Financing Program (PRONAFIM)</i>	Investment and Financing	2001 - Active
Mexico	<i>Financing for Women Entrepreneurs (Fondeso)</i>	Mentoring, Investment and Financing (with specific focus on women)	2019 - Active
Mexico	<i>MIPYMESMX (Digital Platform)</i>	Support for Innovation, Mentoring	Unknown - Active
Mexico	<i>Alliance for the Digital Transformation of MSMEs</i>	Support for Innovation, Mentoring	2024 - Active
Mexico	<i>National Fund for Culture and the Arts (FONCA)</i>	Institutional Framework, Investment and Financing	1989 - Active
Mexico	<i>Women MSMEs (Mujer Pyme)</i>	Mentoring, Investment and Financing (with specific focus on women)	2016 - Active
Mexico	<i>Let's Grow Together (Crecamos Juntas)</i>	Mentoring (with specific focus on women)	2018 - Active
Peru	<i>Ministry of Production (Produce)</i>	Institutional Framework	2002 - Active
Peru	<i>Impulso MyPerú</i>	Institutional Framework, Investment and Financing	2021 - Active
Peru	<i>National Culture Policy to 2030</i>	Institutional Framework	2020 - 2030

Economy	Program	Focus	Years Active
Peru	<i>National Program for Technological Development and Innovation (ProInnovate)</i>	Institutional Framework, Support for Innovation	2020 - Active
Peru	<i>FAE MYPE</i>	Investment and Financing	2020 - Active
Peru	<i>Creceer Fund</i>	Investment and Financing	2018 - Active
Peru	<i>Startup Perú</i>	Mentoring, Incubators and Accelerators	2013 - Active
Peru	<i>Reactiva Perú</i>	Improving the Regulatory and Fiscal Environment	2020 - 2021
Peru	<i>National Women Entrepreneur Program (PRONAME)</i>	Mentoring, Investment and Financing (with specific focus on women)	2023 - Active
Singapore	<i>Smart Nation Initiative</i>	Institutional Framework	2014 - Active
Singapore	<i>Go-Business e-Adviser for Government Assistance</i>	Institutional Framework	2019 - Active
Singapore	<i>Go-Business Licensing</i>	Improving the Regulatory and Fiscal Environment, Institutional Framework	2019 - Active
Singapore	<i>Our SG Arts Plan (2023–2027)</i>	Institutional Framework, Support for Innovation	2023 - 2027
Singapore	<i>Enterprise Development Grant (EDG)</i>	Investment and Financing	2018 - Active
Singapore	<i>Enterprise Financing Scheme (EFS)</i>	Investment and Financing	2019 - Active
Singapore	<i>Productivity Solutions Grant (PSG)</i>	Investment and Financing	2018 - Active
Singapore	<i>SMEs Go Digital Programme</i>	Mentoring, Support for Innovation	2017 - Active
Singapore	<i>Startup SG Programmes</i>	Mentoring, Incubators and Accelerators	2017 - Active
Singapore	<i>Enterprise Leadership for Transformation (ELT)</i>	Mentoring	2020 - Active
Singapore	<i>PACT Programme</i>	Support for Innovation	2010 - Active
Singapore	<i>SkillsFuture Enterprise Credit (SFEC)</i>	Improving the Regulatory and Fiscal Environment	2020 - Active

Economy	Program	Focus	Years Active
Thailand	<i>Office of Small and Medium Enterprises Promotion (OSMEP)</i>	Institutional Framework	2000 - Active
Thailand	<i>SMEs One-Stop Service Centers (OSS)</i>	Improving the Regulatory and Fiscal Environment, Institutional Framework	2002 - Active
Thailand	<i>Creative Economy Agency (CEA)</i>	Institutional Framework	2018 - Active
Thailand	<i>Thai Credit Guarantee Corporation (TCG)</i>	Investment and Financing	1991 - Active
Thailand	<i>SME Development Fund</i>	Investment and Financing	2002 - Active
Thailand	<i>Ignite Thailand Credit Program</i>	Investment and Financing	2020 - Active
Thailand	<i>Business Development Service (BDS) Voucher Scheme</i>	Mentoring	2015 - Active
Thailand	<i>WE RISE Together</i>	Mentoring	2019 - Active
Thailand	<i>Digital Solutions and E-Commerce Platforms</i>	Support for Innovation	2016 - Active
Thailand	<i>Creative Industries Development Fund (CIDF)</i>	Support for Innovation, Incubators and Accelerators	2018 - Active
Thailand	<i>Made in Thailand (MiT)</i>	Support for Internationalization	2015 - Active

Source: Prepared by the project team under the APEC DESG 203 2023A initiative.

