Atana Index Vol. 1.3 — Two Creative Time Zones (fig8 self-audit refresh)

Latin America's Cultural Economies in the Agentic Era

An executive briefing for cultural, economic, and trade policymakers across the region — built on UNCTAD 2024 trade data, OECD AI projections, the Atana AI Exposure × Readiness Index, and validated by the 2026 IFPI Global Music Report and Spotify Loud & Clear.

Atana — evidence-based AI policy for creative economies in Latin America.

Executive Summary

Six findings.

1. **Latin America starts behind.** Projected enterprise AI adoption in 2034 is 2–10% in LATAM versus 30–60% in OECD frontier economies (OECD, 2026). The annual income gain from AI is projected at 0.03–0.20 percentage points for LATAM versus 0.4–1.2 p.p. for adopters.
2. **Governance is the binding constraint.** Latin America posts the lowest responsible-AI maturity score globally (2.2/4.0; McKinsey 2026). Only 23% of regional organizations meet level 3 on AI agent governance, against 41% in Asia-Pacific.
3. **The region operates in two creative time zones.** A digital-services bloc (Brazil, Costa Rica, Uruguay, Colombia) faces direct AI displacement risk. An artisanal-goods bloc (Bolivia, Peru, Honduras, Guatemala) faces a quieter risk: exclusion from agent-mediated discovery channels.
4. **Authenticity becomes the scarcest input.** As generic creative content commoditizes toward zero marginal cost, what cannot be replicated by machines — territorial identity, lived heritage, embodied performance — gains value. Latin America has these assets in abundance and undervalues them in its current trade and policy posture.
5. **The window is three to five years.** Frontier countries are setting the rules of agent-mediated cultural commerce now. The cost of catching up after consolidation is structurally higher than the cost of acting before it.
6. **The thesis is already being validated empirically.** The 2026 IFPI Global Music Report and Spotify Loud & Clear show Latin America as the fastest-growing recorded-music region globally (+17.1% YoY in 2025), Brazil now #8 worldwide (+14.1%), and Brazilian Funk as the single fastest-growing $50M+ genre on Spotify (+36% YoY). Zone 1's high digital exposure is also Zone 1's growth engine — exactly the asymmetry the framework predicted.

The remainder of this briefing translates these findings into the Atana Strategic Quadrant Map and four concrete policy lines decision-makers can put into motion this calendar year.

01 — The Agentic Inflection

From advice to action.

Until 2024, most organizations used AI instrumentally — tools that accelerated existing tasks. From 2025 onward, the inflection becomes qualitative. Agentic systems no longer only advise; they act. They issue autonomous recommendations, trigger actions, interact with other systems, and coordinate end-to-end workflows without continuous human intervention.

For the creative economy, the transition is structurally disruptive for two reasons.

Generic creative content commoditizes toward zero

AI agents can produce text, images, music, and design at near-zero marginal cost. The market for functional content — produced to fulfill a standardized demand — enters accelerated price deflation. The OECD estimates total productivity gains of up to 8–9% over ten years in publishing and audiovisual, which translates into equivalent global price compression.

Cultural intermediaries face the Coasian Singularity

Ronald Coase showed that firms and markets exist because coordination and transaction have costs. When AI agents reduce those costs to near zero — searching, comparing, negotiating, delivering — intermediaries who lived by managing that friction lose their reason to be. Galleries, distributors, publishers, licensing agencies: business models anchored in transaction costs that AI is now compressing.

What this means for cultural policy

AI does not destroy creative value. It redistributes it — moving value from those who managed friction toward those who control the customer interface, the behavioral data, or the capacity to orchestrate ecosystems. Cultural policy that focuses only on production support, without addressing distribution and orchestration, will protect the wrong link in the chain.

The Global Creative Economy Council, in its April 2026 *Global AI Agenda for the Cultural and Creative Industries* (Creative PEC / British Council), frames these dynamics as 11 principle-level actions structured around skills, IP, infrastructure, and international cooperation. This briefing takes those principles as a global floor and proposes four LATAM-specific operational lines that fit current regulatory authority.

