



Development of a Regional Export Strategy for the Creative Industries Services

Value Chain Analysis Report: PAINTING (VISUAL ARTS)

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TABLE OF CONTENTS

List of Acronyms.....	4
1. Introduction	5
1.1. Definition of Value Chains	5
1.2. Sectoral Scope: CARIFORUM Painting - Services and Goods.....	6
1.3. Geographical Scope: CARIFORUM and European Union.....	7
1.4. Methodology	7
2. Mapping the Value Chains for CARIFORUM CCI's.....	8
3. Market Opportunities for CARIFORUM's Painting (Visual Arts Sector)	9
3.1. Trends in the EU for Painting	9
3.2. Trends in CARIFORUM for Painting	9
3.2.1 Overview of CARIFORUM Painting Industry	9
3.2.2 Characteristics of CARIFORUM Painting professionals.....	10
3.2.3 Current export activities of CARIFORUM Painting professionals	12
3.2.4 Export support framework for CARIFORUM Painting professionals	17
4. Bottlenecks along the Paintings (Visual Arts) Value Chain	18
4.1. Export challenges facing CARIFORUM Painting professionals	18
4.2. Challenges within EU for CARIFORUM Painting.....	21
5. Recommendations to Boost Export of CARIFORUM Painting	22
5.1. Improving export support for CARIFORUM Painting professionals.....	22
5.2. Good practice in the EU Member States for Painting	27
5.3. Scope for business cooperation between the EU and CARIFORUM for Painting	27
5.4. Image and Reputation of CARIFORUM CCI's	27
5.5. Structural relations and networks.....	27
5.6. Expand commercial activities.....	28
Annex 1: Details of Survey Respondents – Painting.....	30
Annex 2: List of Stakeholders Consulted for Paintings and Visual Arts in EU Member States	31
Annex 3: Key EU Stakeholders for CARIFORUM's Painting Industry.....	32



LIST OF FIGURES

Figure 1: Basic Creative Chain	5
Figure 2: Mapping of respondents along Value Chain for CARIFORUM Painting	11
Figure 3: Company age range for CARIFORUM Painting respondents	12
Figure 4: Comparison of total and export sales for CARIFORUM Painting respondents	13
Figure 5: Most important export modes for CARIFORUM Painting professionals	14
Figure 6: Prevalence of exports to CARIFORUM, EU and other markets by CARIFORUM Painting professionals	15
Figure 7: Sources of support used by CARIFORUM Painting professionals for their export activities.....	17
Figure 8: Most important export challenges facing CARIFORUM Painting professionals	19
Figure 9: Experience of CARIFORUM Painting professionals to access export financing	20
Figure 10: Prioritisation of export services by CARIFORUM Painting professionals.....	23
Figure 11: Willingness of CARIFORUM Painting professionals to pay for export-related services	24
Figure 12: Export services for which CARIFORUM Painting professionals would pay	25
Figure 13: Export services to be prioritised by Caribbean Export for CARIFORUM Painting professionals.....	26

LIST OF TABLES

Table 1: Related Services and Goods for Painting.....	6
Table 2: Rating of export challenges by CARIFORUM Painting professionals (no. of respondents)	18
Table 3: Rating of export financing challenges by CARIFORUM Painting professionals (no. of respondents)	21
Table A1: Breakdown of respondents in CARIFORUM Painting value chain	30
Table A2-1: List of stakeholders consulted for Painting in the EU	31
Table A3-1: List of stakeholders for Painting in the selected EU Member States	33



List of Acronyms

CARICOM	Caribbean Community – regional institution comprising 15 member states
CARIFORUM	CARICOM plus the Dominican Republic.
Caribbean Export	Caribbean Export Development Agency
CCIs	Cultural and Creative Industries
CDB	Caribbean Development Bank
EC	European Commission
EU	European Union
EU-28	European Union (including 28 Member States)
Eurostat	Statistical Office of the European Union
GDP	Gross Domestic Product
ITC	International Trade Centre (UN)
IDB	Inter-American Development Bank
LAC	Latin America and Caribbean
OECD	Organization for Economic Cooperation and Development
OECS	Organization of Eastern Caribbean States
SME	Small and medium-sized enterprise
UNCTAD	United Nations Conference on Trade and Development
UNDP	United Nations Development Programme
VC	Value Chain
VCA	Value Chain Analysis

Country Abbreviations for EU Member States selected for this project:

DK	Denmark
DE	Germany
EE	Estonia
ES	Spain
FI	Finland
FR	France
IT	Italy
NL	Netherlands
UK	United Kingdom



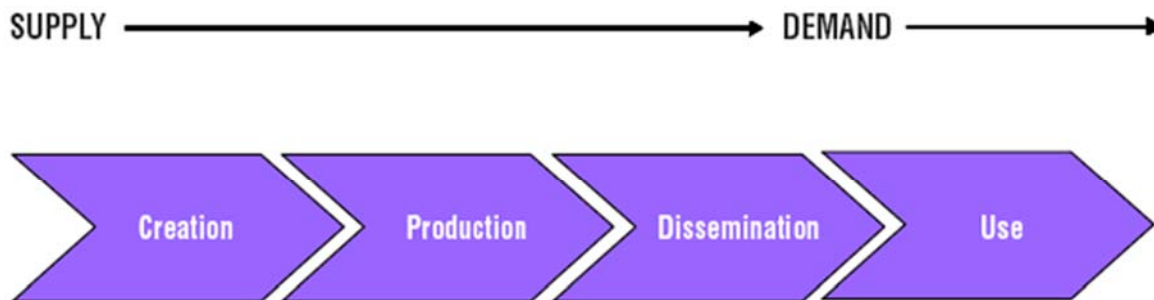
1. Introduction

1.1. Definition of Value Chains

A value chain, also referred in the framework of the Cultural & Creative Industries (CCIs) as a 'creative chain', has been described as *"a sequence of activities during which value is added to a new product or service as it makes its way from invention to final distribution"* (Botkin and Matthews 1992, p. 26).

The **creative chain** consists of an initial creative idea, which is usually combined with other inputs to produce a culture good or service, through a series of interlinked stages between their production and use. A culture product must be created, produced, possibly manufactured or reproduced, and then distributed before it reaches, or is used by, a consumer. This chain of activity includes a number of distinct steps, usually occurring in business establishments.¹ The basic steps of the creative chain are shown in the figure below.

Figure 1: Basic Creative Chain



In this basic chain, “creation” incorporates “concept” & “design”, while “dissemination” includes marketing, sales, distribution and the other value-added activities that occur prior to use/consumption. Accordingly, the chains will differ according to the good or service, the targeted markets and other factors. However, in order to collect harmonised and, when possible, comparable data, we are going to use a simple value chain as a framework of analysis (linear value chain). Nevertheless, we consider the local ecosystem as a key factor influencing CCIs’ supply chain and their performance. The value chain’s analysis will therefore include the analysis of the policy environment, measures and key actors enabling the sector’s development and growth.

In elaborating on these chains, special emphasis will be placed on determining the existence of and/or practical scope for integration of complementary inputs at any point along the chain, from differing CARIFORUM member states up to and including the final stage of the chain.

¹ Canadian Framework for Cultural Statistics (2011).



On this basis, this report considers the value chains using a two-fold approach: analysis of the **supply (CARIFORUM) side**, and analysis of the **demand (EU) side**.

With regards to possible business cooperation opportunities in the target EU markets, attention has been given, where possible, to the following *inter alia*: EU distributor or agent (including marketing and promotional activities); joint-ventures and e-commerce platforms - both Business-to-Consumer (B2C) and Business-to-Business (B2B).

1.2. Sectoral Scope: CARIFORUM Painting - Services and Goods

For this consultancy, 6 CIs were selected for study of their value chains reflecting both goods and services: **Music (recorded and live), Film, Fashion, Jewellery, Painting, and Arts & Craft.**

To determine the goods and services that fall within these sub sectors, the team utilised a combination of the definitions used for the CCIs in UNCTAD Creative Economy Report 2010, the UNESCO Framework for Cultural Statistics (FCS) as well as the KEA report of 2006 on the Economy of Culture.

Table 1: Related Services and Goods for Painting

Related Services	Related Goods (physical and intangible ²)
Conventions and events Promoting services Temporary exhibitions Trade fairs/Art Market On-line sales services Museums	Paintings (including digital formats)

² Definition derived from http://en.wikipedia.org/wiki/Intangible_good (accessed on 16.11.14).



1.3. Geographical Scope: CARIFORUM and European Union

The geographical scope of the project includes all 16 CARIFORUM countries: Antigua and Barbuda, The Bahamas, Barbados, Belize, Dominica, Dominican Republic, Haiti, Grenada, Guyana, Jamaica, Montserrat, St. Lucia, St. Kitts and Nevis, St. Vincent and the Grenadines, Suriname, and Trinidad and Tobago.

On the EU side, the Consultancy considers selected markets of the European Union to explore trade opportunities: Denmark, Estonia, Finland, France, Germany, the Netherlands, Spain, Sweden and the United Kingdom (9 Member States).

1.4. Methodology

The methodology employed in this Consultancy combined desk research, face-to-face interaction, online surveys as well as virtual communication in order to achieve the expected results.

This multifaceted approach is summarised below:

- Overview of CCIs locally and examination of export opportunities along the value chain:
 - o Desk research to collect preliminary data (quantitative and qualitative) on the export value chains of the selected sub sectors of the CCIs in Caribbean countries, and to gather information on target markets for exports (EU countries).
 - o Meetings with stakeholders, where necessary to supplement the desk research.
- Comprehensive mapping of the value chains for the CCIs in selected EU Member States, and identification of opportunities for CARIFORUM CCIs – using a combination of an online survey, desk research and fieldwork.
 - o Online questionnaire (survey) was designed in SurveyMonkey for use across the Caribbean by the core team and Local Exports in consultations with creative practitioners.
 - o Fieldwork at local level was conducted by the network of Local Experts, under the guidance of VPAJ, each with responsibility for collecting data, assessing the specific situation, engaging with potential stakeholders, and recording their views. This equivalent work in the EU member states was conducted by KEA.
- **Road map** for enhancing the competitiveness of CCIs in entering the value chain which considers export growth potential and existing bottlenecks, with accompanying **strategy and action plan** to address the constraints faced by CARIFORUM CCIs practitioners in their exports. Wherever possible, this references international best practices, and puts forward recommendations for CARIFORUM CCIs, including niche markets, important festivals/trade fairs, key actors for partnerships at international level as well as cooperation arrangements for mutual benefit (e.g. joint ventures, visibility in partners' markets, twinning and exchange programmes etc.). As relevant,



the strategy also provides recommendations on potential clustering opportunities in CARIFORUM countries to e.g. develop joint marketing strategies, lower export costs, and improve the visibility of their products and services in priority markets.

- Through industry validation of this Final VCA Report, the team will make the necessary adjustments to correct for errors or oversights, and to reflect critical additional input.

Survey respondents

The following discussion is based on the results collected through this survey exercise for the 33 professionals who specified 'Painting' as their *main* industry. They are based in 15 of the 16 CARIFORUM countries.

Only in some instances is the full survey dataset discussed: 410 creative professionals involved in the 7 CCI/sub-sectors, based in 15 CARIFORUM countries (as of 31st May 2015).