Annex 2:

In-Depth Interview Questionnaire (Original Language)

Instructions:

This survey is part of the DESG 203 2023A – Sharing Best Policy Practices to Develop and Promote MSMEs Access to Digital Cultural and Creative Industries project, led by APEC. The project aims to identify and disseminate best policy practices that enhance the development of MSMEs in digital cultural and creative industries, with a special focus on women's participation.

By gathering insights from experts across different economies, this survey aims to assess how various policy frameworks, initiatives, and support mechanisms align with shared learnings to foster MSME growth and resilience. The results will inform an APEC publication featuring case studies, best practices, and policy recommendations.

Cultural and Creative Industries

1. What definition of Cultural and Creative Industries (CCIs) is used in your economy, and what key distinctions set it apart from other definitions?

Public Policies

2. What key programs or policy instruments are in place to support creative MSMEs in your economy, and what evaluation mechanisms are used to assess their impact?

Digital and Creative Industries

3. How are digital industries distinguished from creative industries in your economy, and how can they be integrated into policy frameworks to strengthen MSMEs?

Support Mechanisms

4. In terms of public policy support, do you consider direct financial assistance to be the most critical factor for the success of creative MSMEs, or are there alternative support mechanisms with equal or greater impact?

Intellectual Property

5. From your experience, what has been the most effective approach to promoting intellectual property (IP) management among creative MSMEs: a rights-protection focus or a business and monetization-driven strategy? Could you highlight any particularly successful policy initiatives in this area?

Women's Participation

6. How significant is women's participation in your economy's creative sector for the formulation and implementation of public policies?

Annex 3:

Transcripts of In-Depth Expert Interviews in Their Original Language.

https://docs.google.com/document/d/1-yI05v09JbMBDwfKQGAeTjBdNvwAm6_yKoKGZwqEy-w/edit?usp=sharing

Annex 4:

Survey Instrument for Assessing the Impact of Cultural and Creative Industries (CCIs) on Micro, Small, and Medium Enterprises (MSMEs)

Instructions

This survey is part of a research project by APEC to explore how cultural and creative industries (CCIs) can drive the growth and resilience of micro, small, and medium enterprises (MSMEs) across APEC economies. This study focuses on the needs, challenges, and opportunities of MSMEs in adopting CCIs. We invite you to contribute to this initiative by completing the following online questionnaire, which should take approximately 15 minutes.

Your responses will be treated with strict confidentiality, and findings will be reported anonymously. There are no right or wrong answers; we value your candid insights.

Thank you for your participation and for sharing your valuable perspectives on this important topic.

General Information

1. Do you consent to participate in this study?
 - Yes
 - No
2. Full Name
 - Open Text Field
3. Gender
 - Female
 - Male
 - Prefer Not to Say
4. Which APEC economy do you belong to?
 - Australia
 - Brunei Darussalam
 - Canada
 - Chile
 - People's Republic of China (also China)
 - Hong Kong, China
 - Indonesia
 - Japan
 - Republic of Korea
 - Malaysia
 - Mexico
 - New Zealand
 - Papua New Guinea
 - Peru
 - The Republic of the Philippines (Also the Philippines)
 - The Russian Federation
 - Singapore
 - Chinese Taipei
 - Thailand
 - United States
 - Viet Nam
5. Institutional Affiliation
 - Open Text Field
6. Which sector best describes your affiliation?
 - Public
 - Private
 - Civil Society

Community and Local Economic Impact

7. How present are CCIs in the development of the MSME sector in the APEC economy you belong to?
 - Highly present
 - Moderately present
 - Slightly present
 - Not present
8. Which sectors of the APEC economy you belong to benefit most from the contributions of CCIs?
 - Tourism and hospitality
 - Technology and digital services
 - Manufacturing and design
 - Education and training
 - Media and entertainment
 - Arts and culture
 - Other(s)
9. How important is the integration of CCIs for MSMEs to develop innovative products and differentiate themselves in competitive markets?
 - Very important
 - Moderately important
 - Slightly important
 - Not important
10. How frequently does the APEC economy you belong to participate in collaborative initiatives to expand the reach of its creative industries?
 - Very frequently
 - Frequently
 - Occasionally
 - Rarely
 - Never