02 — Where Latin America Stands

The starting position is unforgiving.

The OECD models AI adoption along an S-curve, anchored in the historical patterns of general-purpose technologies. Applied to Latin America, the model is unforgiving.

Adoption gap

Group	Projected enterprise AI adoption (2034)

Frontier (US, Ireland, Israel, Korea)	**30 – 60%**
Developed Europe	20 – 40%
Latin America (Mexico, Colombia)	2 – 10%

Source: OECD AI Papers No. 57, Filippucci et al. (2026), Fig. 4.

Governance gap

Region	Maturity 2025	2026
Asia-Pacific	2.2	2.5
Europe	2.0	2.3
North America	2.1	2.2
Latin America	1.8	2.2

Source: McKinsey AI Trust Maturity Survey 2026 (n = 496; LATAM sub-sample = 43).

On the specific dimension of AI agent governance, only 23% of LATAM organizations reach level 3 or above, against 41% in Asia-Pacific. This is a structural barrier to capturing the technological spillovers that make AI a regional growth engine elsewhere.

03 — Two Creative Time Zones

A bifurcated region.

UNCTAD 2024 data, read against OECD adoption projections, reveals that Latin America's creative economy operates in two structurally distinct time zones. They face different risks, different opportunities, and require different policy responses.

Zone 1 — High Digital Exposure

Brazil, Colombia, Costa Rica, Uruguay. These economies export predominantly digital creative services — software, audiovisual, advertising, publishing — and have relatively high capacity for technological absorption. They are simultaneously the most exposed to AI competitive pressure and the best positioned to capture productivity gains if they adopt fast.

Country	Services exports (2024, US$ B)	Services share	Atana Readiness
Brazil	7.2	84%	84
Costa Rica	0.51	97%	74
Uruguay	0.60	98%	73
Colombia	1.28	75%	69

Zone 2 — Concentrated Artisanal Goods

Bolivia, Peru, Honduras, Dominican Republic, Guatemala, El Salvador, Paraguay. These economies export predominantly physical goods — jewelry, textiles, handicraft — with

very low direct AI substitution risk (jewelry and textile sectors show less than 2% projected total productivity gain).

The risk here is more subtle. A Bolivian silver necklace cannot be generated by an algorithm. But if global buyers use AI agents to discover, evaluate, and acquire cultural products, and those agents work from databases in which Bolivian or Peruvian artisans are not present, verified, or ranked — the physical product simply ceases to be findable.

The HHI warning

Bolivia (HHI = 0.994, 98% jewelry concentration), Dominican Republic (HHI = 0.982, 90% jewelry), and Paraguay (99% craft goods) show extreme export concentration. This amplifies risk of sectoral shocks — including the entry of digitally generated 'aesthetic jewelry' produced industrially as a low-price competitor.

04 — The Authenticity Paradox

As content becomes cheap, identity becomes scarce.

There is a contradiction at the center of the AI era that most economic analyses fail to capture.

As AI agents produce generic creative content at industrial scale, scarcity shifts from content to authenticity. What cannot be replicated by algorithms acquires value: specific cultural identity, living memory, the body as instrument, territory as inspiration.

For Latin America's creative economies, these assets exist — and are systematically undervalued and under-digitized.

- **Brazil.** One of the world's largest cultural diversities, with internationally recognized music, graphic design, and audiovisual production.
- **Mexico.** Handicraft with unique aesthetic grammars, industrial design with Mesoamerican identity, the largest Spanish-language content market in the world.
- **Peru.** Textile jewelry with centuries of design tradition; viable candidate for cultural Protected Designation of Origin status.
- **Bolivia, Guatemala, Honduras.** Textiles with irreplaceable regional identities — and high vulnerability to digital design-washing.

The problem is not the absence of cultural value. It is the inability to position that value within AI-mediated ecosystems. As product discovery migrates from traditional search to agents that curate, recommend, and negotiate autonomously, producers who are not digitally indexed and verifiable simply disappear from the market.

05 — Music: the agentic-era validation

The thesis is being confirmed in real time.

