Development of a Regional Export Strategy for the Creative Industries Services

VALUE CHAIN ANALYSES

FINAL REPORT

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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

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The research was conducted over several months culminating in May 2015 in all 16 CARIFORUM countries and 9 European Union Member States (Denmark, Estonia, Finland, France, Germany, the Netherlands, Spain, Sweden and the United Kingdom). It involved desk research, interviews with approximately 75 individuals in the EU, and an online survey which garnered inputs from more than 400 creative professionals across CARIFORUM in the 6 creative industries being explored: Music (recorded and live), Film, Fashion, Jewellery, Painting, and Arts & Craft.

On the CARIFORUM side, the fieldwork 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. The authors particularly wish to acknowledge the contributions of: Andrea King (Barbados), Jacklyn Castillo (Belize), Lucilla Lewis (Dominica), Carlos Delgado Imbert (Dominican Republic), Christopher DeRiggs (Grenada), Enrico Woolford (Guyana), Louise Carmel Bijoux (Haiti), Damaris Mayne (Jamaica), Nerissa Greenaway-Golden (Montserrat), Telojo Onu (St. Kitts & Nevis, St. Vincent & Grenadines), Barbara Jacobs Small and Finola Prescott (St. Lucia), Farley Joseph (Trinidad and Tobago), and Donald Demeritte (The Bahamas).

The Caribbean is fortunate to have so many individuals who are highly knowledgeable and with considerable experience in all aspects of the CARIFORUM Creative Industries. The authors' heartfelt thanks are extended to all those who took part in the research, for having shared their expertise with such generosity and enthusiasm.

The contents of this report reflect the collated information and its interpretation by the authors, and not necessarily the views of the Local Experts or the Agency. Feedback and questions are welcome:

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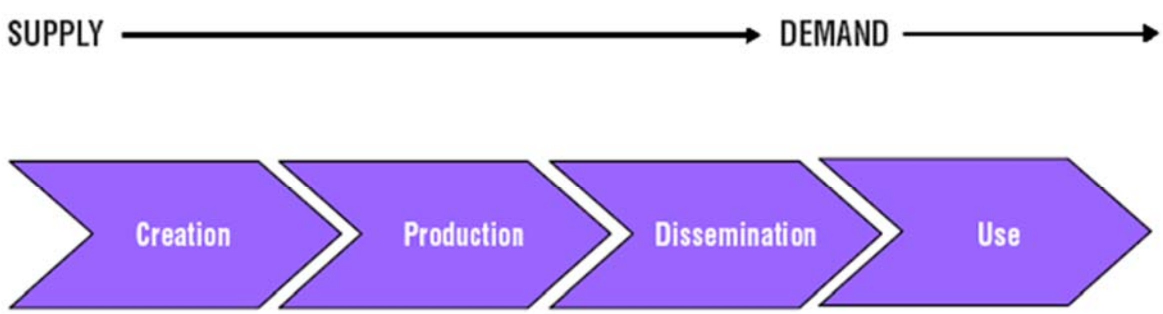
1. Introduction

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 Creative Industries, their 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: List of the selected CARIFORUM Creative Industries with export potential

CCIs sectors	Related Services	Related Goods (physical and intangible[2])
Music	Recorded Music Music publishing (composers and lyrics) Recording studios Collective Rights Management (Royalties and license fees) Music radio stations TV music channels Live music Performance management services Booking services Support and technical activities producing live events (including venues) Collective Rights Management (Royalties and license fees)	Recorded music - CDs and digital formats Merchandising

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

CCIs sectors	Related Services	Related Goods (physical and intangible[2])
Film	Production of audio-visual (AV) works and associated services e.g. sound recording Location services Distribution of AV works Promotion of AV works Exhibition and screening of AV works Royalties and license fees	Films & AV works – 35 mm, CDP and formats
Fashion	Fashion design and distribution	Textiles, clothing, apparel, footwear, leather goods and accessories (e.g. handbags). *Jewellery is discussed separately (see below).*
Jewellery	Jewellery design	Jewellery
Painting	Conventions and events Promoting services Temporary exhibitions Trade fairs/Art Market On-line sales services Museums	Paintings (including digital formats)
Arts and Craft	Artistic Craft Exhibitions and Trade (All Inclusive E-Commerce)	Emphasis was placed on products which are based on indigenous materials, techniques, skills etc.

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:
    - 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).
    - 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.
    - Online questionnaire (survey) was designed in SurveyMonkey for use across the Caribbean by the core team and Local Exports in consultations with creative practitioners.
    - 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, international partnerships as well as cooperation arrangements such as 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.

Reports

Industry-specific Value Chain Analysis (VCA) Reports, following a format similar to this one, were 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 this 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 this Final Report.

The recommendations consolidate the authors' findings regarding both the **supply (CARIFORM) side** and the **demand (EU) side**. For the former, the survey results are presented for the 410 creative professionals involved in one/more of the creative industries under review (as of 31st May 2015) and based in 15 of the 16 CARIFORUM countries.

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 and/or industries. The authors therefore hereby acknowledge that neither the industry-specific reports nor this Final Report present a *definitive* characterisation of the CARIFORUM CIs; rather, they are presented as a foundation upon which to build.

The use of a *single* SurveyMonkey instrument – which was in English only – is considered another limitation. Whilst the survey used "plain English" as much as possible and took advantage of SurveyMonkey's inbuilt skip logic, the language was not always very accessible to the creative professionals asked to complete it – whether because they were not practiced in looking at their creative output in business-like terms, or because English was not their primary language. For both, the Local Experts were enormously helpful in translating the concepts as well as the language. In a number of countries (notably, the Dominican Republic and Haiti), the Local Experts talked their respondents through the survey over the phone (or face to face) and completed the SurveyMonkey form on the respondents' behalf.

It must be noted that one of the areas of concern for the authors and the network of Local Experts was the mistrust that is commonly found in the creative community which prevents the free sharing of information. Whilst instances of this happened, the central involvement of the Local Experts – who were, without exception, active and respected professionals in one (or more) of the CCIs, and based in their country – is considered pivotal to the success of this survey methodology. They were able to encourage fellow creative professionals in their communities to take part in the survey and to share very valuable information. The authors appreciate the support and industry-validation which was provided by each of the Local Experts involved.

2. Mapping the Value Chains for CARIFORUM CIs

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 chains are discussed in Section 3.3.1, and presented in Figures 2a-f with the survey respondents mapped to each activity. The actual numbers of respondent involved in each type of activity are given in the tables in Annex 1.

3. Market Opportunities for CARIFORUM CIs

3.1. EPA Protocol on Cultural Cooperation

The EC-CARIFORUM Economic Partnership Agreement (EPA) Protocol establishes a framework within which the Parties can co-operate with a view to facilitating exchanges of cultural activities, goods and services and to improving the conditions governing such exchanges. The Protocol features a combination of binding and best endeavour measures aimed at enhancing the capacity of Parties to develop and implement cultural policies and to strengthen their cultural industries, notably through enhanced exchange opportunities accorded on a preferential basis[3]. There may also be opportunities to access funding through the proposed EU Cultural Support Programme[4] as well as through cooperation agreements with the EU and through partnerships with the FCORs.

It should be noted that there is a view that the EPA may have narrowed the scope of temporary presence of service workers (Mode 4) as it covers only the managerial elite, professionals, technical experts and a limited category of contract service suppliers. The temporary entry of service workers in lower value jobs falls outside the legal scope of the EPA and remains an immigration (not trade) matter. There are also many restrictions on the eligible service workers. Regarding quota-free right of entry for Caribbean entertainers, the Caribbean Cultural Industries Network has said that major artists had little difficulty entering Europe in the past and caution that the new requirements for a regional registration and certification regime would have made famous artists like Bob Marley ineligible for entry[5].

In addition to music, segments of particular interest to the CARIFORUM region include audio-visuals, festivals, fashion, design, art, the performing arts (especially theatre) and literature. Opinions differ regarding the near-term prospects and potential economic impact of many of these segments. At the same time, the window of opportunity provided by the emergence of new technologies and their potentially empowering effect within the region cannot be under-estimated. Of particular significance is their ability to provide unprecedented accessibility for and to the region's creative producers and distributors, thus reducing their dependence on trans-national companies for marketing, and creating the possibility for deriving benefits across the industries' value chains. Many creative products are utilizable/transmittable via a range of

[3] The EC-CARIFORUM Economic Partnership Agreement: Assessing the Outcome on Services and Investment. Pierre Sauvé and Natasha Ward. January, 2009.

[4] Market Access Issues for Cultural Goods in the European Union: Jean Michel Salmon, 2005. This refers to a proposal for an EU Cultural Support Programme with a budget of 408M Euros to (i) support transnational mobility of cultural service providers (ii) encourage circulation of cultural works and (ii) promote intercultural dialogue. Note 13 quotes from the proposal "the programme intends to be more open to participants from third countries, particularly countries covered by the new neighbourhood policy, and to support projects running outside the borders of the EU" (EC 2004b, p. 7) and clarifies that "Article 5 of the Decision Draft Proposal is enumerating eligible third countries, including 'third countries which have concluded association or cooperation agreements which include cultural clauses".

[5] EU EPAs: Economic and Social Development Implications: The case of the CARIFORUM-EC Economic Partnership Agreement. Third World Network (TWN), February 2009.

platforms that were non-existent as recently as a decade ago. Similarly, many creative products may be multi-purposed across different platforms or via different media. On the platform of the internet, the consumption of an offer may take place as and when the consumer requires it. This has created a new window for the creative producer – as well as expanded his/her potential income streams.