Methodological limitations

The most significant methodological limitation has been the varying – and at times, small – numbers of creative professionals who participated in the survey. The resultant sample size at times limited the authors' abilities to reach conclusions for some of the survey questions. The authors therefore hereby acknowledge that this report does not present a *definitive* characterisation of the CARIFORUM CIs, but rather provides a foundation upon which to build.

Reports

An **industry-specific Value Chain Analysis (VCA) Report** like this one has been drawn up for each of the six CIs under review - namely **Music (recorded and live), Film, Fashion, Jewellery, Painting, and Arts & Craft**. The results from each are aggregated into an overarching report, entitled "Development of a Regional Export Strategy for the Creative Industries Services: **Value Chain Analyses Final Report**". Whilst the latter includes some industry specificity, it is recommended that the relevant industry-specific VCA Reports are read in conjunction with the Final Report.

2. Mapping the Value Chains for CARIFORUM CCIs

As mentioned, this report considers the value chains for the selected CIs using a two-fold approach: analysis of the **supply (CARIFORUM) side**, and analysis of the **demand (EU) side**.

The value chains developed are based on the schematology of Film by Aarhus, Alexandra Institute and High Tech Accelerator Innovation Centre (2011). The industry-specific value chain for Painting is discussed in Section 3.2.2, and presented in Figure 2 with the survey respondents mapped to each activity. The actual number of respondent involved in each type of activity is given in the table in Annex 1.



3. Market Opportunities for CARIFORUM's Painting (Visual Arts Sector)

3.1. Trends in the EU for Painting

Paintings are part of the visual arts sector in Europe. Specific data on paintings is scarce, but figures are available on certain parts of the value chain such as arts sales in galleries and auction houses. In 2011 Europe was responsible for 34% of the global art market with estimated sales of €15.6 billion by art dealers and auctions.³ This market is dominated by the United Kingdom, France and Germany.

Museums only cover a relative small part of the turnover for visual arts (6.1%) according to the EY study. Seven of the ten world's most visited museums are based in Europe (Louvre, British Museum, Tate Modern, National Gallery, Vatican Museums, Centre Pompidou and Musée d'Orsay). Museums are also experimenting new technologies to make the collections accessible to visitors as well as to enhance their experience when visiting the museums. Due to the growth of wealthy buyers from the emerging economies, in particular China, the art market has moved from the US and Europe to Asia. The globalization of the art market has concentrated the sales of art in fewer places and the hands of a number of top art trade fairs/shows such as Art Basel, which has events in Basel, Miami and Hong Kong. This is to the disadvantage of smaller trade fairs in Europe.

3.2. Trends in CARIFORUM for Painting

3.2.1 Overview of CARIFORUM Painting Industry

"With the exception of Haiti (and to a much less prominent degree, the Dominican Republic) the region's visual arts arguably have little extra-regional identity outside of diaspora communities. In the case of this industry, practicing artists suggest that, given their influence, a regional effort be made to attract interest from prominent curators attached to leading EU galleries and auction houses. Similarly, a regional push to attract art critics attached to targeted journals/magazines in the EU to see the works of CARIFORUM's leading painters should be put into effect with a commitment to engage in the process over the medium- to long-term. To a much greater extent than now obtains, CARIFORUM painters as well as galleries should be encouraged to use the digital platforms that now exist, to publicize their work to EU art-lovers. In the same vein, the staging of national and regional biennales and similar showcases may assist in presenting a broader picture of the creative scope of painters from the region."

Sources: <http://www.galleryofwestindianart.com/aboutthegallery.html>;
<http://www.encyclopediapr.org/ing/article.cfm?ref=11092606&page=3>

³ Source: "Creating growth, Measuring cultural and creative markets in the EU" (EY Report, 2014)

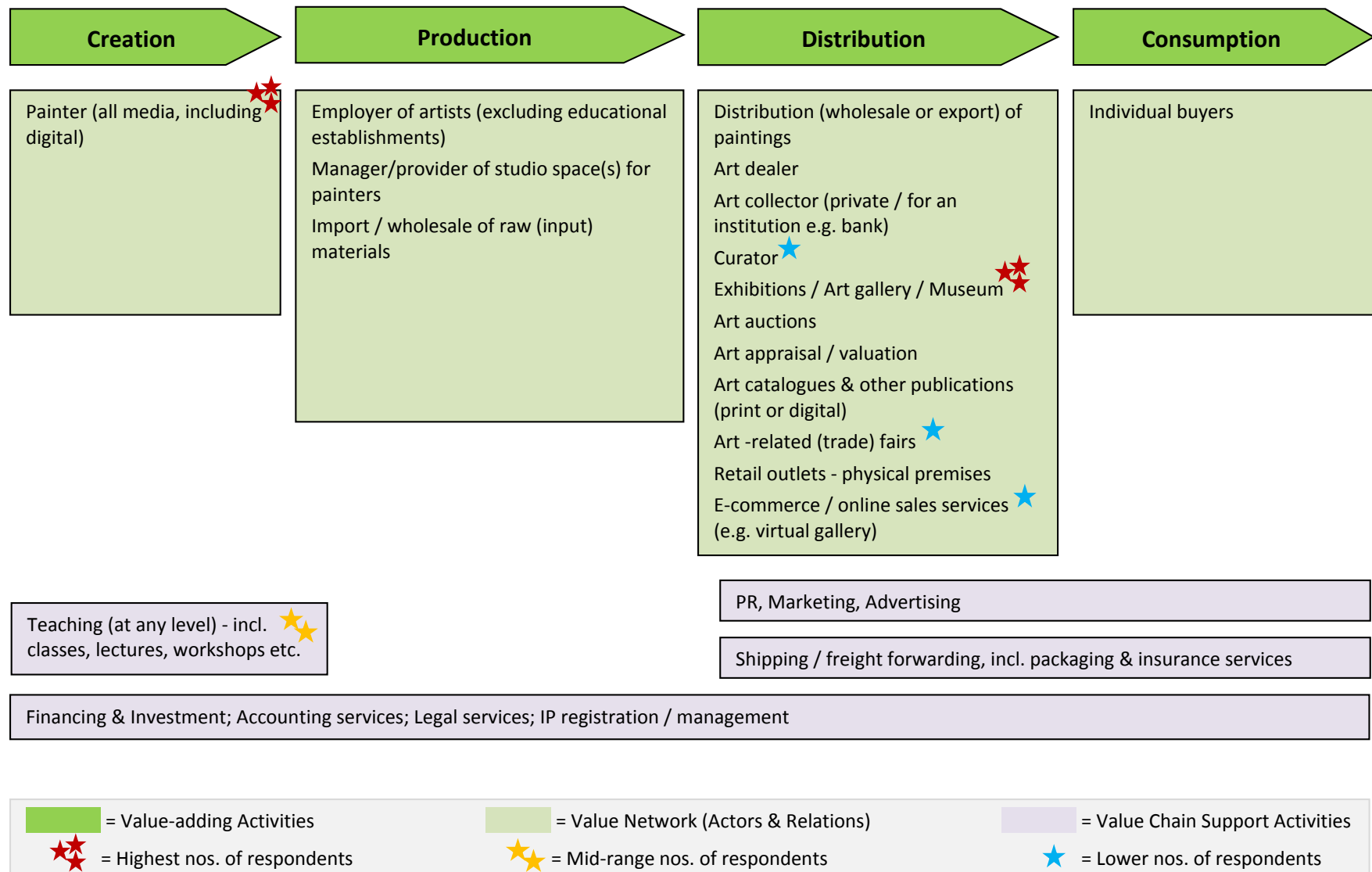


3.2.2 Characteristics of CARIFORUM Painting professionals

- Of the 33 Painting respondents, most are involved in the “creation” stage as well as in ‘Exhibitions / Art gallery / Museum’ (“distribution” stage). Many are also involved in Teaching. Their distribution along the CARIFORUM Painting value chain is illustrated in Figure 2; and the actual number involved in each type of activity is given in the table in Annex 1.
- Several Painting professionals also work in the other CCI under review – most notably ‘Arts & Craft’ (in “creation” stage and Teaching) as well as ‘Jewellery’ (in “creation” stage).
- Almost 85% of respondents fully own their business; and almost 70% have their business registered under their country’s national law.
- 67% of respondents work in their business full-time; the rest (33%) work part-time.
- 33% have full-time (FT) employees, of whom the majority had 1-4 FT employees (almost 90%) followed by 5-9 FT employees (11%). By contrast, 46% had part-time (PT) employees; and of these, > 80% had 1-4 PT employees, and 17% had 10-15 PT employees.
- > 65% of respondents provide both Painting-related services and goods (whether physical or ‘intangible’ (virtual, digital); 31% provide only goods; and 3% only service(s).



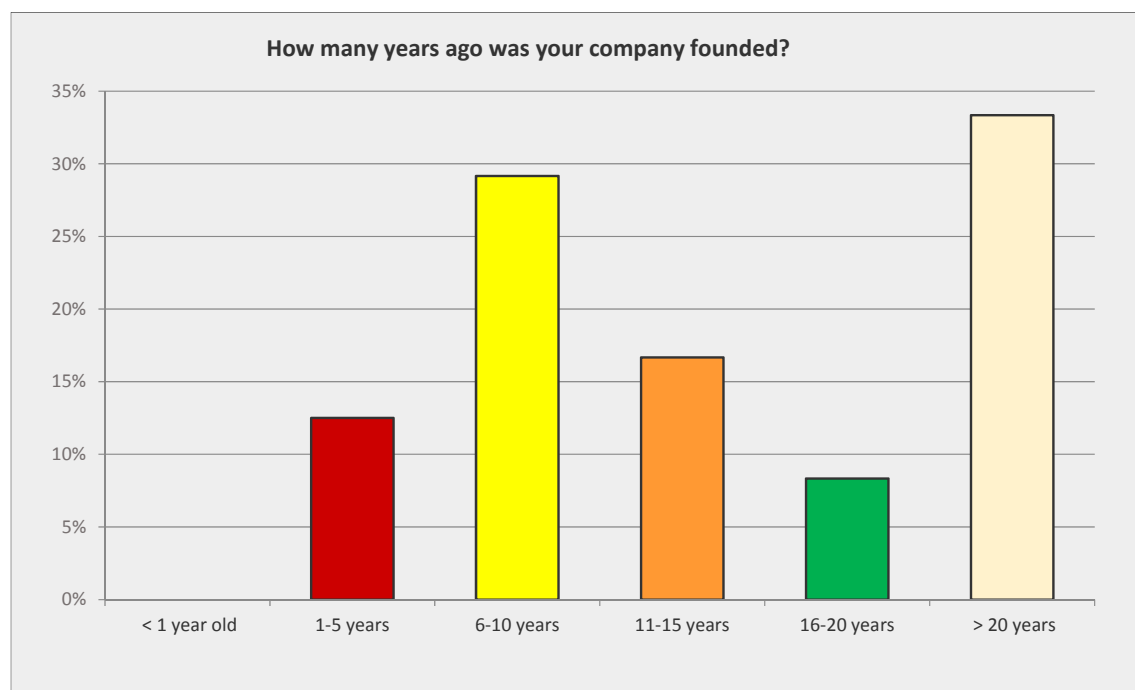
Figure 2: Mapping of respondents along Value Chain for CARIFORUM Painting





- There is considerable variation in the longevity of respondents' businesses, from < 1 year to 55 years. Unlike the other CIs under review, the majority fall within the > 20 years range. This is followed by the 6-10 year range.