Three months after Atana Index Vol. 1 went to print, the 2026 cycle of music-industry releases — IFPI Global Music Report 2026 and Spotify Loud & Clear 2026 — delivered the

most unusual outcome any framework can hope for: empirical confirmation within its own publication window. The Two Creative Time Zones thesis predicted that Zone 1 economies, services-led and AI-exposed, would either accelerate or fall behind depending on whether they could convert that exposure into capture. The 2025 data shows them accelerating, and Latin America as a region is the fastest-growing on Earth.

Indicator (2025 data)	Value	What it confirms
LATAM recorded-music growth, 2025	**+17.1% YoY**	Fastest of any region globally; 16th consecutive year of growth
LATAM streaming share of revenue	**88.1%**	Highest streaming dependence of any region — Zone 1's defining structural feature
Brazil global ranking	**#8** (+14.1% YoY)	Up from #9; Mexico moves to #10 (+13.3%). The Readiness Index leaders are the empirical winners.
Brazilian Funk on Spotify ($50M+ tier)	**+36% YoY**	Single fastest-growing genre globally; Latin Trap +29%, Reggaeton +24%. The Authenticity Paradox, made measurable.
New $100K Spotify earners outside US	**85%** of new earners	Songs in 16 languages in Spotify Global Top 50 (vs 8 in 2020). Globalisation of music is now the present, not the projection.

Read alongside §3 (Two Creative Time Zones) and §4 (Authenticity Paradox), the 2026 music data does two things at once: it confirms that Zone 1's high digital exposure is also Zone 1's growth engine, and it illustrates the authenticity paradox in concrete form. Brazilian Funk being the single fastest-growing $50-million-plus genre on Spotify globally is precisely the empirical pattern the framework predicted — cultural specificity, rooted in territory and language, gains scarcity value as generic content commoditizes toward zero marginal cost.

What this means for policy

For Zone 1 ministries, the upside is real and already materialising — but capture depends on AI adoption inside the cultural sector itself, paired with the IP and creator-data protections that travel with the work to international markets. For Zone 2 ministries, the music data is not the comparable benchmark; the bottleneck for handicraft and textile economies is digital discovery infrastructure, not streaming uptake. The 2026 release of

OBITEL Anuario Iberoamericano (pending) is expected to extend this analysis to LATAM audiovisual production; v1.2 of this Index will fold it in.

06 — The Atana Strategic Quadrant Map

Four positions, four playbooks.

The 15 mapped countries distribute across four quadrants defined by two indices derived from UNCTAD 2024 data: the AI Exposure Index (X axis) and the Readiness Index (Y axis). Cut points are 40% on both axes.

These quadrants describe statistical situations in 2024 — they do not prescribe development trajectories or future positioning. Q1 is not the destination Q4 countries "should" reach; the quadrants name distinct starting points, each with its own playbook (§7). A full methodological review of the framework's strengths and limits is on file as an internal audit and available on request.