3.2. Summary of trends in the EU for the CIs

These sections contain a summary only of the information and data contained in the industry-specific reports. As such, the authors recommend that the industry-specific VCA Reports be read for fuller details as well as the underpinning source/reference materials.

3.2.1 For Music

Europe has four of the ten biggest music markets in the world (Germany, UK, France and Italy). There are thousands of music companies, both major record labels and small independent record companies that invest heavily in new talent every year and produce many new releases. In particular the small companies are the key employers in the music sector in the EU and ensure that there is a great diversity in music.

Nonetheless, it is the (large) record labels, publishing companies and digital music services which play the dominant roles in the value chains for music. The collective rights organisations also play an important role, and in the EU they redistribute more than €4.3 billion to their members such as the creators and the publishers that form the first link in the value chain.

By contrast, whilst musicians, songwriters, lyricists and composers are at the core of the value chain of the music industry, they are economically less significant; and this results in many who fulfil these roles having little or no job security, often turning to a second job to sustain themselves.

The recorded and live music sectors are very much two sides of the same coin in Europe. There has been an increase in the performance of live music as well as a small increase in the sales of recorded music.

Recorded Music

Digital revenues are derived from both downloads and streaming. Europe has witnessed a strong increase in streaming in recent years. According to IFPI, the international trade body representing the recording industry worldwide, digital sales have accounted for 39% of global recorded music trade revenues in 2014; of these sales, 32% took place in Europe (IFPI Digital Music Report 2015). The year-on-year increase in market share is expected to continue to grow in the coming years. The emergence of a wide range of legal music streaming and downloading services has positively impacted the music industry.

Currently Europe is the world leader in streaming services, with the world's two leading companies based there - Spotify (Sweden) and Deezer (France). In 2013, there were an estimated 230 online music services were available in Europe, offering more than 37 million tracks in every country.

Apart from the music delivery services, the recording and publishing industry is also in the process of being transformed into a global digital business. Europe is home to the world´s leading record company: the Universal Music Group. Both its major and independent record labels have embraced new business models to deal with the shift from the sales of CDs to online music sales.

Live Music

According to a recent EY study, concerts and music festivals accounted for more than one-third (37%) of the global performing arts revenues in 2011. Revenues have been growing since 2010 and further increases are expected in the near future.

The competition among festivals has increased, and is now a major issue for festival organisers. In the last ten years, there has been a 500% increase in the number of local and international open-air music events. Festival organisers have come under pressure to reduce the price of entrance tickets and increase the production costs. More than ever they need to specialize, attract big names and improve their facilities. This has also forced festival organizers to embrace digital technologies to innovate their festivals (communication with audience via social media channels, digital payment systems, live streaming, etc.).

Open-air festivals are significant employers and they tend to hire mainly local, well-trained and educated manpower. In many cases, the host communities derive benefits through provision of goods and services to attendees. In general all types of performances play an important role in attracting tourism in Europe. For example, 9.2% of tourists visiting the UK went to the theatre, a musical, opera or ballet.

The European Forum of Worldwide Music Festivals (EFWMF) is a network of festivals focusing on global music and local cultures. It initiated the worldwide music expos WOMEX and STRICTLY MUNDIAL, and is closely connected to various music markets and events worldwide. The network has 45 festival members, representing a wide variety of European world music festivals. The diversity of these festivals equals this of world music: ranging from a small scale thematic bagpipe-festival in Italy to eclectic mega-festivals of 200,000 visitors. Together the EFWMF-festivals reach more than 3 million people in Europe, and invites hundreds of artists to its festivals all year round.

Membership is for all festival organizers with a worldwide approach, presenting music in the area of world, ethnic, traditional, folk and roots music.

3.2.2 For Film

In Europe, the digitalization and recent consumption trends have severely affected the film industry. The sales of DVDs has been decreasing by around 12 % every year, due, according to the trade organisations, primarily to increases in piracy and illegal downloading.

Most European films are rough versions, with the makers attempting to secure financial resources to progress upgrade production quality etc. European film producers therefore try to secure co-production partners so as to share the costs, and will also try to get funding from public authorities. To further finance the film, the producer more often than not will attempt to pre-sell the distribution rights of the film to sales agents and exhibitors.

Every year, EU Members States make around €2 billion available for the production of films in the form of soft loans, grants and tax incentives. Public funding is vital for the European film sector both to reduce risks and as an inducement for the attraction of investments from other entities such as private equity investors.

In the emerging digital era, one challenge will be to attract and secure financial commitments from new online distribution companies at the pre-financing stage. Also, the film industry will need to be rewarded for its investments and the creators and right holders will need to be paid if films are made available of digital platforms. Only in this way can new investments be made in the production of new films.

3.2.3 For Fashion

The value chain of the fashion industry in the EU embraces design, manufacturing of materials and fashion goods (such as textiles, clothing, footwear, leather and fur products, jewellery and accessories), as well as their distribution and retail to final consumers.

European clothes and textiles are coveted the world over, not just in China, but also in many other parts of the world such as the USA, Hong Kong and Russia. The total EU export of clothes and textiles has increased in the past few years and European fashion has become popular.

In recent years the fashion industry in the EU has however been under pressure to restructure and modernize. The following factors contributed to the need to make changes: trade liberalization and external competition; consumer developments; technological advances; production and logistic costs; and environmental issues

To meet the new global challenges, the EU fashion industry is currently moving towards:

- Innovative and high value products, processes and services as it cannot compete on price with emerging economies
- Niche markets
- New brands
- New business models

3.2.4 For Jewellery

The EU is the world's second largest jewellery market, after the USA. White metals, platinum, precious stones, diamonds and pearls are popular; and yellow gold is popular again.

Traditionally, the European jewellery market has been focused on the luxury sector but news trends are occurring such as the do-it-yourself jewellery, especially after the 2008 economic crisis and the decrease of jewellery sales through consumers being cautious in their spending on precious jewellery. The jewellery market has been forced to decrease prices, although the luxury sector has been able to maintain its sales thanks to the tourism and exports opportunities with respect to both China and Russia.

Branded jewellery has become a growing segment. This is particularly the case In Italy, where more than 30,000 companies are involved in the jewellery market and related services. As for the export figures, Italy was the second largest EU exporter of jewellery (28%) and the second largest volume supplier (4,664 tonnes), after the UK (4,766 tonnes) in 2007.

The jewellery sector is linked to others related sectors such as fashion, optical sector, accessories and handbags.

More than a decade ago, the EU undertook to promote the modernization and development of its jewellery industry and founded the VI-JET project in 2002 to set up the European Jewellery Institute (EuJi) with a mission to improve the competitiveness of the European jewellery industry. Twelve EU Member States participated in the project and established a knowledge and expertise platform for the jewellery sector. In this platform, a number of universities, research centres, training institutes and management consultancies worked closely together with the jewellery sector (SMEs and stakeholders). The main benefits of the work of the EuJI have been:

- European jewellery SMEs can access the most advanced technologies, contemporary design tools, innovative process features and products, the latest marketing techniques, training programmes and diagnostics methods on a previously non existing scale; and
- Networks of experts and local helpdesks have been set up to facilitate contact between SMEs, associations and institutions to extend the range of services offered.
- The exchange of skills and constant sector monitoring provides important input to the European Commission for the development and promotion of research programmes, thus guaranteeing results of focused strategic value.

According to the sector report prepared by the CBI in the Netherlands, the sluggish economic development in 2013 had a negative impact on the production and import of jewellery and accessories in Europe. France, the UK, Germany, Italy and Spain were the leading importers.

The total imports of jewellery and accessories into Europe amounted to a total value of € 16 billion - 18% originated from developing countries, such as, China (33%), Thailand (30%), India (17%), Turkey (10%), Vietnam (2%), Mauritius (1%), Philippines (1%) and Mexico (1%).[6]

3.2.5 For Painting

Paintings are part of the visual arts sector in Europe. Specific data on paintings is scare, 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. 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 recent 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.

3.2.6 For Arts & Craft

The Arts and Craft sector is not clearly defined in the EU, but can be considered part of the Jewellery and Visual Arts sector. The turnover in 2011 was estimated to be €46,337 million.

Currently changes are being made to the classification methods of the crafts sector to ensure that it is also part of the creative industries. For example, the definition of the craft sector was recently revised in the UK to cover the manufacture of jewellery under the Standard Industrial Classifications (SICs) as well as the following occupations under the Standard Occupational Classifications (SOCs): smiths and forge workers, weavers and knitters, glass & ceramics makers, decorators & finishers, furniture makers and other craft woodworkers.

In Spain, the crafts sector covers wooden furniture (40 %), jewellery and textile (11% to 12%) and ceramics and leather (6%). The number of companies working with in other subsectors such as marble, stone and plaster, metal, glass, wooden objects and musical instruments is very low.

[6] Source: Eurostat (updated in September 2014)

3.3. Trends in CARIFORUM for the CIs

The following discussion is based on the results collected through this survey exercise for the **410 professionals** involved in one/more of the creative industries under review (as of 31st May 2015). They are based in 15 of the 16 CARIFORUM countries.

In several instances, the industry-specific datasets are discussed: 117 respondents involved primarily in Music (live and recorded), 55 in Film, 53 in Fashion, 35 in Jewellery, 33 in Painting, 62 in Arts & Craft, and 55 in 'Other' (a mixture of these CCIs/sub-sectors). The full detail for each of these Creative Industries (CIs) is given in their respective industry-specific Value Chain Report.