Core Challenges and Priorities for CCIs

11. What are the most pressing topics for CCIs?
 - Access to finance
 - Intellectual Property Rights (IPR)
 - Sustainability
 - Digitalisation
 - Skills
 - Innovation
 - Internationalization
 - Networking
 - Other(s)
12. What are the most critical issues for MSMEs in the CCIs sector?
 - Limited guidance on business strategies and financial planning
 - Restricted access to financing for growth and innovation
 - High operational costs
 - Insufficient support for R&D and competitive innovation
 - Regulatory complexity and high tax burdens
13. What are the main challenges for CCIs in terms of digitalization?
 - Limited opportunities for international market expansion
 - Reduced adaptability due to limited ecosystem resource-sharing
 - Intellectual property rights
 - Implementation costs
 - Financial resources
 - Lack of skills
 - Lack of information
 - Compliance with legislation
 - Ethics concerns
 - Time of implementation
 - Other(s)
14. What do you consider the most significant barriers to growth and resilience for MSMEs in the cultural and creative industries within your economy?

- Limited access to finance
- Regulatory constraints
- Shortage of specialized talent
- Lack of networking opportunities
- Inadequate digital infrastructure
- Other(s)

Technological Advancements and Skill Development Needs

15. What advanced technologies do you consider most important for the competitiveness of CCIs?

- Artificial intelligence
- Cloud computing
- Immersive virtual reality
- Blockchain
- 3D and 4D printing
- Virtual worlds
- Robotics
- Other(s)

16. Which skills would you consider most relevant to strengthen?

- Entrepreneurial skills
- Networking and internationalization
- Production/technical skills

- Digital skills
- Legal knowledge
- Creative skills
- Green skills
- Management skills
- Other(s)

17. On which topics would you like to further your knowledge?

- APEC CCIs-related funding programmes
- Financial instruments
- Access to financing networks
- Applications for funding
- Financial management
- Financial communication
- Other(s)

Public Policy and MSME Development

18. How important is the integration of CCIs in the design of public policies for MSMEs development?

- Very relevant
- Moderately relevant
- Slightly relevant
- Not relevant

19. In your opinion, which approach is more effective for supporting MSMEs in the CCI sector?

- Designing targeted policies specifically for MSMEs in the CCI sector
- Developing policies that strengthen various areas (e.g., finance, digital skills, networking) and provide transferable tools for

MSMEs across sectors

- A combination of specific CCI policies and generalized MSME support programs
- Other(s)

20. How important are the following strategies for integrating CCIs into MSME development policies? (Rate each item from 1 to 5, where 1 is "Not Important" and 5 is "Extremely Important.")

Recognizing the Economic Value of CCIs: Highlighting their impact on jobs, innovation, and culture.

- a. Digital & Tech Support: Providing CCIs with tools like streaming, ecommerce, and AR/VR.

- b.** R&D and Innovation Support: Promoting partnerships and R&D for CCI innovation.
 - c.** Skills Development: Offering digital skills training and mentorship for CCIs.
 - d.** Flexible Financing: Adapting financing options to CCIs unique needs.
 - e.** Promoting International Reach: Helping CCIs access global markets.
 - f.** Integration with the Digital Economy: Positioning CCIs within digital economy policies.
 - g.** Institutional Support: Establishing agencies dedicated to CCIs.
 - Options for each item:
 - Not Important
 - Slightly Important
 - Moderately Important
 - Very Important
 - Extremely Important
- 21.** Which approach do you believe is most effective for gender-inclusive

support programs in the CCI sector?

- Programs designed exclusively for women
 - General programs with a required percentage of female participants
 - General programs with a dedicated version for women
 - General programs with no gender-specific configuration
 - Other(s)
- 22.** How do APEC economies measure the cultural, social, and economic impact of its creative industry policies?
- Through regular impact assessments and reporting
 - Using specific indicators for cultural, social, and economic outcomes
 - Conducting periodic reviews based on qualitative and quantitative data
 - Partnering with external organizations or experts for impact evaluation
 - Other(s)

https://drive.google.com/file/d/1_aYmb4H40wnA2rp3MuB1CQ_DgaW5F3Gj/view?usp=sharing

Annex 5:

Workshop Transcript – APEC World Cafe Session

Expert Participants

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Workshop Materials

Full Session Transcript:

https://docs.google.com/document/d/1AH5FAIFlxP_-4MclfVmZtTAGTVsW1yU-uOt36qtZKjl/edit?usp=sharing

Video Recording:

<https://youtu.be/XHcLhevz-SE>



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