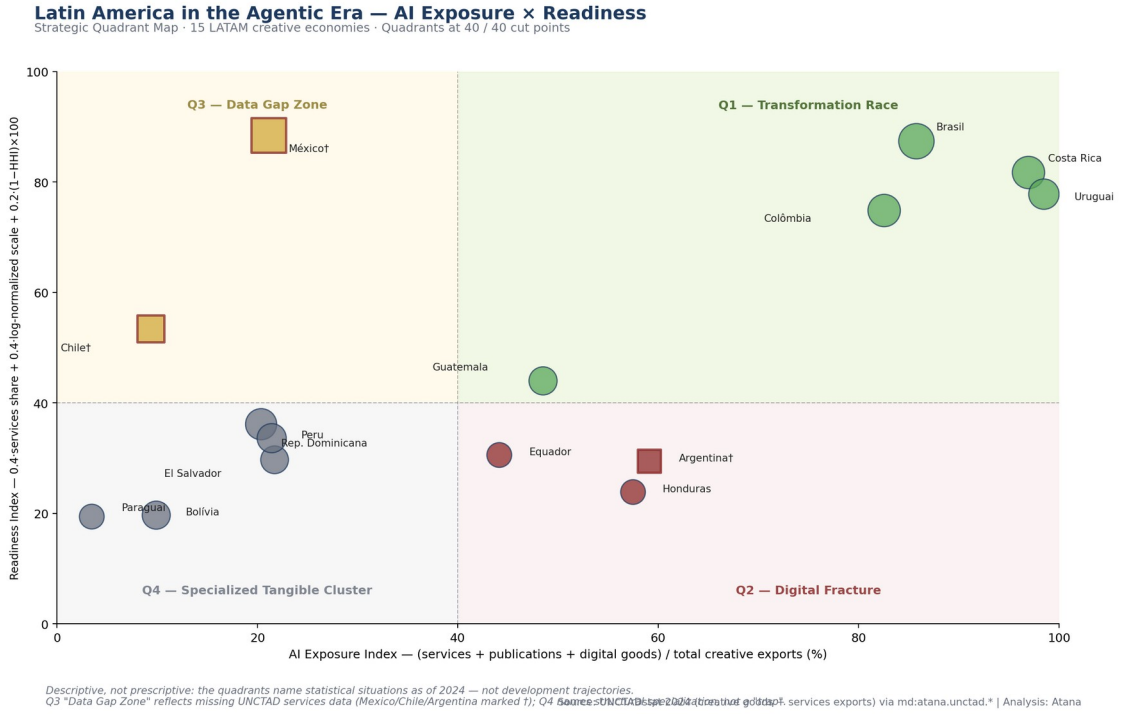


Figure 1 — The Atana Strategic Quadrant Map. 15 LATAM countries by AI Exposure Index (X) and Readiness Index (Y). Bubble size = total creative exports, 2024. Source: UNCTADstat, Atana indices. The quadrants describe situations, not trajectories. Q3 names a UNCTAD-reporting gap, not a positive finding. Q4 holds the strongest cards for the Authenticity Paradox playbook (§4, §7).

The four quadrants

Quadrant I

Transformation Race

Brazil · Colombia · Costa Rica · Uruguay

The most exposed economies are also the best positioned to win the agentic transition — if they move fast. The OECD is unambiguous: countries cannot wait for foreign productivity gains without domestic adoption.

Quadrant II

Digital Fracture

Honduras · Guatemala · Ecuador · Argentina†

Strategically the most concerning: high disruption exposure combined with low absorption capacity. Small creative-service exporters risk being substituted by global content-generation platforms before they can consolidate.

Quadrant III

Data Gap Zone

Mexico†

Q3 isolates a structural data gap, not a positive finding. Mexico appears here alone because UNCTAD does not report its creative services; its X-axis position is a lower bound computed on goods only. If services data were reported, Mexico likely migrates to Q1. The quadrant is named for what it is — a reporting gap — rather than for an empirical category.