Figure 3: Company age range for CARIFORUM Painting respondents



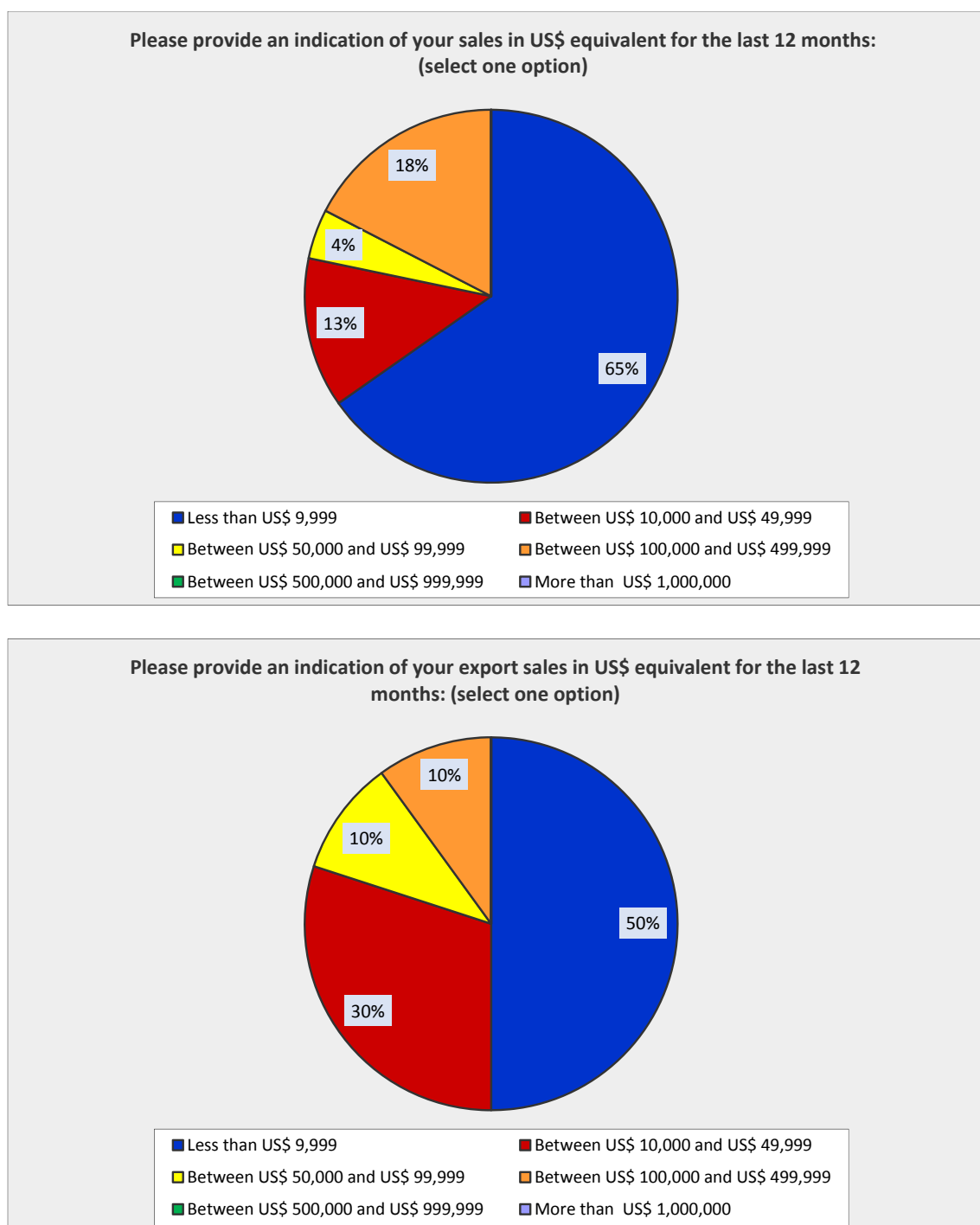
- In terms of their last 12 months, 65% of Painting respondents recorded sales of < US\$ 9,999; 13% of US\$ 10,000 - US\$ 49,999; 4% of US\$ 50,000 - US\$ 99,999; and 18% of US\$ 100,000 and US\$ 499,999. This is illustrated in Figure 4, along with the export sales of Painting.

3.2.3 Current export activities of CARIFORUM Painting professionals

- Considering their *exports* for the last 12 months, 50% of respondents indicated sales of < US\$ 9,999; 30% of US\$ 10,000 - US\$ 49,999; 10% of US\$ 50,000 - US\$ 99,999; and 10% of US\$ 100,000 and US\$ 499,999. As such, it can be seen that exports already constitute a significant component of sales for the Painting professionals who responded to this survey exercise.



Figure 4: Comparison of total and export sales for CARIFORUM Painting respondents



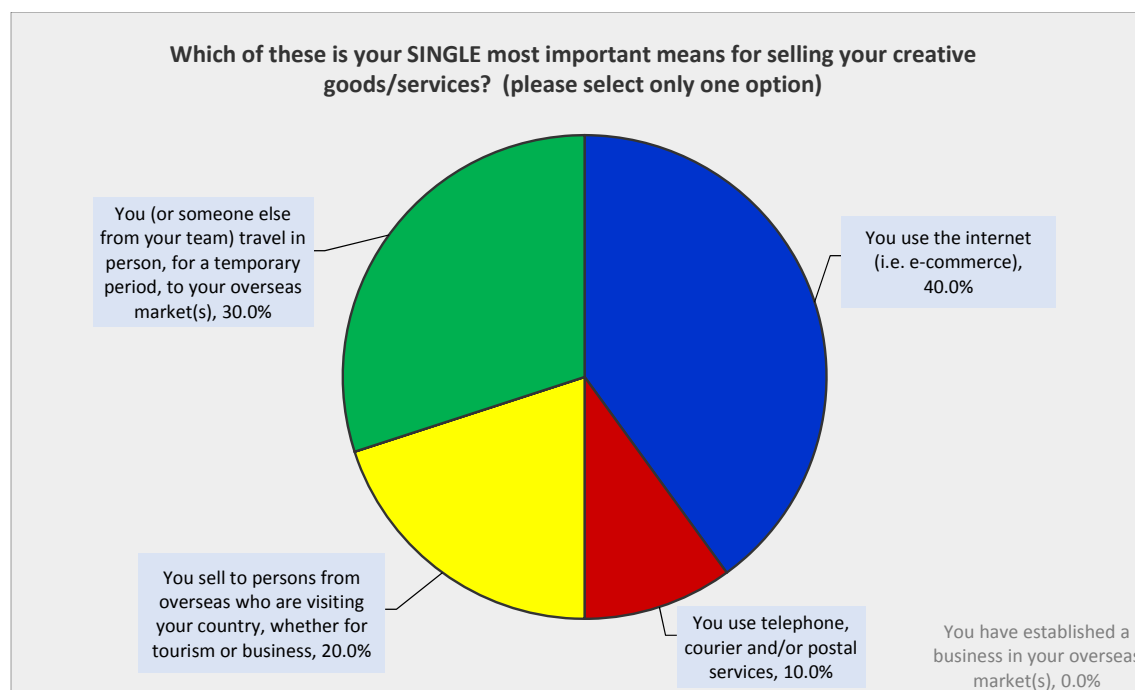
- Almost 70% do not have an Export Strategy for their business, the other 30% do.
- Nearly 45% of respondents are currently exporting; and they use four of the five export modalities to deliver/sell their creative goods/services, promote and otherwise transact business. None of the respondents selected 'You have established a business in your overseas market(s)'.

The following Figure 5 indicates the relative importance of the four export modes used



by CARIFORUM's Painting professionals to sell their goods/services.