3.3.1 Characteristics of CARIFORUM Creative Industries professionals

- Of the 410 CIs respondents, most are involved in the "creation" stages of their respective value chains. To a lesser extent, they are also involved in certain activities of both the "production" and "distribution" stages. Their distribution along the industry-specific value chains is illustrated in Figures 2a-f; and the actual number involved in each type of activity is given in the industry-specific tables in Annex 1.
- Almost all CIs professionals work in more than one industry – their primary one, plus varying numbers and combinations of others.

Figure 2a: Mapping of respondents along Value Chain for CARIFORUM Music (recorded & live)

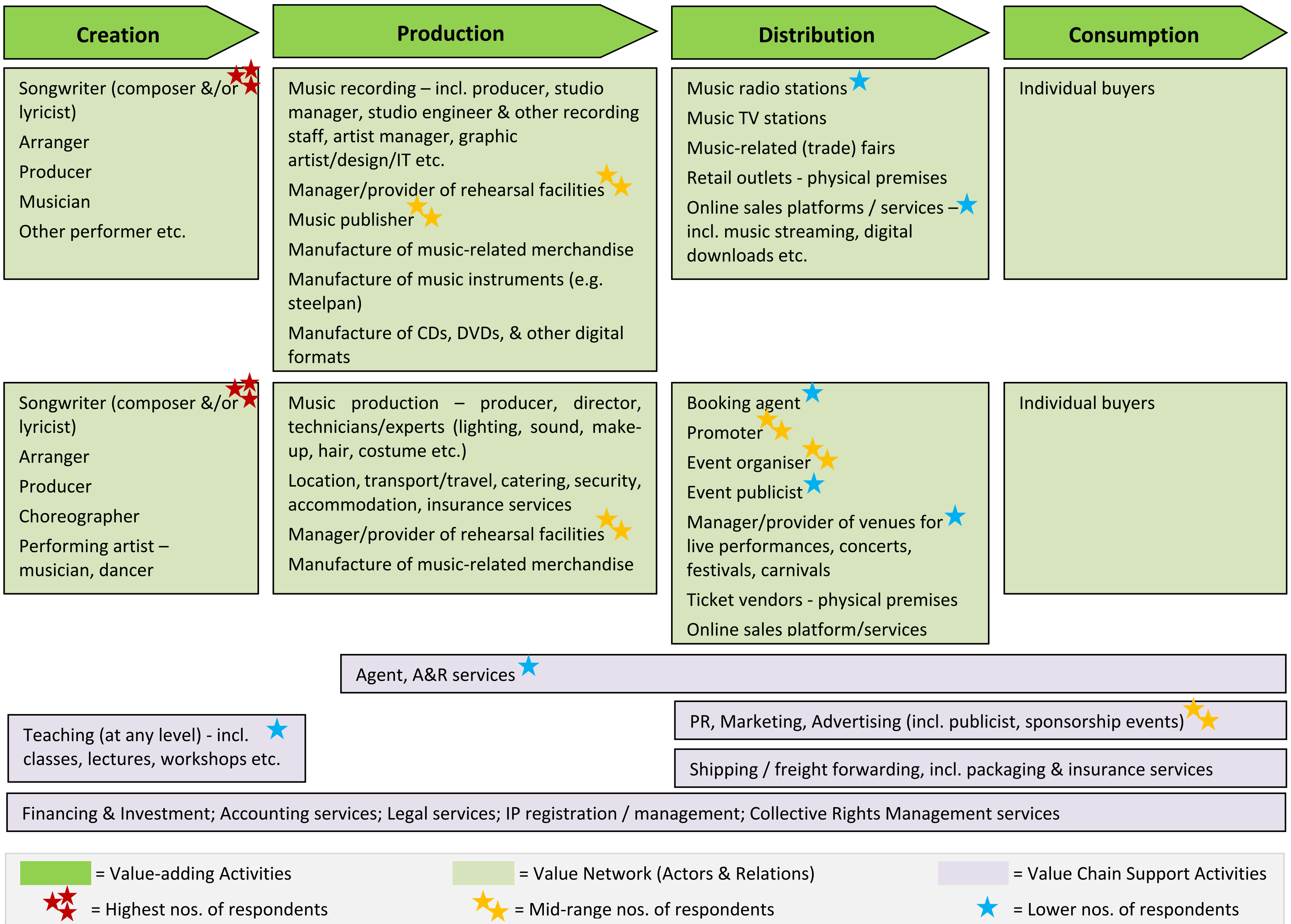