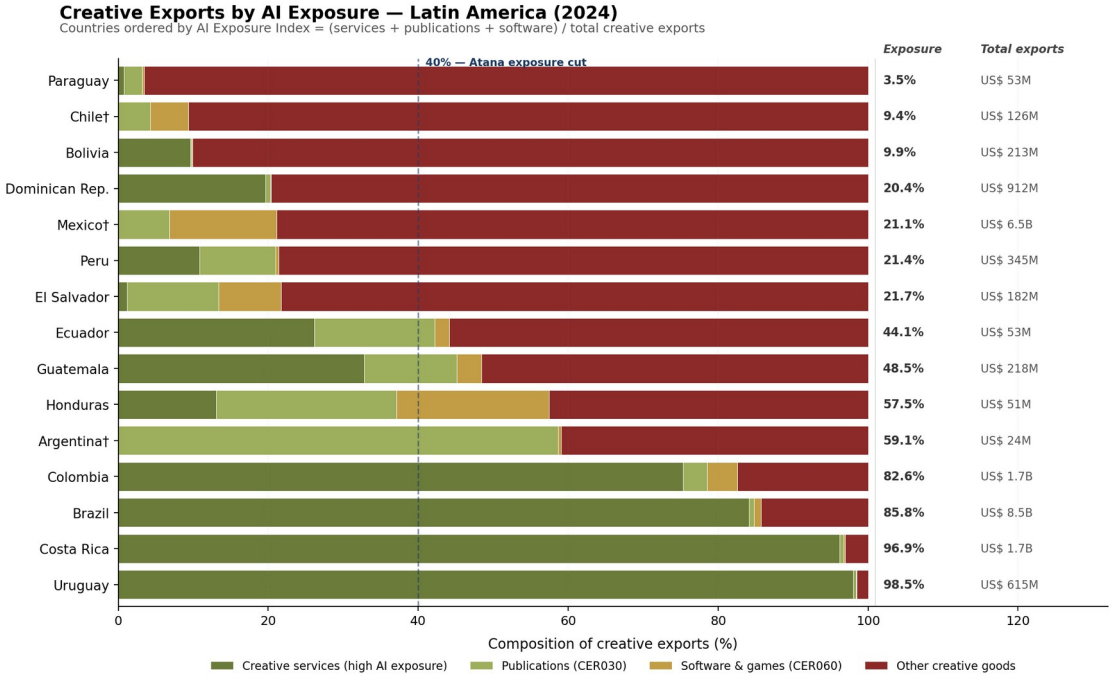
Quadrant IV

Specialized Tangible Cluster

El Salvador · Peru · Dom. Rep. · Chile† · Bolivia · Paraguay

Predominantly physical creative exports — jewelry, textiles, handicraft — with concentrated production clusters of recognized international identity. AI does not directly substitute these; on the contrary, the Authenticity Paradox (§4) suggests their territorial specificity gains scarcity value as generic content commoditizes. The risk is narrower and specific: as discovery and curation migrate to agents, artisanal producers without verifiable digital presence become invisible. These countries hold the strongest cards for Strategic Bet 2 (Authenticity Certification), not for migration toward Q1.

Composition of creative exports by AI exposure



Source: UNCTADstat 2024 (creative goods + services exports) · Atana indices (Two Creative Time Zones framework) · atana.studio
† Mexico, Chile, Argentina — creative-services data not reported in UNCTAD 2024 (exposure shown is lower bound on goods only).

Figure 2 — Composition of creative exports by country and category, ordered by AI Exposure Index. Source: UNCTADstat 2024; Atana indices.

Concentration risk (HHI)