Figure 5: Most important export modes for CARIFORUM Painting professionals

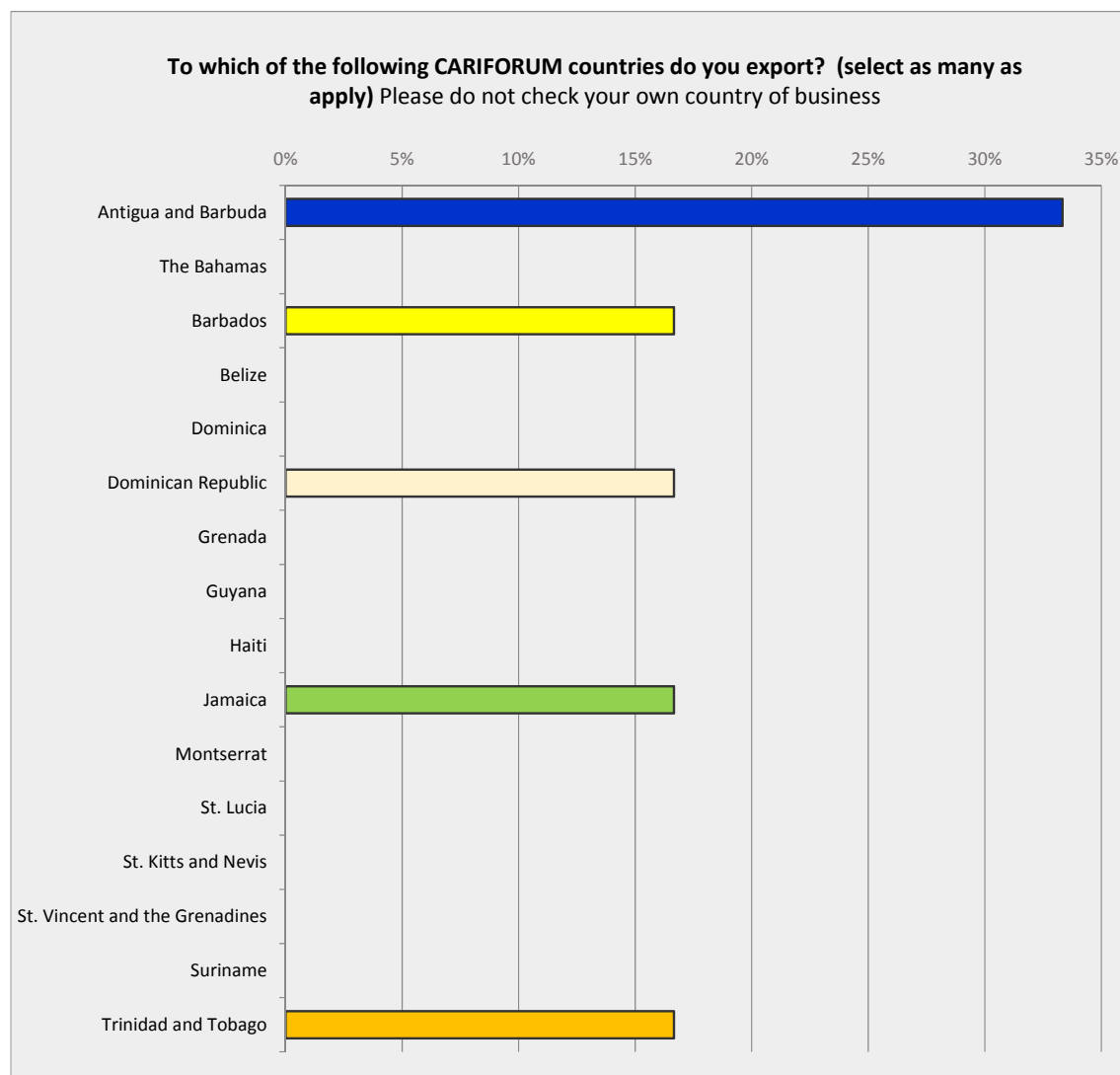


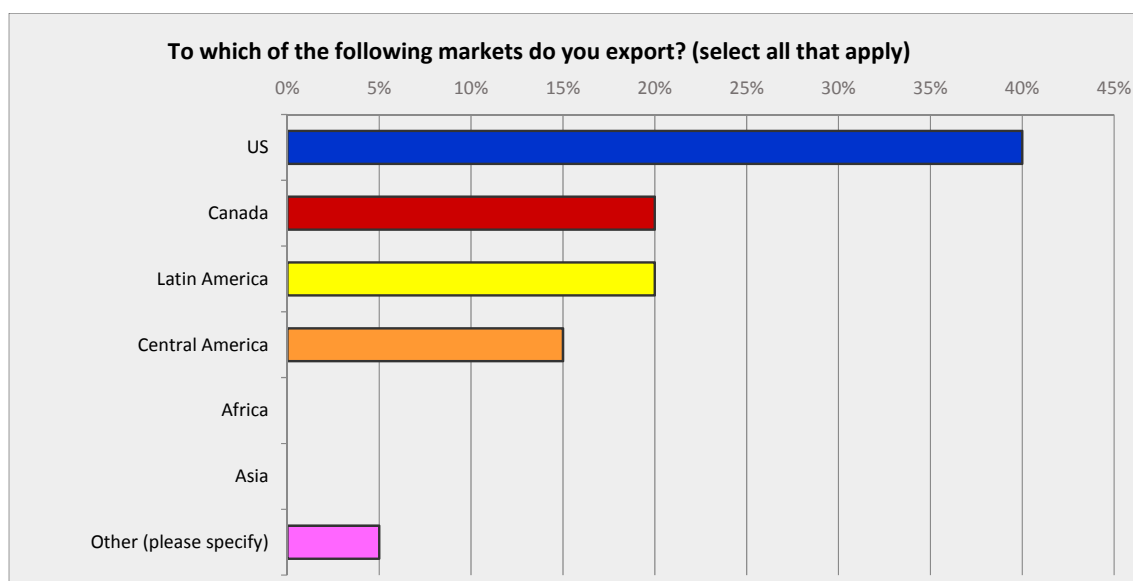
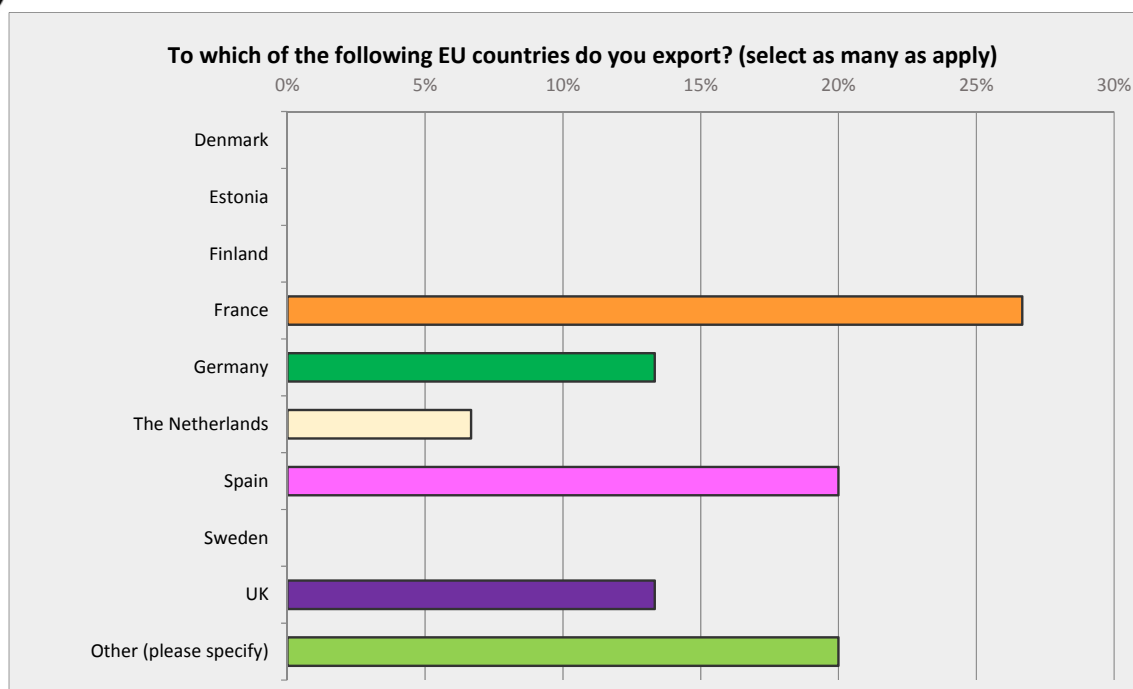
- Specific to their e-commerce activities, respondents listed the following as online platforms/services they employ:
 - o Email, websites (to show gallery's available collection to potential clients)
 - o Social media: overall, there is widespread use - in particular, Facebook (75% of respondents). Also used, to a lesser extent, are Twitter and LinkedIn (10-15%).
 - o Online stores, platforms and services - <http://www.artnet.com>
- For those who export: (*countries listed in decreasing order of popularity*)
 - o 30% do so to another country in CARIFORUM; with Antigua & Barbuda being the most popular. There are also some exports to a number of other countries in the region.
 - o 60% export to a country in the EU, with France and Spain being the most popular markets, followed by Germany and the UK.
 - o 90% export elsewhere in the world, with the US being the most popular. This is followed by Canada and Latin America, and then countries in Central America.

The popularity of the individual countries for export is given in the bar charts in Figure 6. The % is the number of respondents exporting to the country as a proportion of the total number exporting to that region. As some of the absolute values are small, only the relative ranking of countries is discussed above.



Figure 6: Prevalence of exports to CARIFORUM, EU and other markets by CARIFORUM Painting professionals





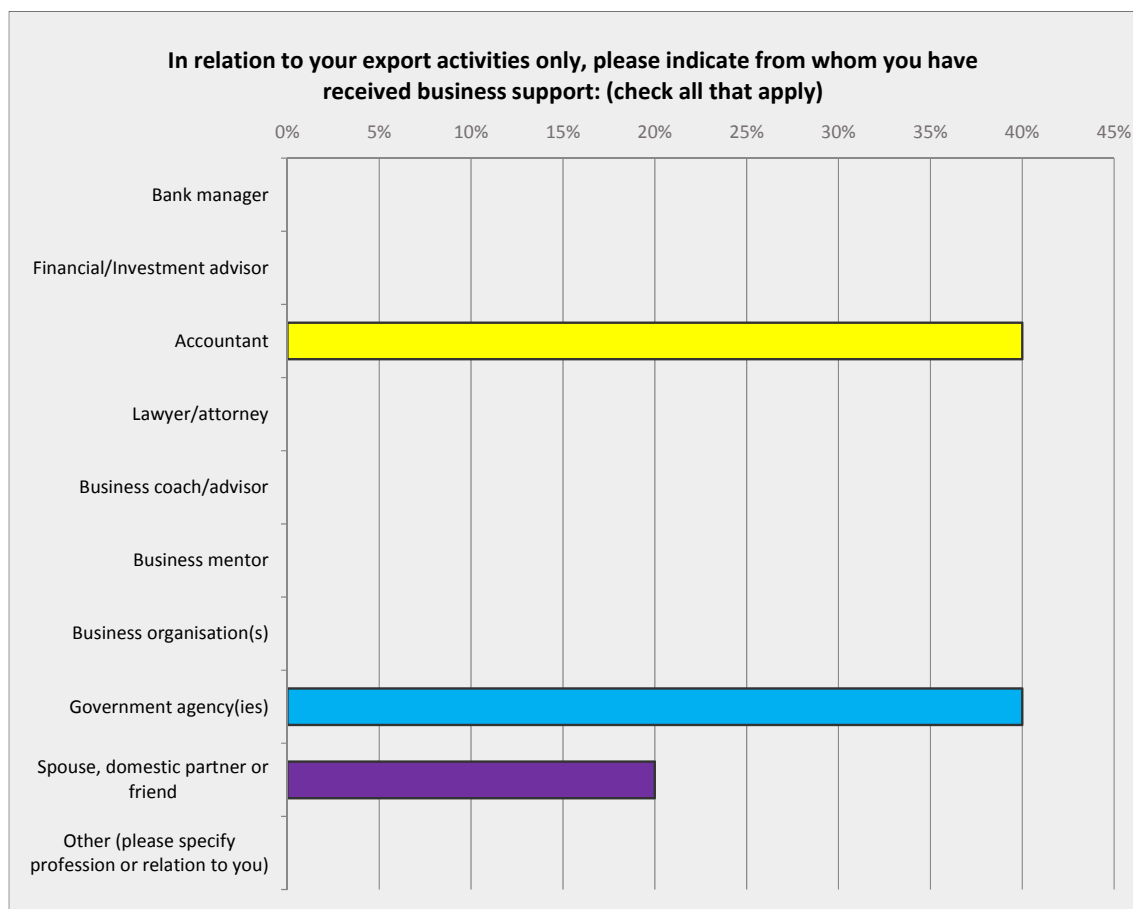
- Of the 55% respondents who are not currently exporting, the majority have never tried (> 75%); and the remainder (25%) has 'tried without much (any) success'.
- Of note, nearly 85% of respondents who are not currently exporting would be interested in starting (or resuming) their exports. 8% stated that they are not interested; the rest (8%) are not yet interested.



3.2.4 Export support framework for CARIFORUM Painting professionals

- >90% of respondents noted that they do not receive business support from anyone specific for their export efforts. For those who have, support has come predominantly from an accountant or government agencies followed by spouse/domestic partner or friend. This is indicated in Figure 7.

Figure 7: Sources of support used by CARIFORUM Painting professionals for their export activities



- Just over 20% of CARIFORUM Painting respondents belong to a business organisation, whether local/national, regional or international. For most, this is an 'industry-specific association, network, alliance, or group'. No details were provided by respondents on how this membership has boosted their export efforts.



4. Bottlenecks along the Paintings (Visual Arts) Value Chain

Due to the small size of the domestic markets in nearly all CARIFORUM countries as well as the persistent decrease in local demand, there is need for considerable expansion of foreign markets. Whilst there is scope for the increase of creative exports to the EU, numerous challenges are noted.