Figure 2b: Mapping of respondents along Value Chain for CARIFORUM Film

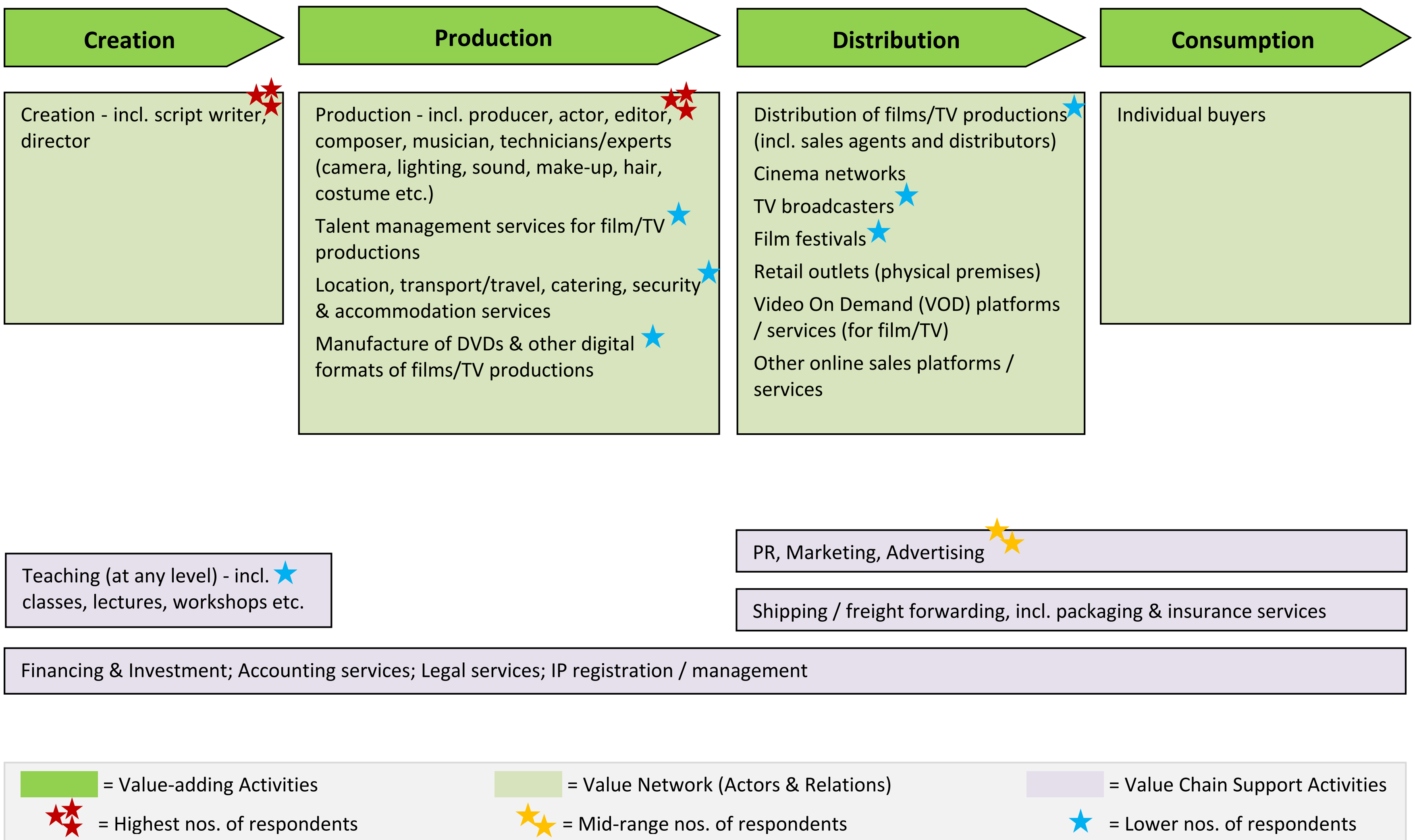


Figure 2c: Mapping of respondents along Value Chain for CARIFORUM Fashion

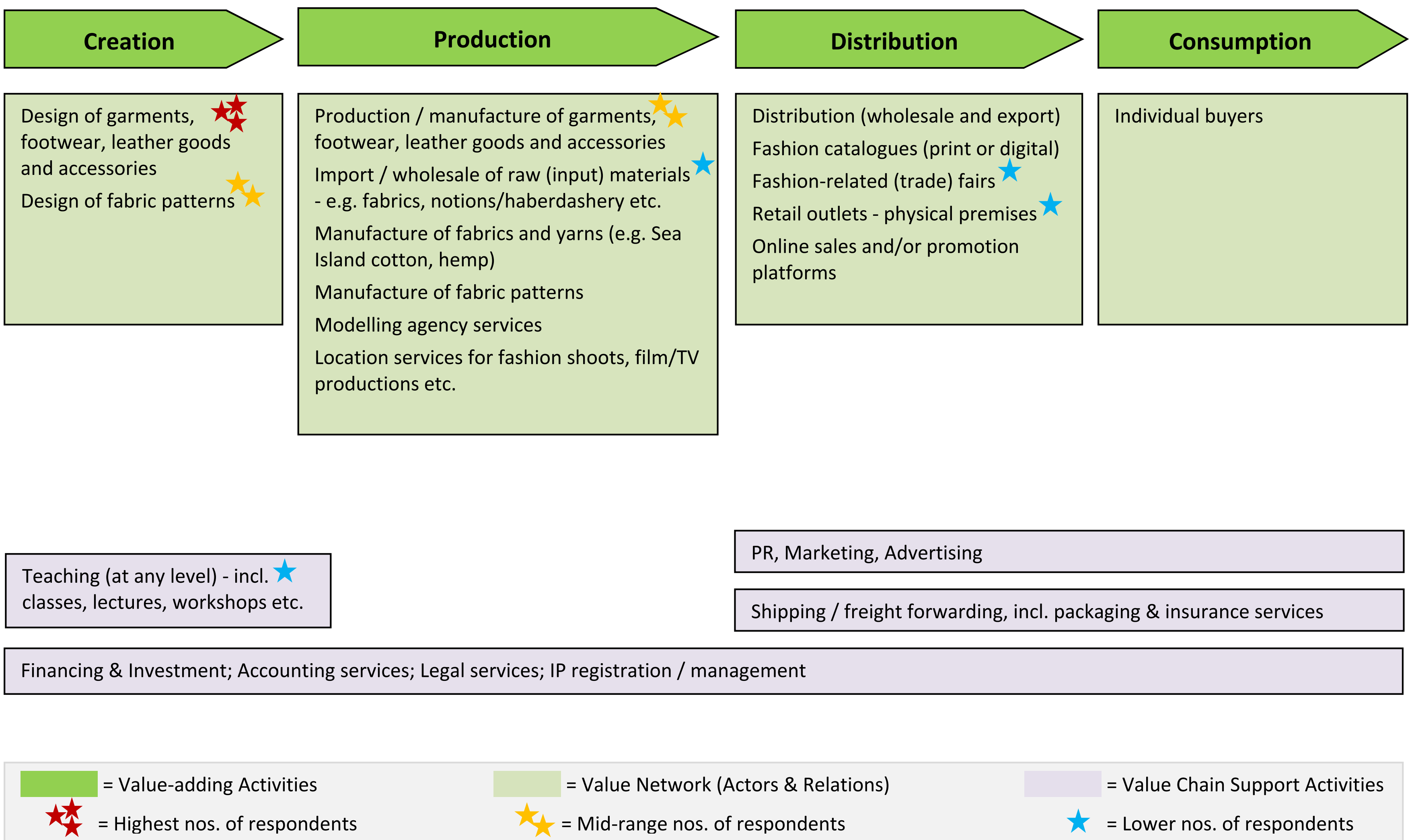


Figure 2d: Mapping of respondents along Value Chain for CARIFORUM Jewellery

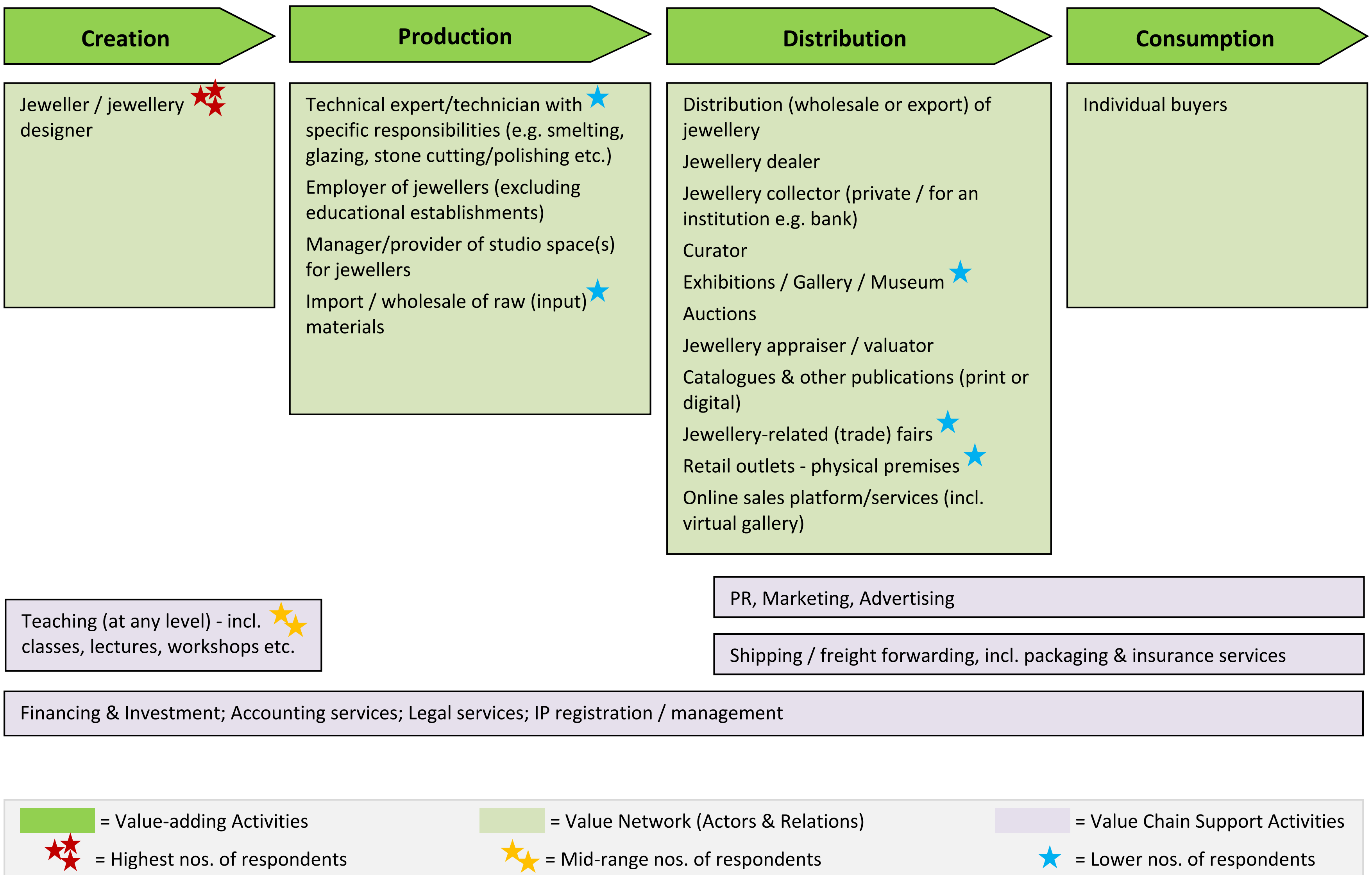


Figure 2e: Mapping of respondents along Value Chain for CARIFORUM Painting

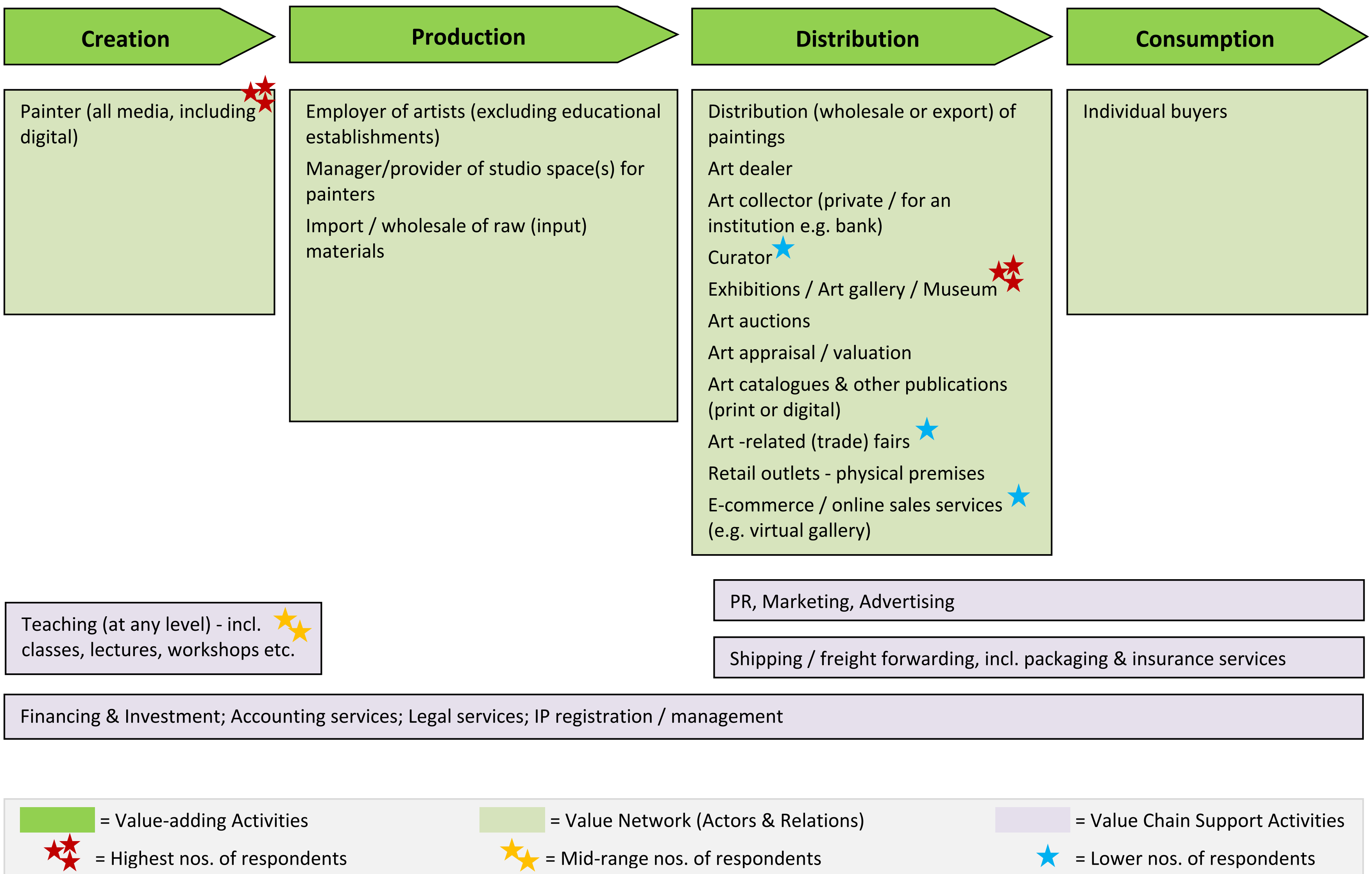


Figure 2f: Mapping of respondents along Value Chain for CARIFORUM Arts & Craft

Creation

Craft-maker / Artisan / Designer

Production

Technical expert/technician with specific responsibilities (e.g. weaving, dyeing/fixing, glazing, cutting /polishing)