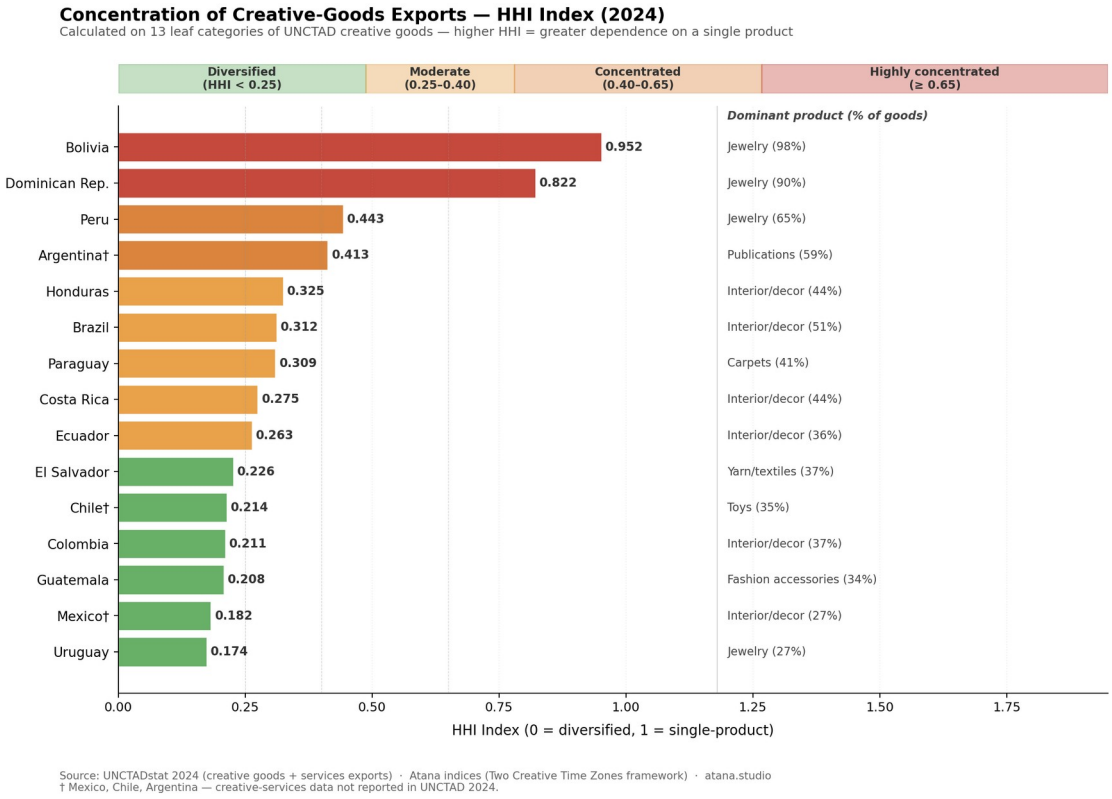


Figure 3 — Herfindahl–Hirschman concentration index (HHI) on 13 leaf categories of creative exports. Higher HHI = greater single-product dependence. Source: UNCTADstat 2024.

07 — Three Strategic Bets

Mapped to country positions.

Bet 1 — Urgent Domestic Adoption (Zone 1 countries)

For Brazil, Colombia, Costa Rica, Uruguay, and Mexico (probable Q1), domestic adoption is now condition-precedent for export competitiveness. Cultural-sector priority: AI deployment in production and distribution — not only administration — combined with simultaneous investment in AI governance. Intellectual-property risk is binding: 51% of organizations rate IP infringement as highly relevant.

Bet 2 — Digital Authenticity Certification (Zone 2 countries)

For Peru, Bolivia, Guatemala, Honduras, the path is not to compete on digital services. It is to become irreplaceable within AI ecosystems. Three components: **verifiable indexing** (structured digital presence in formats agents can read); **provenance certification** (the cultural equivalent of geographic indications for wine and cheese); **differentiation narrative** (the artisan's story is the asset that gains value with use).

Bet 3 — Governance as Competitive Advantage (cross-cutting)

McKinsey's 2026 finding that AI trust is increasingly perceived as a business enabler rather than a compliance cost has direct implications. Building responsible-AI governance — IP protection, data protection, traditional-knowledge safeguards — is not only risk management; it is the entry condition for international markets that will demand evidence of responsible AI in their creative supply chains.

08 — Four Policy Lines

Deployable this calendar year.

The agentic era requires cultural policy to evolve from a posture focused on protection and production support toward one that integrates competitiveness and positioning within AI-mediated ecosystems. Four concrete lines emerge from the analysis. None requires a new ministry. All are deployable within current regulatory authority in most LATAM jurisdictions.

These four lines operationalize, for Latin American jurisdictions, principles consistent with the 11 actions of the GCEC *Global AI Agenda* (Creative PEC / British Council, 2026). Cross-walk: Atana 1 ↔ GCEC 7 · 4 · 5 | Atana 2 ↔ GCEC 5 · 4 · 11 | Atana 3 ↔ GCEC 1 · 2 | Atana 4 ↔ GCEC 3 · 6 · 9.

Policy line 1

Digital infrastructure for cultural identity

Build national catalog, verification, and indexing systems for cultural goods and creators in formats readable by AI agents — analogous to what the geographic-indications registry already does for agri-food products. *Owner:* ministry of culture in cooperation with intellectual-property authority. *Time to first deployment:* 12–18 months. *Estimated cost:* USD 3–8M.

Policy line 2

Traditional-knowledge protection in the AI context

Explicit regulation on the use of traditional cultural expressions in AI model training, with compensation mechanisms for community holders. Build on existing UNESCO and WIPO frameworks. *Owner:* ministry of culture and indigenous-affairs authority. *Time to first regulatory draft:* 6–12 months.