4.1. Export challenges facing CARIFORUM Painting professionals

- Just over 30% of respondents have experienced challenge(s) to their creative exports, to greater or lesser extent. As indicated in the table below, there are various challenges considered equally severe. [The small sample size is acknowledged]

Table 2: Rating of export challenges by CARIFORUM Painting professionals (no. of respondents)

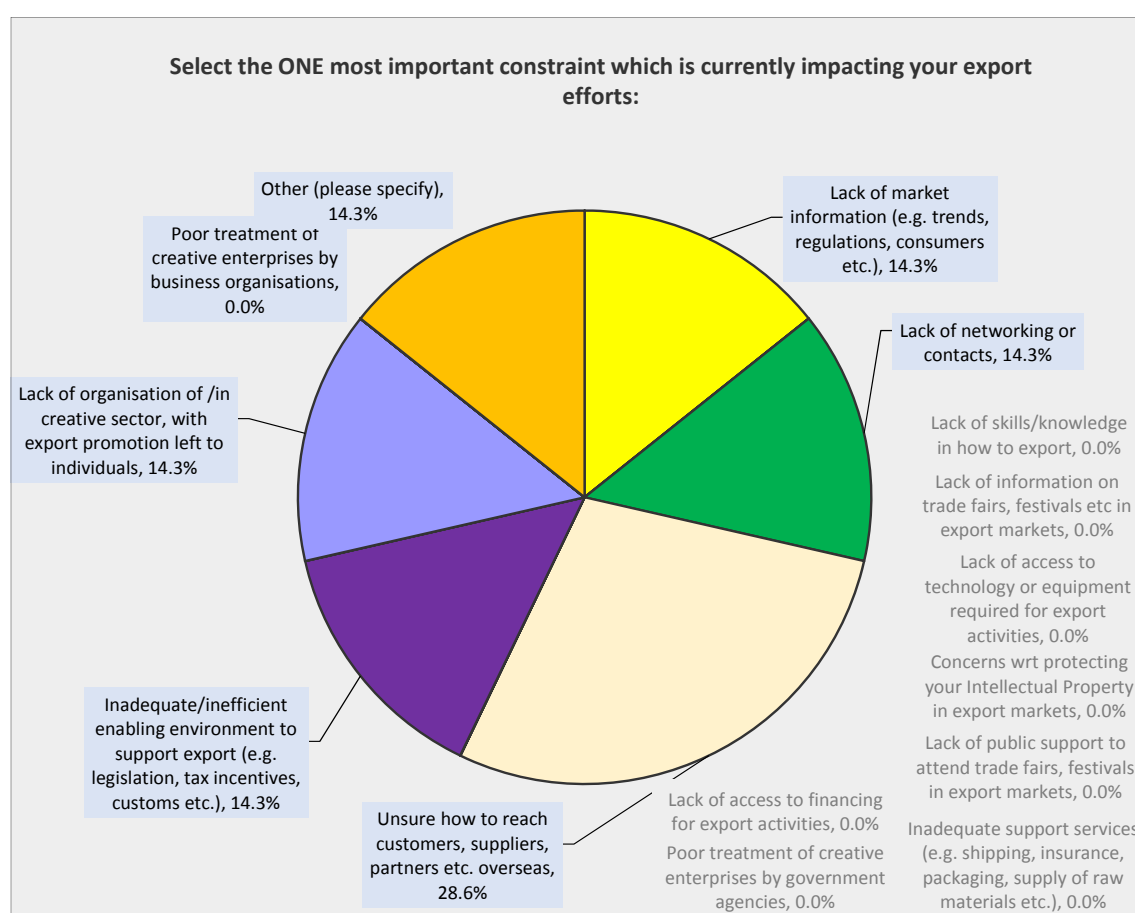
From your own experiences, how would you rate the following challenges to your export efforts?					
Answer Options	Not very important	Quite important	Very important	N/A	Rating Average
Lack of skills/knowledge in how to export	1	1	4	1	2.50
Lack of access to technology or equipment required for export activities	1	1	3	2	2.40
Lack of market information (e.g. trends, regulations, consumers etc.)	1	1	4	1	2.50
Lack of information on trade fairs, festivals etc in export markets	1	2	3	1	2.33
Lack of networking or contacts	2	1	3	1	2.17
Unsure how to reach customers, suppliers, partners etc. overseas	1	2	3	1	2.33
Concerns wrt protecting your Intellectual Property in export markets	3	1	2	1	1.83
Lack of public support to attend trade fairs, festivals in export markets	1	1	4	1	2.50
Inadequate/inefficient enabling environment to support export (e.g. legislation, tax incentives, customs etc.)	1	2	3	1	2.33
Inadequate support services (e.g. shipping, insurance, packaging, supply of raw materials etc.)	2	2	2	1	2.00
Lack of organisation of /in creative sector, with export promotion left to individuals	0	2	4	1	2.67
Lack of access to financing for export activities	1	1	4	1	2.50
Poor treatment of creative enterprises by financial institutions	1	0	4	2	2.60



Poor treatment of creative enterprises by business organisations	1	0	4	2	2.60
Poor treatment of creative enterprises by government agencies	1	0	4	2	2.60
No. respondents = 7					

- As shown in Figure 8, the single most important export challenge facing CARIFORUM Painting professionals is 'Unsure how to reach customers, suppliers, partners etc. overseas' (selected by almost 30% of respondents). This is followed by various other challenges in equal, but lesser, measure (each by 15%).

Figure 8: Most important export challenges facing CARIFORUM Painting professionals

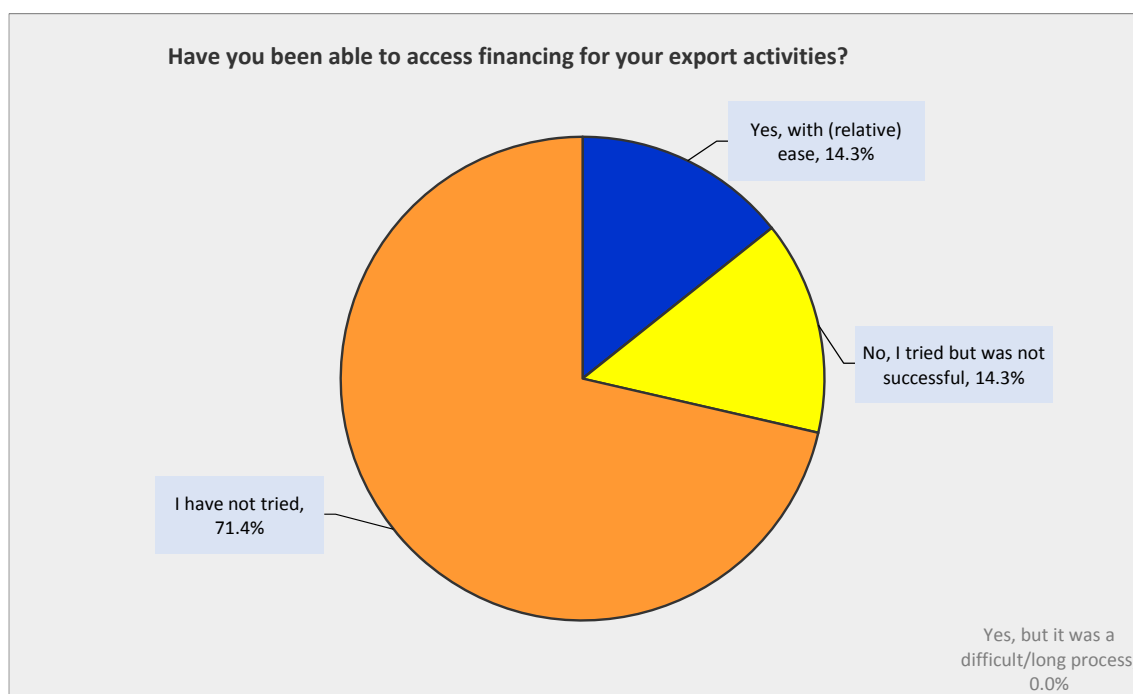


- The following were not noted by any of these Painting professionals as their *single* most important export constraint:
 - o Lack of skills/knowledge in how to export
 - o Lack of information on trade fairs, festivals etc in export markets
 - o Lack of access to technology or equipment required for export activities
 - o Concerns wrt protecting your Intellectual Property in export markets
 - o Lack of public support to attend trade fairs, festivals in export markets



- Inadequate support services (e.g. shipping, insurance, packaging, supply of raw materials etc.)
 - Lack of access to financing for export activities
 - Poor treatment of creative enterprises by government agencies
- As relates to accessing financing for export, nearly 15% of respondents have been successful, with (relative) ease as depicted in Figure 9. A further 15% tried but were not successful; and > 70% have not tried. [The small sample size is acknowledged for this question]

Figure 9: Experience of CARIFORUM Painting professionals to access export financing



- Only one respondent identified having experienced export financing challenges (and therefore, able to rank the same), as presented in Table 3 below. Further discussion is not possible given the small sample size.



Table 3: Rating of export financing challenges by CARIFORUM Painting professionals (no. of respondents)

Specific to finance for exports, how would you rate the following in terms of their importance?					
Answer Options	Not very important	Quite important	Very important	N/A	Rating Average
Lack of suitable financing options available to you	0	0	1	0	3.00
You were unable to meet the lender's security/collateral requirements	0	0	1	0	3.00
Lender was not satisfied with the state/quality of your business documentation	0	0	1	0	3.00
Lender approved a loan but the amount was too low	0	0	1	0	3.00
Lender approved a loan but the term was too short	0	0	1	0	3.00
Lender approved a loan where the conditions were otherwise unacceptable	0	0	1	0	3.00
No. respondents = 1					

- Almost 60% of respondents did not have to access to venture capital as an option to finance their business's export growth efforts; and almost 30% were unsure. [Only 1 respondent did have access to venture capital]

4.2. Challenges within EU for CARIFORUM Painting

Nothing of particular note was found for this report.