Employer of craft-makers / artisans (excluding educational establishments)

Manager/provider of studio space(s) for jewellers

Import / wholesale of raw (input) materials

Distribution

Distribution (wholesale or export) of arts & craft

Artisanal / craft-related (trade) fairs

Catalogues & other publications (print or digital)

Retail outlets - physical premises

Online sales platform/services

Consumption

Individual buyers

Teaching (at any level) - incl. classes, lectures, workshops etc.

PR, Marketing, Advertising

Shipping / freight forwarding, incl. packaging & insurance services

Financing & Investment; Accounting services; Legal services; IP registration / management

= Value-adding Activities
= Value Network (Actors & Relations)
= Value Chain Support Activities
= Highest nos. of respondents
= Mid-range nos. of respondents
= Lower nos. of respondents

- Overall, nearly 80% of respondents fully own their business; and almost 75% have their business registered under their country's national law.
- Overall, 58% of respondents work in their business full-time, the remainder (42%) work part-time.

  Industry-specific variation:

  » Music (recorded & live) – 50% full-time, 50% part-time.

  » Film - About 60% full-time, 40% part-time.

  » Fashion – 70% full-time, 30% part-time.

  » Jewellery - 55% full-time, 45% part-time.

  » Painting - 67% full-time, 33% part-time.

  » Arts & Craft - Almost 70% full-time, 31% part-time.

- 32% have full-time (FT) employees, of whom the majority had 1-4 FT employees (71%) followed by 5-9 FT employees (19%). By contrast, 56% had part-time (PT) employees; and of these, 75% had 1-4 PT employees, 10% had 5-9 PT employees, 7% had 10-15 PT employees, and 8% had > 16 PT employees. Of note is that almost 5% had 21+ PT employees.
- Overall, 59% of the respondents provide both services and goods (whether physical or 'intangible' (virtual, digital); 17% provide only service(s) and 24% only goods.

  Industry-specific variation:

  » Music (recorded & live) - Almost 60% provide both Music-related services and goods; 26% provide only music-related service(s); and 16% only music-related goods.

  » Film - 73% provide both Film-related services and goods; 25% provide only service(s); and 2% only goods.

  » Fashion - More than 60% of respondents provide Fashion-related services and goods; 4% provide only service(s); and 31% only goods.

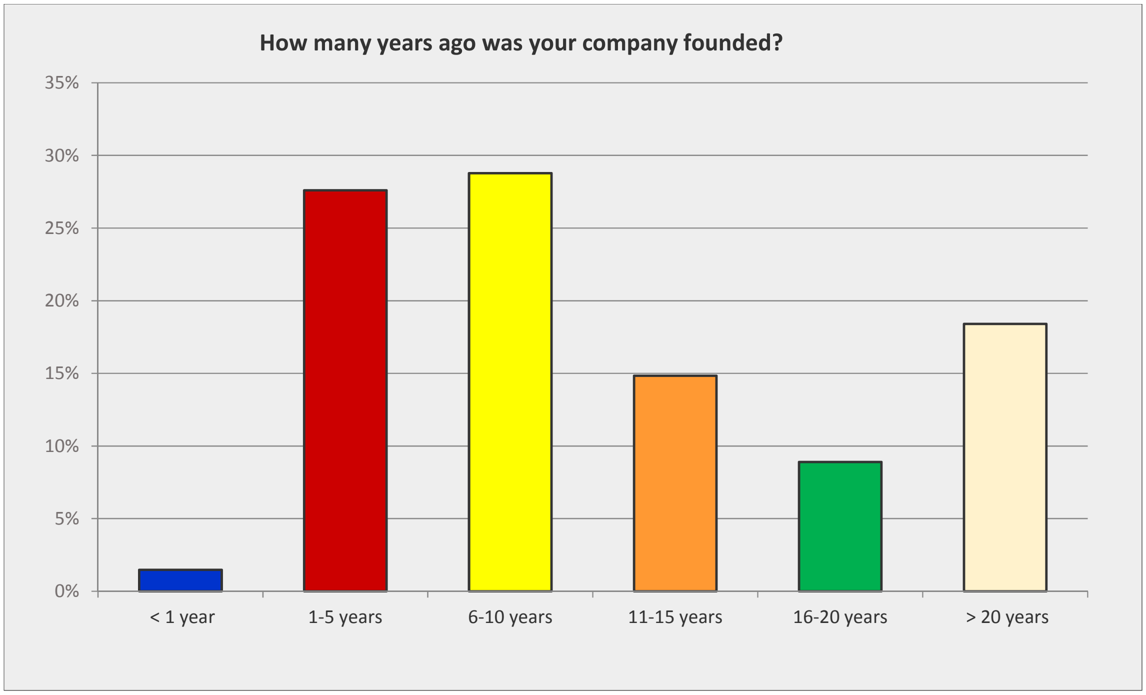
  » Jewellery - 70% provide both Jewellery-related services and goods; and the remaining 30% only goods. None of the respondents provide only service(s).

  » Painting – More than 65% provide both Painting-related services and goods; 31% provide only goods; and 3% only service(s).

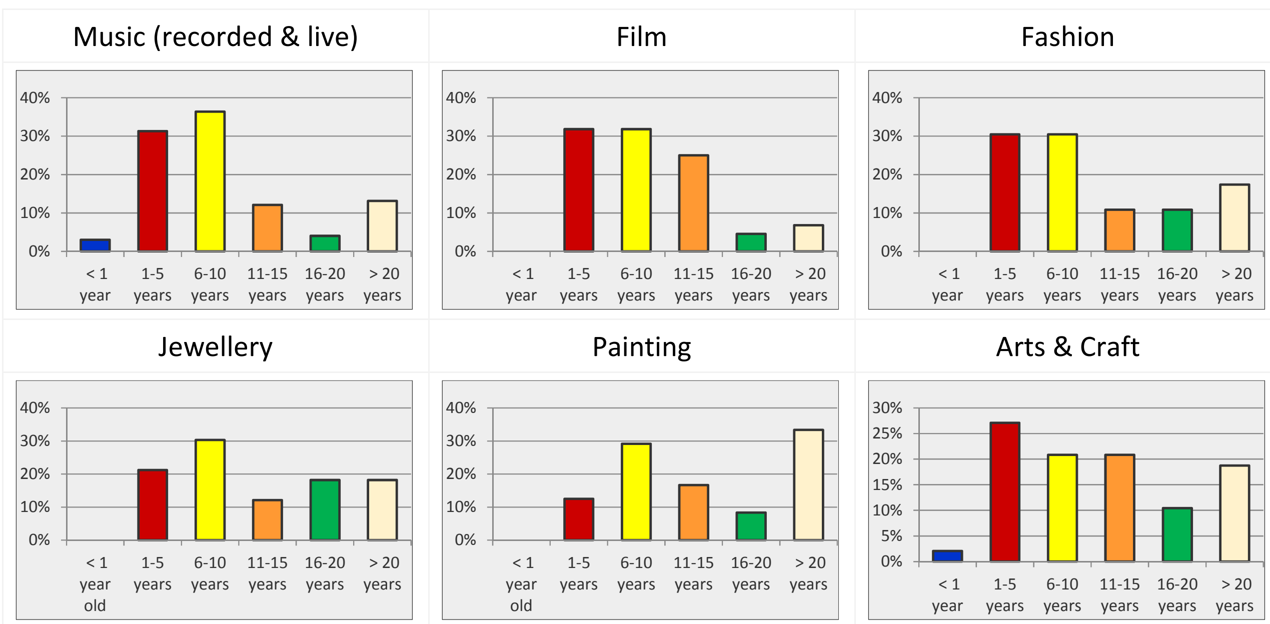
  » Arts & Craft - 38% of respondents provide both Arts & Craft-related services and goods; 8% provide only service(s); and 54% only goods.

- There is a considerable spread in the longevity of respondents' businesses, from < 1 year to 50+ years. The majority however fall within the 1-5 year and 6-10 year ranges (each 27-28% of respondents), followed by > 20 years (18% of respondents). The industry-specific variation is indicated, also in Figure 3.