Policy line 3

AI literacy for creative workers

Programs that go beyond tool use to cover how agentic ecosystems work, how cultural products are discovered and ranked by agents, and how to build verifiable digital presence. *Owner:* ministry of culture in cooperation with labor and education ministries. *Pilot scale:* 5,000 creators in year 1. *Estimated cost:* USD 1.5–4M per pilot cohort.

Policy line 4

Responsible-AI maturity inside cultural-sector funding

Progressive integration of AI governance criteria into credit lines and cultural-industry support — particularly IP protection and creator-data protection. *Owner:* cultural-financing institutions in coordination with culture ministry. *Time to first credit line update:* 6–9 months.

09 — Methodology

Reproducible, open, citable.

Sources

- **UNCTADstat.** Creative goods (US_CreativeGoodsValue) and creative services (US_CreativeServ_Indiv_Tot), 2024, USD current, partner = World, flow = exports.
- **OECD AI Papers No. 57.** Filippucci et al. (2026), "AI meets trade." Adoption projections, productivity-gain estimates, three-channel transmission framework.
- **McKinsey 2026 publications.** AI Trust Maturity Survey (n = 496); "Where AI will create value — and where it won't"; "The rise of the human–AI workforce."
- **IFPI Global Music Report 2026** (covering 2025 data). LATAM regional growth, streaming share, country rankings. Used in §5 (v1.1 refresh).
- **Spotify Loud & Clear 2026** (covering 2025 data). Artist-earnings tiers, genre growth on the $50M+ list, language diversity on the Global Top 50. Used in §5 (v1.1 refresh).
- **GCEC (Creative PEC / British Council, 2026).** "A Global AI Agenda for the Cultural and Creative Industries." DOI: 10.5281/zenodo.19333828. Used in §1 and §8 as the global principle-level frame against which Atana's four LATAM-operational lines are positioned.

Version history

- **v1.0** — 2026-05-10. Initial publication. UNCTAD 2024 + OECD AI Papers No. 57 + McKinsey 2026.
- **v1.1** — 2026-05-14. Music-sector refresh. Adds §5 (empirical validation) integrating IFPI 2026 and Spotify Loud & Clear 2026; renumbers original §5–§8 to §6–§9; adds sixth finding to executive summary.
- **v1.2** — 2026-05-15. English-language regeneration of figures 3, 8, and 9. Adds GCEC *Global AI Agenda* (April 2026) as a reference point in §1, §8, and §9. Charts and underlying data unchanged.
- **v1.3** — 2026-05-16. Fig8 self-audit refresh. Q3 "Latent Power" → "Data Gap Zone" (the quadrant is named for what it is: a UNCTAD reporting gap, not a positive finding). Q4 "Artisanal Trap" → "Specialized Tangible Cluster" (removes a normative load that contradicted §4's Authenticity Paradox). Adds descriptive-not-prescriptive disclaimer to §6. Underlying data and country positions unchanged; the country-by-country argument is unaffected. Full audit on file (REVIEW_2026-W20_fig8_quadrant_map.md).

Index definitions

- **AI Exposure Index.** (Creative services + digital goods CER010+CER060 + publications CER030) ÷ total creative exports. For countries with unreported services: lower bound = (digital goods + publications) ÷ total goods.
- **Readiness Index.** 0.40 × services share + 0.40 × log-normalized scale (min = AR US$ 24M, max = BR US$ 8.55B) + 0.20 × (1 − HHI) × 100. Without services: 0.50 × scale + 0.50 × diversification.

Caveats

- OECD adoption projections for LATAM are entirely modeled (not survey-based), per OECD's own note 52.
- McKinsey LATAM responsible-AI maturity scores are based on 43 organizations within the n = 496 global sample.
- Mexico, Chile, and Argentina lack reported creative-services data in UNCTAD 2024. Their exposure and readiness in the Atana Quadrant are calculated on digital goods only and are explicitly marked as lower bounds.

AtanaIndex

Atana is a specialized policy advisory practice for the creative economies of Latin America — built on original microdata, two proprietary frameworks, and decade-long depth in the region's cultural-policy infrastructure.

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