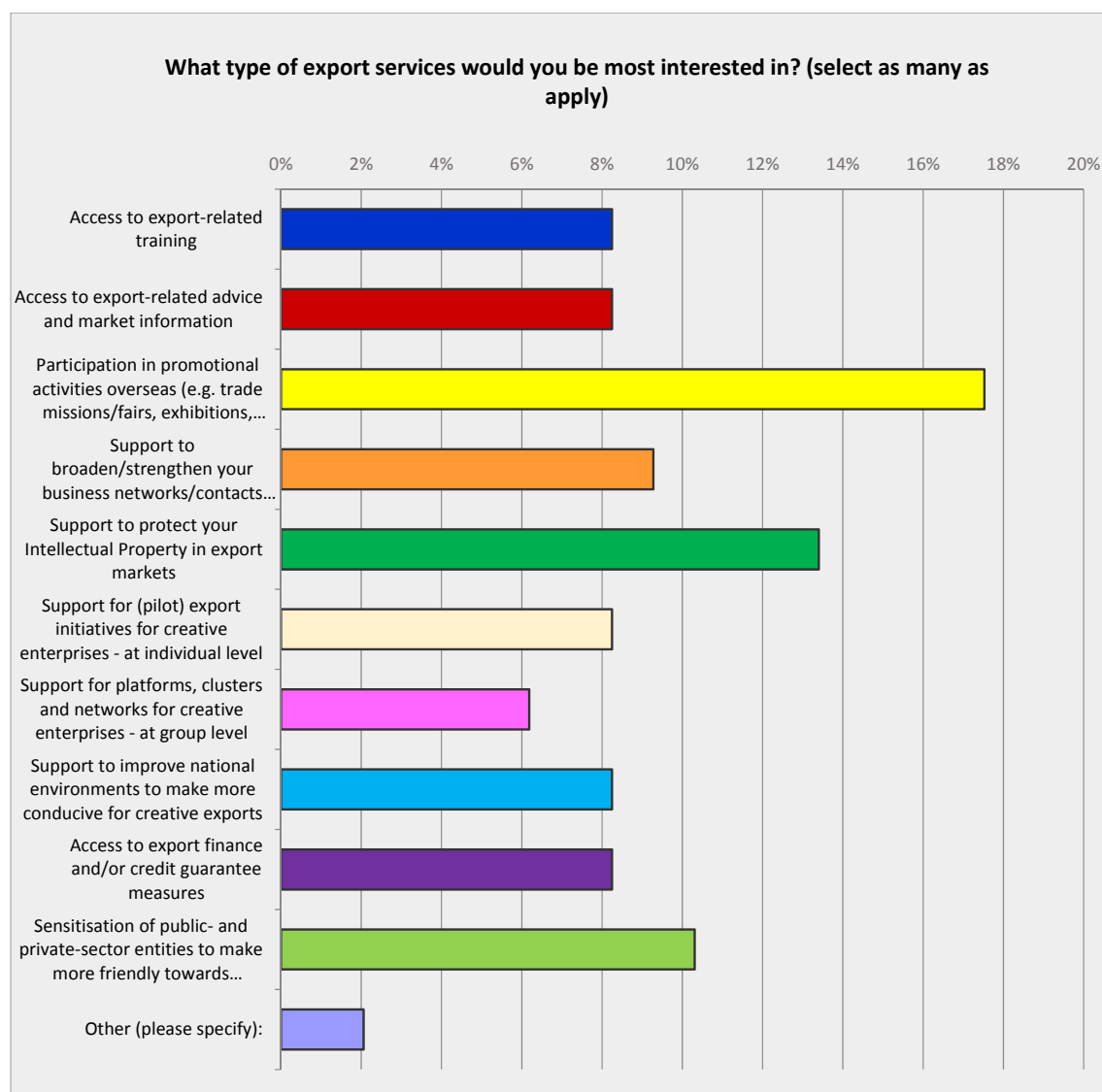
5. Recommendations to Boost Export of CARIFORUM Painting

5.1. Improving export support for CARIFORUM Painting professionals

- As previously noted, nearly 85% of respondents who are not currently exporting would be interested in starting (or resuming) their exports.
- > 90% of respondents noted their interest in accessing support services to boost their creative exports. As illustrated in Figure 10, when given a selection of possible export-related services:
 - o The most popular were: 'Participation in promotional activities overseas e.g. trade missions/fairs, exhibitions, festivals etc.' (selected by almost 20% respondents) and 'Support to protect your Intellectual Property in export markets' (13% respondents).
 - o These were followed by 'Sensitisation of public- and private-sector entities to make more friendly towards creative enterprises' and 'Support to broaden/strengthen your business networks/contacts overseas' (each selected by 9-10% of respondents).



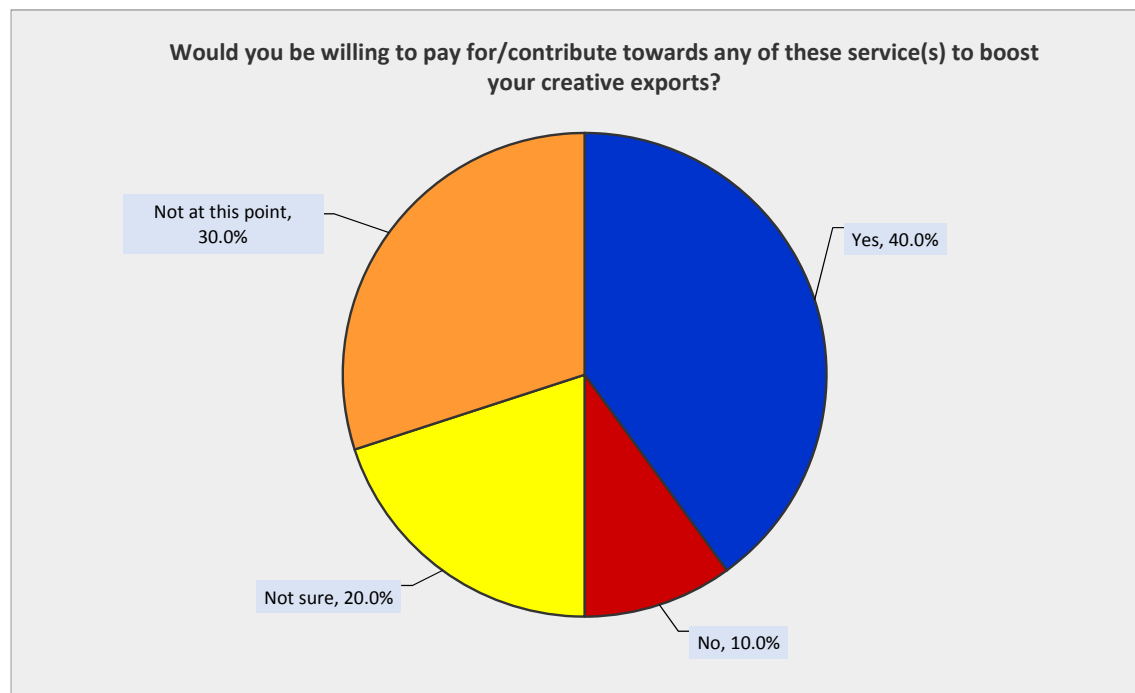
Figure 10: Prioritisation of export services by CARIFORUM Painting professionals





- As shown in the following Figure 11, 40% of Painting respondents stated that they would be willing to pay for/contribute towards such services at this point in time.

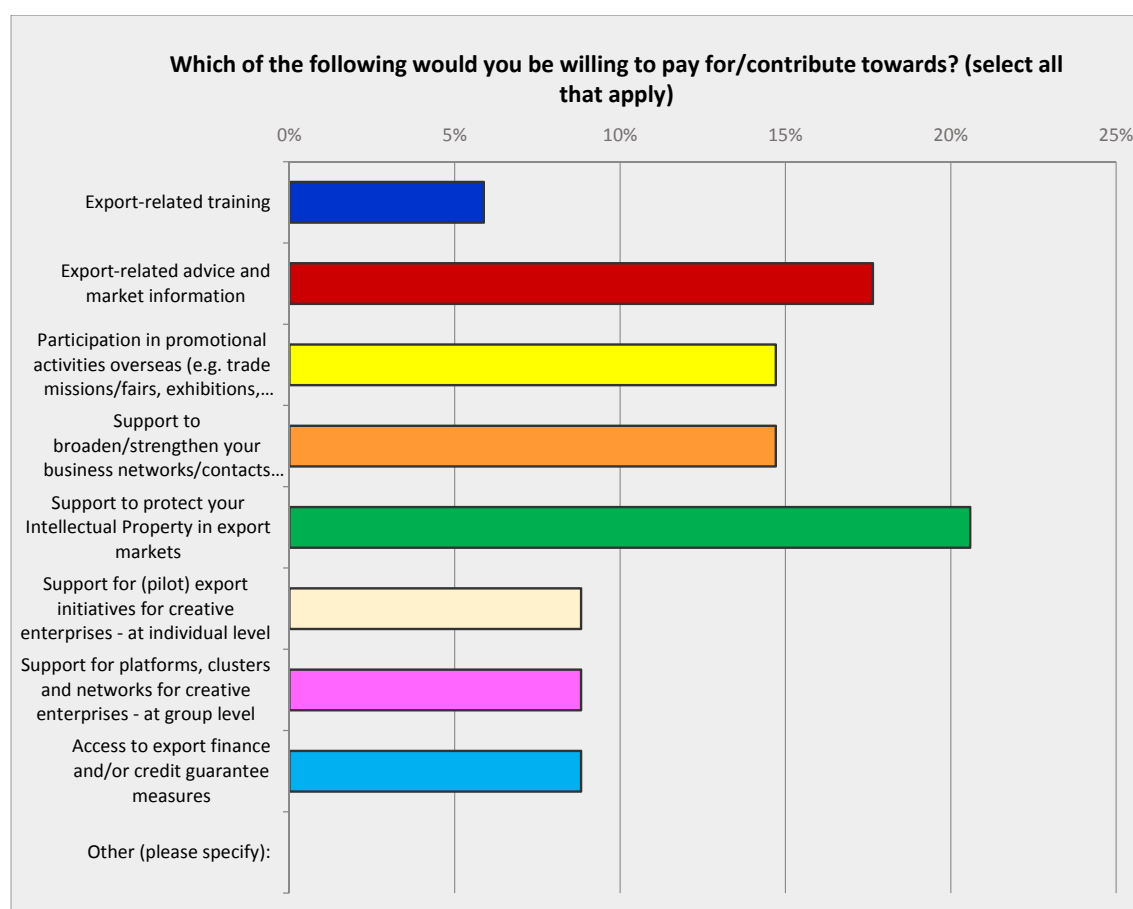
Figure 11: Willingness of CARIFORUM Painting professionals to pay for export-related services



- Of these export-related services, most of the respondents indicated that they would be willing to pay for/contribute towards 'Support to protect your Intellectual Property in export markets' (21%) and 'Export-related advice and market information' (18%). This prioritisation is indicated in Figure 12 below.