Figure 3: Company age range for CARIFORUM Creative Industries respondents



Industry-specific variation:

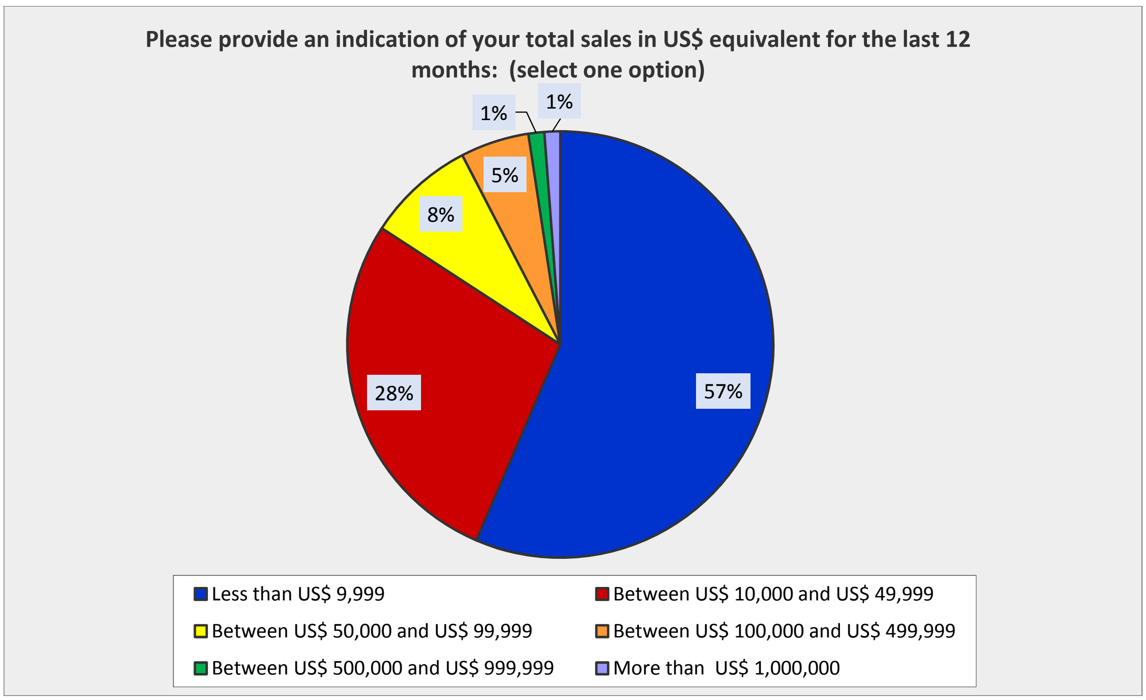


3.3.2 Current export activities of CARIFORUM CIs professionals

- In terms of their last 12 months, 56% of all respondents recorded sales of < US$ 9,999; 28% of US$ 10,000 - US$ 49,999; and 8% of US$ 50,000 - US$ 99,999. The remainder (2%) noted sales of > US$ 100,000 (- four respondents indicated sales of > US$ 1 million). This is illustrated in Figure 4a, with the industry-specific variation also given.
- Considering only *exports* for the last 12 months, 70% of respondents overall indicated

sales of < US$ 9,999; 18% of US$ 10,000 - US$ 49,999; and 8% of US$ 50,000 - US$ 99,999. The remainder (4%) noted sales of > US$ 100,000. As such, it can be seen that - *overall* - exports already constitute a significant component of sales for the CIs professionals who responded to this survey exercise. Notwithstanding, there is variation between industries as illustrated in the industry-specific charts below.

Figure 4a: Comparison of total sales for CARIFORUM CIs respondents



Industry-specific variation:

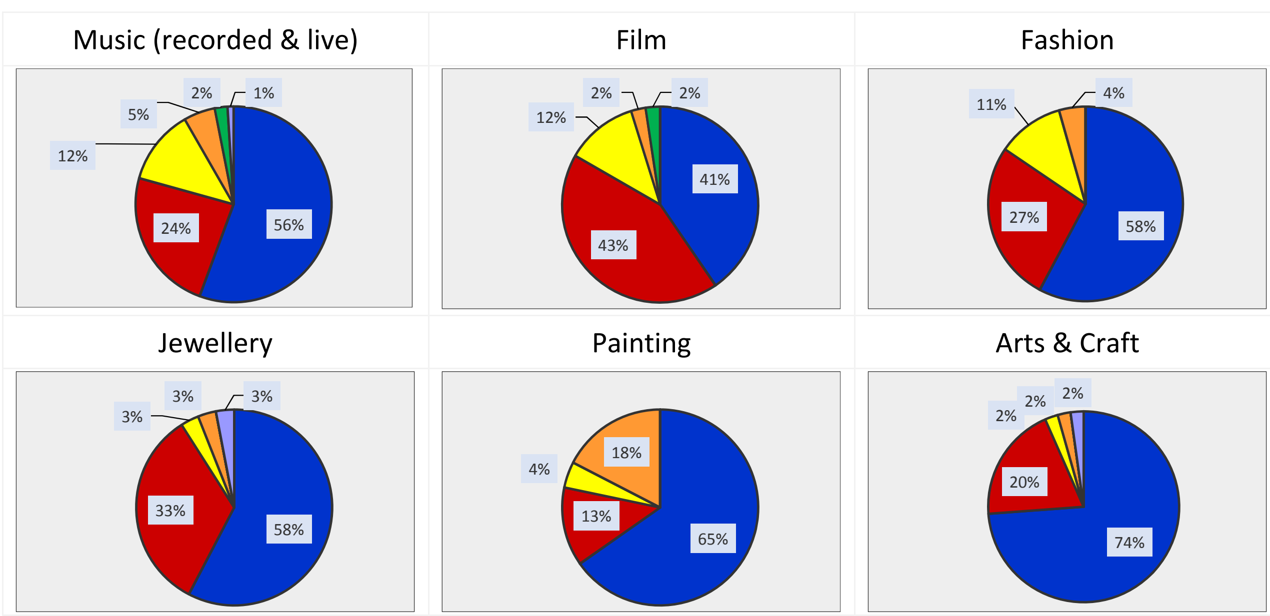
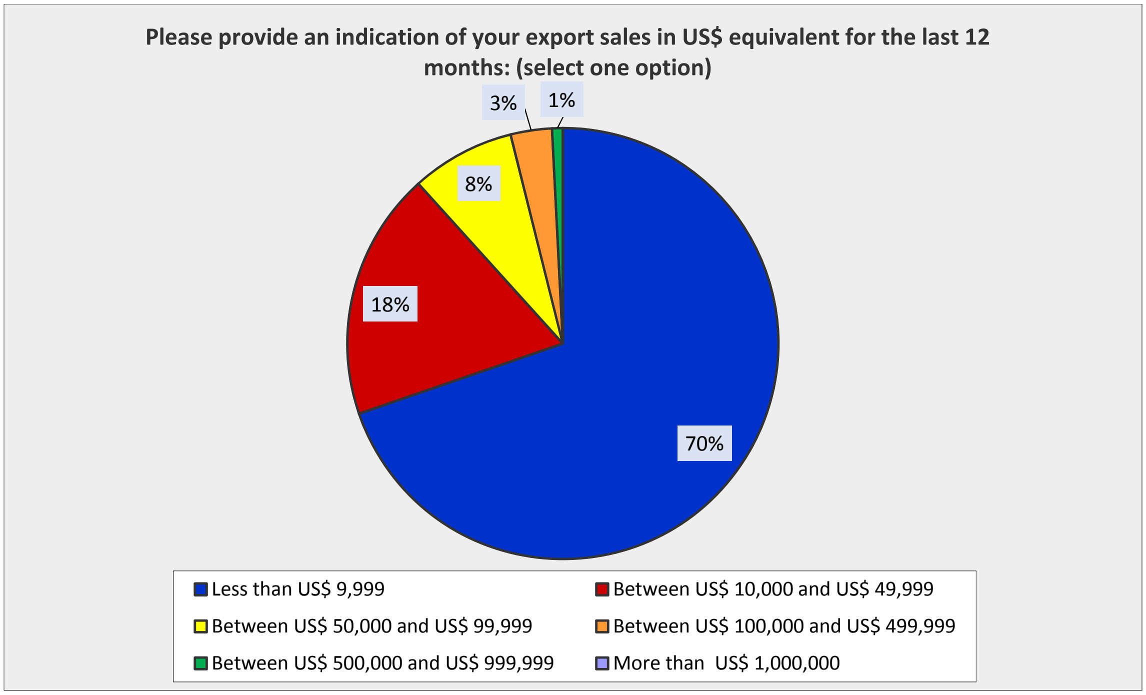
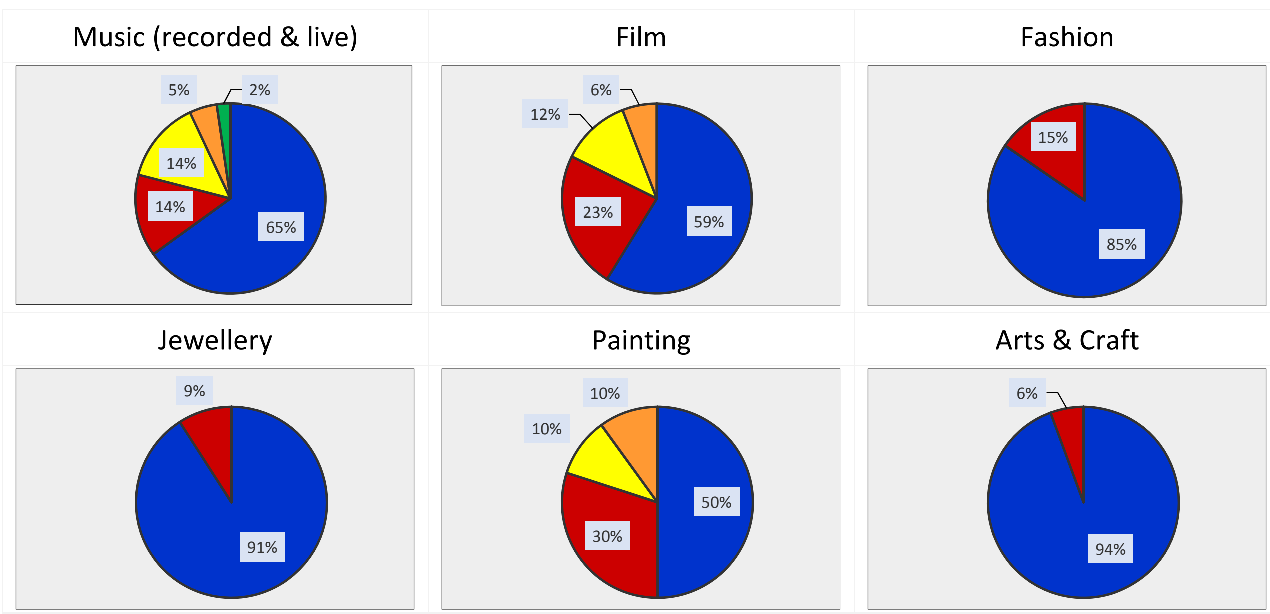


Figure 4b: Comparison of total and export sales for CARIFORUM CIs respondents

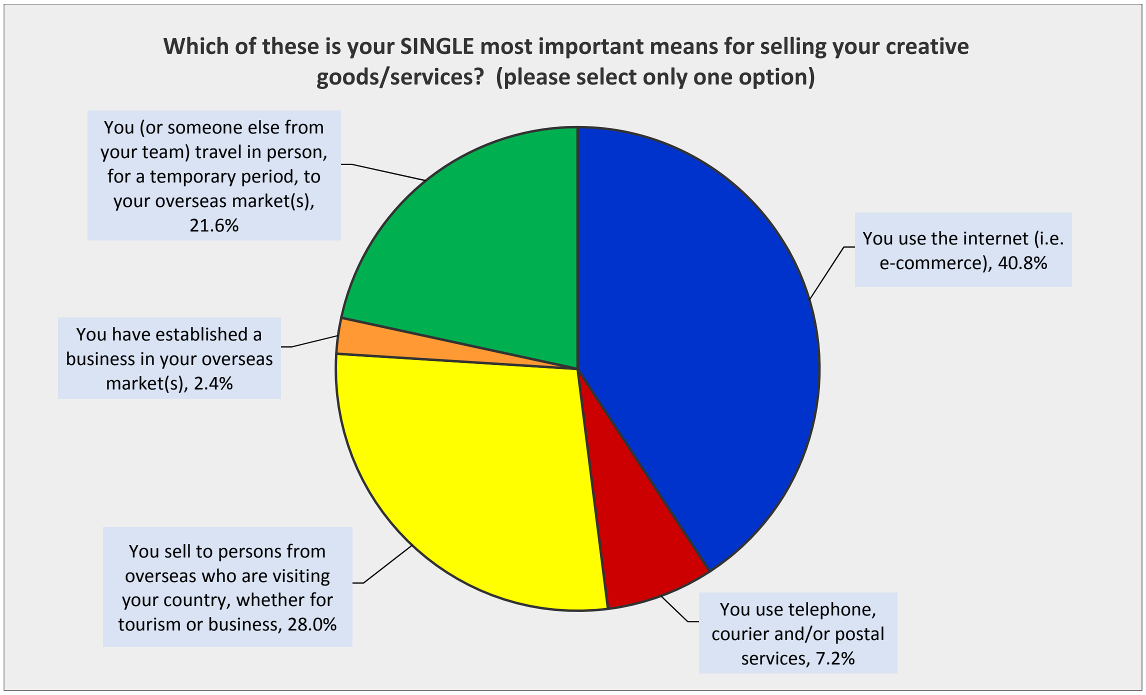


Industry-specific variation:

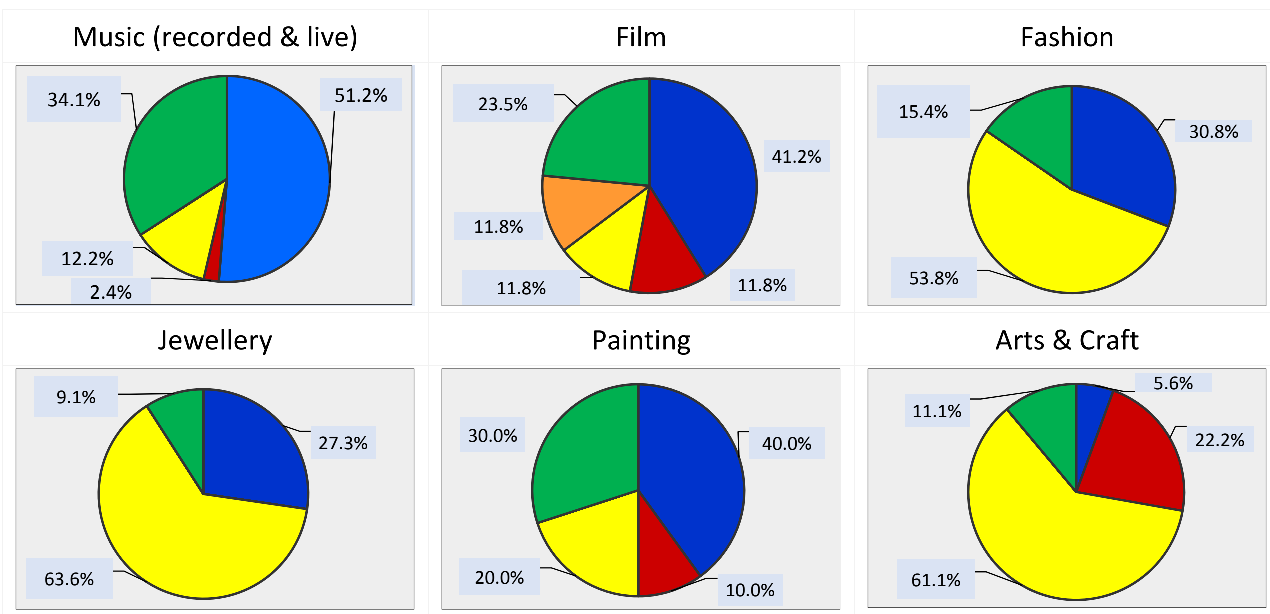


- Almost 63% do not have an Export Strategy for their business, the other 37% do.
- Overall, 40% of respondents are currently exporting; and they use all export modalities to deliver/sell their creative goods/services, promote and otherwise transact business. The following Figure 5 indicates the relative use of the five export modes considered most important by CARIFORUM's CIs professionals to sell their goods/services. The industry-specific variation is also shown.

Figure 5: Most important export modes for CARIFORUM CIs professionals



Industry-specific variation:



- Specific to their e-commerce activities, respondents listed the following as online platforms/services they employ:
    - Email, websites (with dedicated with e-commerce links), blogspot sites.
    - Social media: overall, there is widespread use - in particular, Facebook (75% of respondents), Twitter (23%), and LinkedIn (20%). Also used, but to a lesser extent, is Instagram.
    - Online stores, platforms and services – these vary across CIs, with the widest

range used by Music professionals.

As one Music respondent commented, "in person communication is crucial for closing the deal, but internet/social media is the most important for capturing clients."

- Export destinations for those who export: (countries listed in decreasing order of popularity)
    - Overall, **41% do so to another country <u>in CARIFORUM</u>**; with Trinidad & Tobago being the most popular, followed by Barbados and then St. Lucia. There are also differing exports to all the other countries in the region.

      Industry-specific variation (countries listed in decreasing order of popularity):

        - » Music (recorded & live) – More than 55% do so to another country in CARIFORUM; with Trinidad & Tobago being the most popular, followed by St. Vincent & the Grenadines and St. Lucia.
        - » Film - 35% do so to another country in CARIFORUM; with Trinidad & Tobago being the most popular, followed by Barbados, Dominica, Dominican Republic, Guyana and Jamaica in equal measure.
        - » Fashion – More than 45% do so to another country in CARIFORUM; with Barbados and Trinidad & Tobago being the most popular.
        - » Jewellery - 30% do so to another country in CARIFORUM; with Barbados being the most popular.
        - » Painting – 30% do so to another country in CARIFORUM; with Antigua & Barbuda being the most popular.
        - » Arts & Craft - Only 5% export so to another country in CARIFORUM - to Barbados.

    - Overall, **52% export to a country <u>in the EU</u>**; with France being the most popular market, followed by Germany, Spain and the UK in equal measure.

      Industry-specific variation (countries listed in decreasing order of popularity):

        - » Music (recorded & live) – > 55% export to a country in the EU, with the UK and France being the most popular markets, followed by Germany, and then Denmark and Sweden.
        - » Film – More than 50% export to a country in the EU, with the UK and France being the most popular markets, followed by Germany.
        - » Fashion – 25% export to a country in the EU, with France being the most popular market. There are also some exports to Germany.
        - » Jewellery - 30% export to a country in the EU, in particular France and Spain.
        - » Painting – 60% export to a country in the EU, with France and Spain being the most popular markets, followed by Germany and the UK.

» Arts & Craft - 56% export to a country in the EU, with France and Spain being most popular.

- Overall, **68% export <u>elsewhere in the world</u>**, with the US being the most popular market by far overall. This is followed by Canada, and then by countries in Latin and Central America.

  Industry-specific variation (countries listed in decreasing order of popularity):

  » Music (recorded & live) - 75% export elsewhere in the world, with the US being the most popular followed by Canada, and then by countries in Latin America.