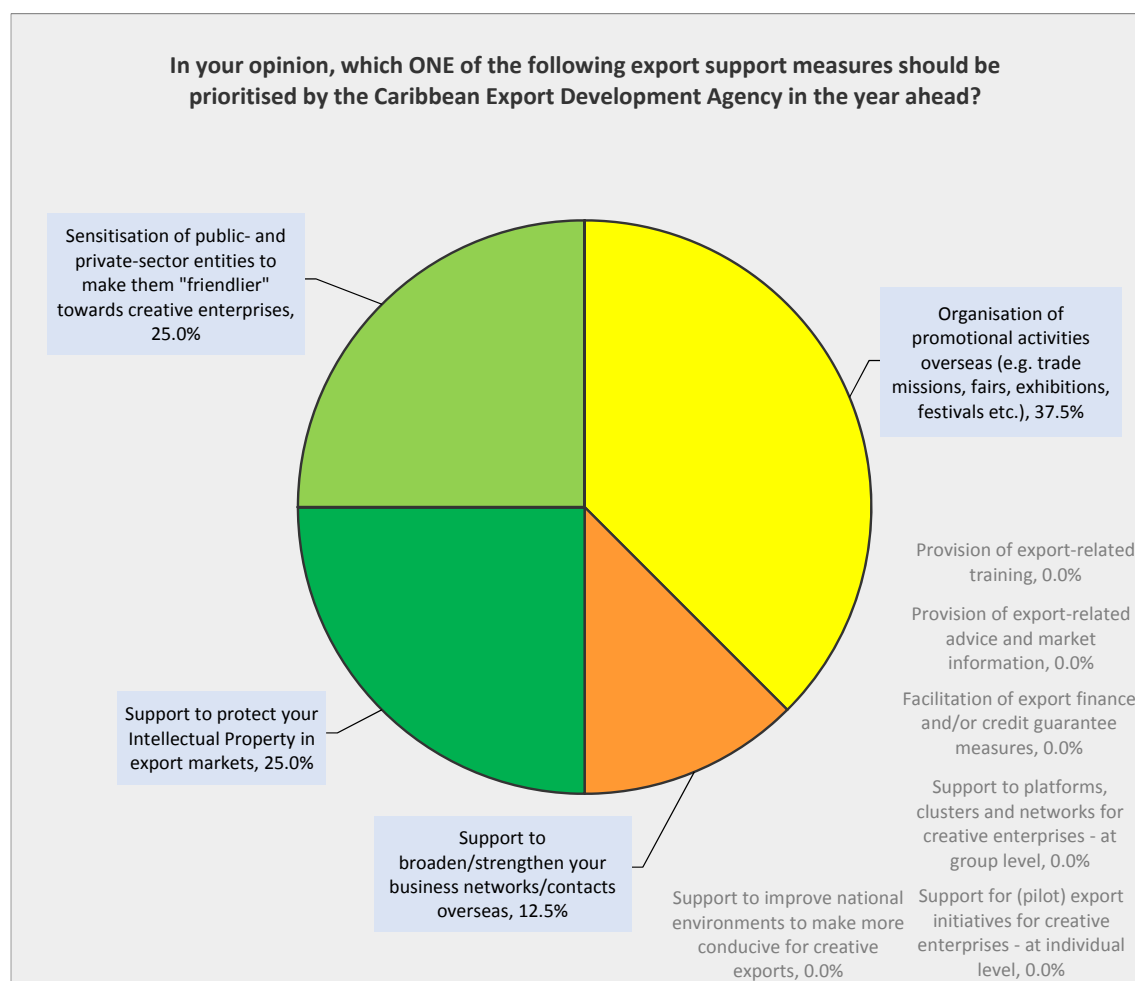
Figure 12: Export services for which CARIFORUM Painting professionals would pay



- When asked whether they reserve a budget to support their exports, > 60% responded “not yet”; and 25% responded “no”. Only one respondent indicated that s/he reserved a budget (the amount was not given).
- As illustrated in the following Figure 13, when asked which export-related service(s) should be prioritised by Caribbean Export:
 - o The most popular was ‘Organisation of promotional activities overseas (e.g. trade missions, fairs, exhibitions, festivals etc.)’ (selected by almost 40% of respondents).
 - o This was followed by: ‘Support to protect your Intellectual Property in export markets’ and ‘Sensitisation of public- and private-sector entities to make them “friendlier” towards creative enterprises’ (each selected by 25% of respondents).



Figure 13: Export services to be prioritised by Caribbean Export for CARIFORUM Painting professionals



- The following services were not noted by any of these Painting professionals as priorities for Caribbean Export:
 - Provision of export-related training
 - Provision of export-related advice and market information
 - Facilitation of export finance and/or credit guarantee measures
 - Support to platforms, clusters and networks for creative enterprises – at group level
 - Support for (pilot) export initiatives for creative enterprises – at individual level
 - Support to improve national environments to make more conducive for creative exports.



5.2. Good practice in the EU Member States for Painting

Nothing of particular note was found for this report.

5.3. Scope for business cooperation between the EU and CARIFORUM for Painting

Nothing of particular note was found for this report.

5.4. Image and Reputation of CARIFORUM CCI's

The paintings (visual arts sector) should be part of an overall strategy to improve the image and branding of the cultural and creative industries in the Caribbean region. This strategy should include specific measures and pilot projects for the visual arts sector.

To increase the visibility of the Caribbean artists and reach out to international customers we recommend that at a first stage a closer look is taken at the funding programmes for artists in the EU. There are some interesting programmes of public bodies and foundations in Finland, France, Germany, Italy, the Netherlands and Spain that could provide some funding and grants to Caribbean artists, curators and researchers to travel to Europe. For example: mobility programmes, artists in residencies, restorations of visual art works, research etc.

In addition to funds for Caribbean artists some of programmes also give grants to European artists to travel abroad. This is another option to attract foreign artists to the Caribbean countries and initiate international exchanges and cooperation between Caribbean and European artists.

In Annex 3 a list of public and private programmes has been listed. To support the Caribbean artists and curators in developing their art and business the Caribbean Export Development Agency should focus on a number of these programmes and contact the organisers to discuss how potential cooperation. It is recommended that proactive steps be taken to reach out to these funding entities, as the Caribbean countries are often not a priority world region for them.

5.5. Structural relations and networks

The cultural and creative industries are developing themselves globally through structural relations and sustainable networks. This is also the case for the painting (visual arts sector). Currently the Caribbean visual arts sector is not well represented in international networks.



5.6. Expand commercial activities

For artists to develop and exploit commercial export opportunities in international markets support and grants should be given to participate in trade fairs and festivals. The assistance should be market-led and responsive to allow artists and companies to take advantage of opportunities as they arise. Grants to cover travel and accommodation expenses should be subject to the approval of a business case. See Tables 3 & A3-1 for an indicative listing.

At a later stage it could be useful to carry out a feasibility study to identify the art trade fairs in the EU with which a twinning trade fair could be set up in the Caribbean region.



Annexes



Annex 1: Details of Survey Respondents – Painting

Table A1: Breakdown of respondents in CARIFORUM Painting value chain

If in 'Painting', please identify what area(s) you work in: (select as many as apply)		
Answer Options	Response Percent	Response Count
Painter (all media, including digital)	73.3%	22
Employer of artists (excluding educational establishments)	10.0%	3
Manager/provider of studio space(s) for painters	6.7%	2
Import / wholesale of raw (input) materials	6.7%	2
Distribution (wholesale or export) of paintings	10.0%	3
Art dealer	16.7%	5
Art collector (private / for an institution e.g. bank)	13.3%	4
Curator	33.3%	10
Exhibitions / Art gallery / Museum	70.0%	21
Art auctions	10.0%	3
Art appraisal / valuation	13.3%	4
Art catalogues & other publications (print or digital)	20.0%	6
Art -related (trade) fairs	30.0%	9
Retail outlets - physical premises	13.3%	4
E-commerce / online sales services (e.g. virtual gallery)	26.7%	8
PR, Marketing, Advertising	10.0%	3
Financing & Investment	0.0%	0
IP registration / management	0.0%	0
Other services e.g. Legal, Accounting	0.0%	0
Shipping / freight forwarding, incl. packaging & insurance services	6.7%	2
Teaching (at any level) - incl. classes, lectures, workshops etc.	50.0%	15
Other (please specify)	10.0%	3
answered question		30



Annex 2: List of Stakeholders Consulted for Paintings and Visual Arts in EU Member States

Table A2-1: List of stakeholders consulted for Painting in the EU

Companies / Trade Associations	Activity(ies) of VCA	Country
Federation of European Art Gallery Associations (F.E.A.G.A.)	Advocacy, Promotion, Networking	EU
Christie's	Distribution, Consumption, Events	United Kingdom
Sotheby's	Distribution, Consumption	United Kingdom
Van Ham (D) – fine arts auction	Distribution, Consumption, Events	Germany
La Biennale di Venezia	Distribution, Exhibition, Networking	Italy
Foire Internationale d'Art Contemporain – FIAC	Distribution, Exhibition, Promotion, Consumption	France
Frieze London	Distribution, Exhibition, Promotion, Consumption	United Kingdom
Salmela Art Centre	Distribution, Exhibition, Promotion, Consumption	Finland
Art Paris Art Fair	Distribution, Exhibition, Promotion, Consumption	France
Danish Agency for Culture	Promotion	Denmark
Ammann Gallery	Distribution, Exhibition, Consumption	Germany
Chahan Gallery	Distribution, Exhibition, Consumption	France
Ifema Feria de Madrid	Distribution, Exhibition, Consumption	Spain



Annex 3: Key EU Stakeholders for CARIFORUM's Painting Industry

To identify the market opportunities for the CARIFORUM CCIs in the EU, a list of the key stakeholders were selected on the basis of the following three criteria:

- **International:** they must have an evident interest in developing relationships with the CARIFORUM region or with experience with international markets.
- **Geographical:** they can be either European or national organisations with a clear international profile.
- **Practical:** they must have a practical approach to international cooperation, and be willing to organise and take part in practical initiatives such as events, seminars, training, B2B development activities, etc.

The stakeholders were grouped per CCI sub-sector and EU Member State in the following six categories:

- **Main European trade bodies:** Trade bodies are the main stakeholders responsible for increasing business opportunities of European companies and improving their visibility at international level. This section includes European trade bodies and the main national trade bodies active at European/international level.
- **Europe-wide rights management associations:** Europe is the world region where the practice of collective rights management is most established, especially for some sub-sectors such as music. Collective management organisations, however, exist also for many other sectors and now European associations of national collective management organisations have been established to further support copyright and related rights. This category encompasses the European collective rights management association (where they exist) as well as the main national rights management bodies that are members (if particularly active at international level).
- **Main industrial stakeholders in Europe:** Although SMEs are predominant across the European cultural and creative industries, Europe also counts internationally-known companies or industrial groups in almost all cultural and creative sub-sectors. These are listed in this third group.
- **Relevant trade fairs and festivals:** Some of the world's largest trade fairs of relevance to CCIs take place in Europe, from visual arts, to cinema, music, fashion and design.
- **Main public institutions and bodies** supporting internationalisation of CCIs in the EU Member States.
- **Programmes of EU Member States** to support the internationalisation of their CCIs.

These stakeholders for CARIFORUM's Film Industry are listed in the following table.



Table A3-1: List of stakeholders for Painting in the selected EU Member States

Type of stakeholder	Name	Website
<i>Main European Trade Bodies</i>	Federation of European Art Gallery Associations (F.E.A.G.A.)	http://www.europeangalleries.org
	International Association of Art (IAA) Europe	http://www.iaa-europe.eu/
<i>Europe-wide Right Holder Associations</i>	European Visual Artists (EVA), Members: SIAE (IT), VEGAP (ES), DACS (UK), etc.	http://www.evartists.org/
<i>Main industrial stakeholders in Europe</i>	Christie's (UK)	http://www.christies.com/
	Sotheby's (UK)	http://www.sothebys.com/
	Van Ham (D) – fine arts auction	http://www.van-ham.com/en.html
<i>Trade fairs and festivals</i>	La Biennale di Venezia (IT)	http://www.labiennale.org
	Foire Internationale d'Art Contemporain – FIAC in Paris (F)	http://www.fiac.com
	Frieze, London (UK)	http://www.friezeartfair.com/
	Art Paris Art Fair (F)	http://artparis.fr/2012/en
<i>Public Bodies</i>	Arts Council England (UK)	http://www.artscouncil.org.uk
	Arts Council of Northern Ireland (UK)	http://www.artscouncil-ni.org
	Arts Council of Wales (UK)	http://www.artswales.org.uk
	Arts Promotion Centre Finland (FI)	
	Centre Européen d'Actions Artistiques Contemporaines (CEAAC) (FR)	
	Centre National des Arts Plastiques (CNAP) (FR)	http://www.cnap.fr
	Creative Scotland	http://www.creativescotland.com



Type of stakeholder	Name	Website
	Danish Agency for Culture (DK)	http://www.kulturstyrelsen.dk/english/
	Estonian Ministry of Culture – <i>Eesti Kultuuriministeerium</i> (EE)	http://www.kul.ee/et
	Italian Ministry of Foreign Affairs - <i>Ministero degli Affari Esteri</i> (IT)	
	Italian Ministry of Cultural Heritage and Activities - <i>Ministero per i Beni e le Attività Culturali</i> (IT)	
	Maison des Cultures du Monde (FR)	
	Spanish Agency of International Cooperation for Development (AECID) – <i>Agencia Española de Cooperación Internacional para el Desarrollo</i> (ES)	
	Spanish Ministry of Education, Culture and Sports	
	UK Arts Council	http://www.artscouncil.org.uk/
	British Council	http://www.britishcouncil.org/new/
	Goethe-Institut	http://www.goethe.de/
	Instituto Cervantes	http://www.cervantes.es/default.htm
	Institut Français	http://www.institutfrancais.com
	Instituto Italiano di Cultura	http://www.esteri.it/mae/it
	European Cultural Foundation	http://www.eurocult.org/
	European League of institutes of the Arts Schools	http://www.elia-artschools.org/
	Organisation Internationale de la Francophonie (OIF)	
Public and Private programmes	“On the Move” (OTM) - a cultural mobility information network active in Europe and worldwide. It informs artists and cultural operators about mobility opportunities, existing funding sources, relevant policy topics	http://on-the-move.org



Type of stakeholder	Name	Website
	related to their cross-border mobility (visas, taxation, social security etc.)	
	OTM Funding Guide Denmark (DK)	http://onthemove.org/files/November%202014%20Funding%20Guides%20Europe/Denmark_MFG_Nov2014.pdf
	DIVA - Danish International Visiting Artists Programme (DK)	http://www.kunst.dk/english/funding/?tx_lftilskudibase_pi7%5Bpage%5D=2
	International Cultural Exchange Projects (DK)	http://www.kunst.dk/english/funding/?tx_lftilskudibase_pi7%5Bpage%5D=
	OTM Funding Guide Estonia (EE)	http://on-the-move.org/files/November%202014%20Funding%20Guides%20Europe/Estonia_MFG_Nov2014.pdf
	OTM Funding Guide Finland (FI)	http://on-the-move.org/files/November%202014%20Funding%20Guides%20Europe/Finland_MFG_Nov2014.pdf
	Artist – in -Residence Grants for individuals and communities (for Finnish artists travelling the Caribbean countries) (FI)	http://www.taika.fi/en/state-grants-and-subsidies/-/stipend/viewCategory/category/28
	HIAP - Helsinki International Artist-In residence Programme (for curators of the Caribbean) (FI)	http://www.hiap.fi/opencall/helsinki-international-curatorial-programme



Type of stakeholder	Name	Website
	OTM Funding Guide France (FR)	http://on-the-move.org/files/November%202014%20Funding%20Guides%20Europe/France_MFG_Nov2014.pdf
	Programme de mobilité - Hors les murs (for French artists travelling to the Caribbean) (FR)	http://www.institutfrancais.com/fr/residences
	Échanges et coopération artistiques: actions de coopération et de diffusion (covering also the Caribbean countries) (FR)	http://ifprog.institutfrancais.com http://www.institutfrancais.com/fr/appels-projets
	Caraïbes en créations (FR)	http://www.institutfrancais.com/fr/afrique-et-caraibes-en-creations http://www.institutfrancais.com/fr/appels-projets
	Culture Lab (FR)	http://www.institutfrancais.com/fr/actualites/culturelab-2014 http://www.institutfrancais.com/fr/appels-projets
	Funds to assist the mobility of artists (<i>Fonds d'aide à la circulation des artistes</i>) (OIF)	http://www.francophonie.org/Fonds-d-aide-a-la-circulation-des.htm
	Visual arts and living arts (<i>Arts visuels et arts vivants</i>) (three programmes of the OIF)	http://www.francophonie.org/Arts-vivants-et-visuels.html
	Assistance with first exhibition (FR)	http://www.cnap.fr/navigation/soutien-la-creation/artistes/soutien-pour-une-recherche-artistique-allocation-exceptionne



Type of stakeholder	Name	Website
	Soutien pour l'étude et la recherche en matière de restauration et de conservation d'œuvres d'art contemporain (FR)	http://www.cnap.fr/navigation/soutien-la-creation/restaurateurs-dart/soutien-pour-letude-et-la-recherche-en-matiere-de-
	Soutien pour le développement d'une recherche aux auteurs théoriciens et critiques d'art (FR)	http://www.cnap.fr/navigation/soutien-la-creation/theoriciens-et-critiques-d%E2%80%99art/soutien-la-theorie-et-la-critique-dart
	Centre de documentation sur les spectacles du monde-Vitré: Résidences de création pour artistes étrangers (FR)	http://www.mcm.asso.fr/site02/vitre/vitre-residences_en.htm
	Résidences internationales et soutiens individuels (FR)	http://ceaac.org/listes/ceaac-international/residences http://ceaac.org/listes/ceaac-international/projets-ponctuels
	Foundation LVMH - Bourses d'études pour des cours de perfectionnement / post-universitaire (FR)	http://www.lvmh.fr/lvmh-une-vocation-de-mecene/la-jeunesse-encourager-les-talents-de-demain/jeunes-creatifs/remise-des-16e-prix-lvmh-des-jeunes-createurs
	Foundation Jean-Claude Reynal (FR)	http://www.rosab.net/bourse-reynal/accueil.php
	Galerie Ho (FR)	http://www.galerieho.com/labo_ho/labo_ho
	Terra Foundation for the Arts (FR)	http://www.terraamericanart.org/grants/academic-program-grants/terra-summer-residency/
	La Galerie, Centre d'Art Contemporain	www.noisylesec.net



Type of stakeholder	Name	Website
	de Noisy Le Sec (FR)	
	Maison des Arts Georges Pompidou (FR)	http://www.magp.fr/presentation/modalites-daccueil/
	The Brown Foundation Fellows Programme (FR)	http://www.mfah.org/fellowships/doramaarhouse/fellowship/
	Ecole nationale supérieure d'arts – Bourges (FR)	http://www.ensa-bourges.fr/index.php/en/galerie-la-box/appels-a-candidatures/projet-curatorial
	ArtsLant Foundation (FR)	http://www.artslant.com/la/foundation
	OTM Funding Guide for Germany (DE)	http://on-the-move.org/files/November%202014%20Funding%20Guides%20Europe/Germany_MFG_Nov2014.pdf
	Berliner Senatskanzlei (DE)	http://www.touring-artists.info/444.html?&L=1&cHash=7acde0907cfd784791760573dd8bfee0-c393
	Villa Aurora (DE)	http://www.villa-aurora.org/en/artists-grants.html new link: http://www.villa-aurora.org/en/artists-grants.html
	Künstlerhaus Bethanien – Residency	http://www.touring-artists.info/884.html?&L=1&cHash=7acde0907cfd784791760573dd8bfee0#c1454
	Künstlerhaus Schwalenberg Residency (DE)	http://www.touring-artists.info/321.html?&L=1&cHash=7acde0907cfd784791760573dd8bfee0#c267



Type of stakeholder	Name	Website
	Künstlerhaus Stuttgart (DE)	http://www.touring-artists.info/253.html?&L=1&cHash=7acde0907cfd784791760573dd8bfee0#c199
	Land NRW/ Stadt Düsseldorf – Grant visual arts (DE)	http://www.touring-artists.info/926.html?&L=1&cHash=7acde0907cfd784791760573dd8bfee0#c150
	OTM Funding Guide for Italy	http://on-the-move.org/files/November%202014%20Funding%20Guides%20Europe/Italy_MFG_Nov2014.pdf
	Movin'up –International mobility of young Italian artists (For Italian artists travelling to the Caribbean countries (IT)	http://www.giovaniartisti.it/
	Fondazione CRT (IT)	http://www.fondazione crt.it/attività/ricerca-e-istruzione/2014-master-dei-talenti-neolaureati.htm
	The French Academy in Rome (IT)	http://www.villamedici.it/en/residencies/academic-selection/
	Rockefeller Center in Bellagio (IT)	http://www.rockefellerfoundation.org/bellagio-center/residency-program/arts-literary-arts-residency
	Bellagio Creative Arts Fellows Program (IT)	http://www.rockefellerfoundation.org/bellagio-center/bellagio-creative-arts-fellows
	VIR Viafarini-in-residence (IT)	http://www.viafarini.org/italiano/vir.htm



Type of stakeholder	Name	Website
	Residency "Diogene Bivaccourbano" (IT)	http://www.progettodiogene.eu/?page_id=392&lang=en
	UNIDEE - University of Ideas (IT)	http://www.cittadellarte.it/attivita.php?att=27#sub
	International Network for Art Residences and Educational Programs - RES.Ò Project (Promoted by the Foundation for Modern and Contemporary Art –CRT) (IT)	http://www.resonetwork.net/APPLICATIONS.htm
	OMT Funding Guide for The Netherlands	http://on-the-move.org/files/November%202014%20Funding%20Guides%20Europe/Netherlands_MFG_Nov2014.pdf
	Hivos Cultuurfonds_NL	http://www.hivos.nl/Campagnes/Cultuurfonds/Aanvragen
	Arts Collaboratory –Hivos and Doen Foundation in collaboration with the Mondriaan Foundation	http://artscollaboratory.org
	Doen Foundation	http://www.doen.nl/web/applications/Criteria-Exclusions/Culture-Cohesion.htm
	Mamacash	http://www.mamacash.org/
	Residency: Municipal Museum Office Amsterdam -Stedelijk Museum Bureau Amsterdam; CBK Zuidoost–Center of Visual Arts -Centrum BeeldendeKunstZuidoost; FLAT Foundation -Stichting FLAT	http://www.smba.nl/en/residencies/
	Residency: Art House SYB -Kunsthuis SYB	http://www.kunsthuis-syb.nl/projectvoorstel-indienen.html
	Residency: NDSM Treehouse-NDSM in den bomen	http://www.indebomen.nl
	Residency: DordtYart	http://dordtyart.nl/index.php?cat=artist_in_residence-1&cat_info=true



Type of stakeholder	Name	Website
	OTM Funding Guide for Spain	http://on-the-move.org/files/November%202014%20Funding%20Guides%20Europe/Spain_MFG_Nov2014.pdf
	AECID	http://www.aecid.es/es/convocatorias/
	MATADERO Madrid	http://www.mataderomadrid.org/convocatorias/3164/zinc-shower-2014.html
	Bilbao Arte	http://bilbaoarte.org/?page_id=41&lang=en
	<i>Centro de Estudios del Jiloca</i>	http://www.xiloca.com/espacio/?page_id=75
	<i>El Instituto Rural de Arte Hoz del Júcar</i>	http://www.karrvaz.com/
	Halfhouse	http://www.halfhouse.org/residencia.html
	OTM Funding Guide for the UK	http://on-the-move.org/files/November%202014%20Funding%20Guides%20Europe/UK_MFG_Nov2014.pdf