  » Film – More than 80% export elsewhere in the world, with the US being the most popular followed by Canada.

  » Fashion – 50% export elsewhere in the world, with the US being the most popular. There are also some exports to countries in Latin America.

  » Jewellery - 35% export elsewhere in the world, with the US being the most popular followed by Canada.

  » Painting – 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.

  » Arts & Craft - 50% export elsewhere in the world, with the US being the most popular followed by countries in Latin and Central America, Africa and Asia.

The popularity of the individual countries for the export of CARIFORUM CIs is given in the bar charts in Figure 6a-c. The % refers to 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 6a: Prevalence of exports to CARIFORUM markets by CARIFORUM CIs professionals

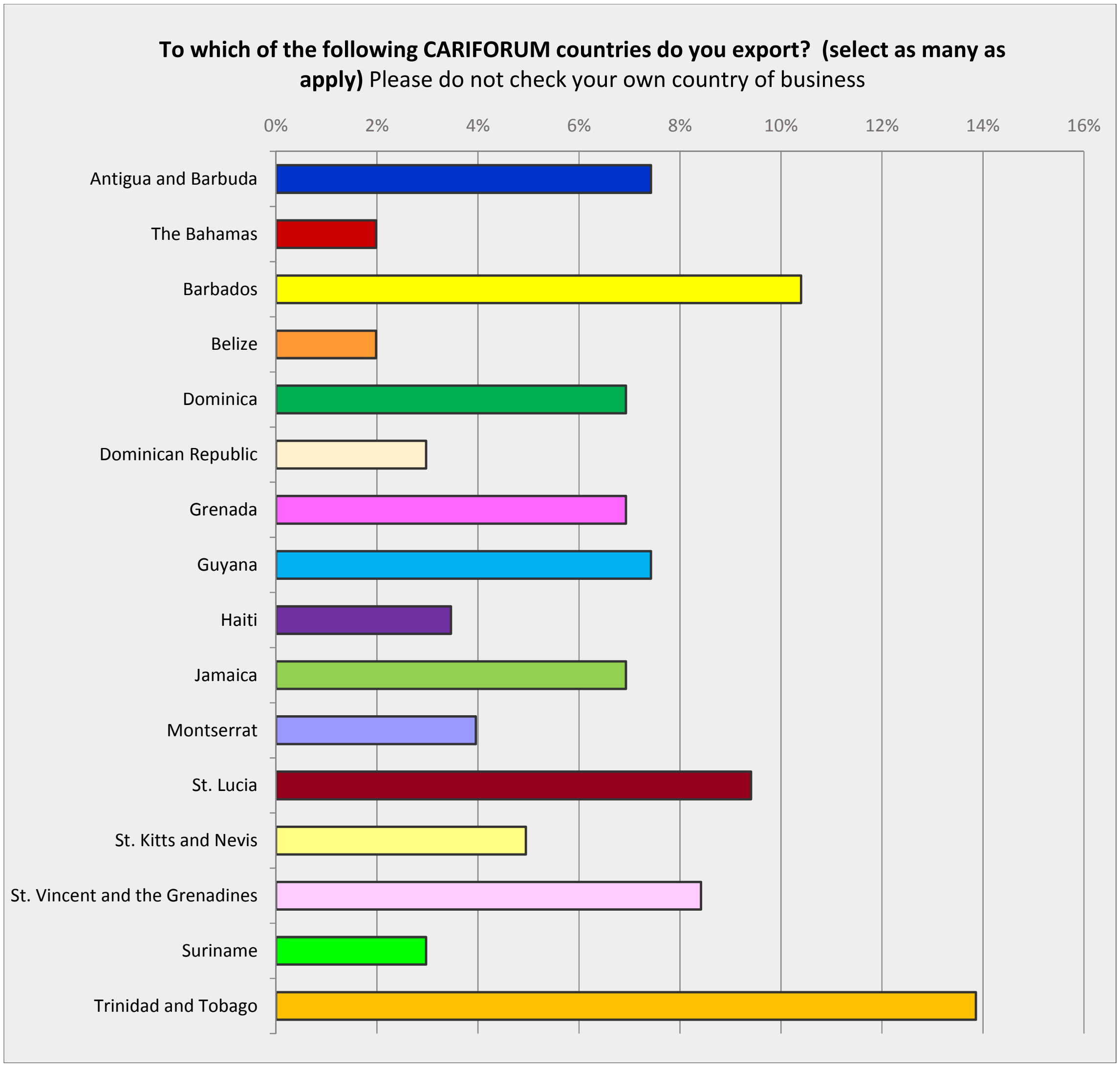


Figure 6b: Prevalence of exports to EU markets by CARIFORUM CIs professionals

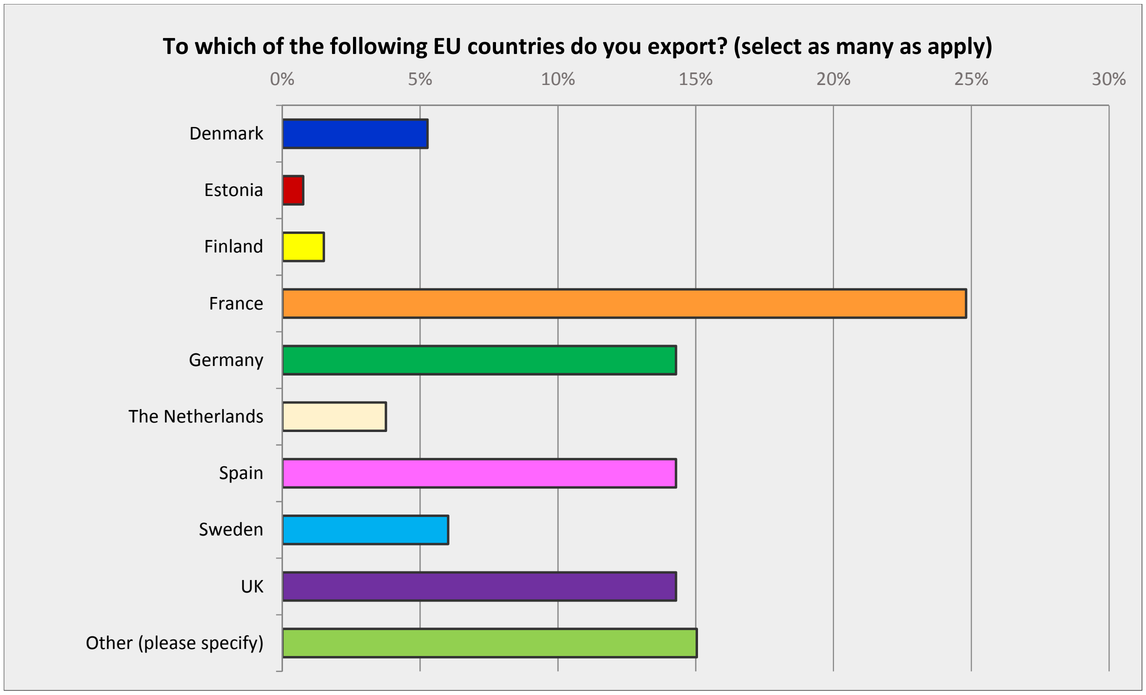
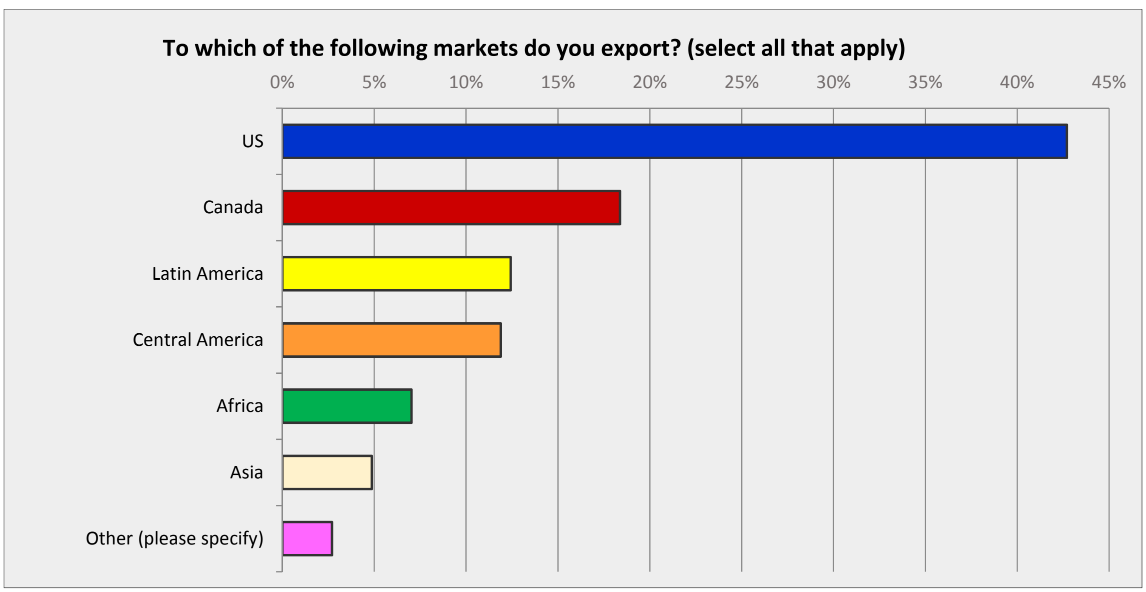


Figure 6c: Prevalence of exports to other markets by CARIFORUM CIs professionals

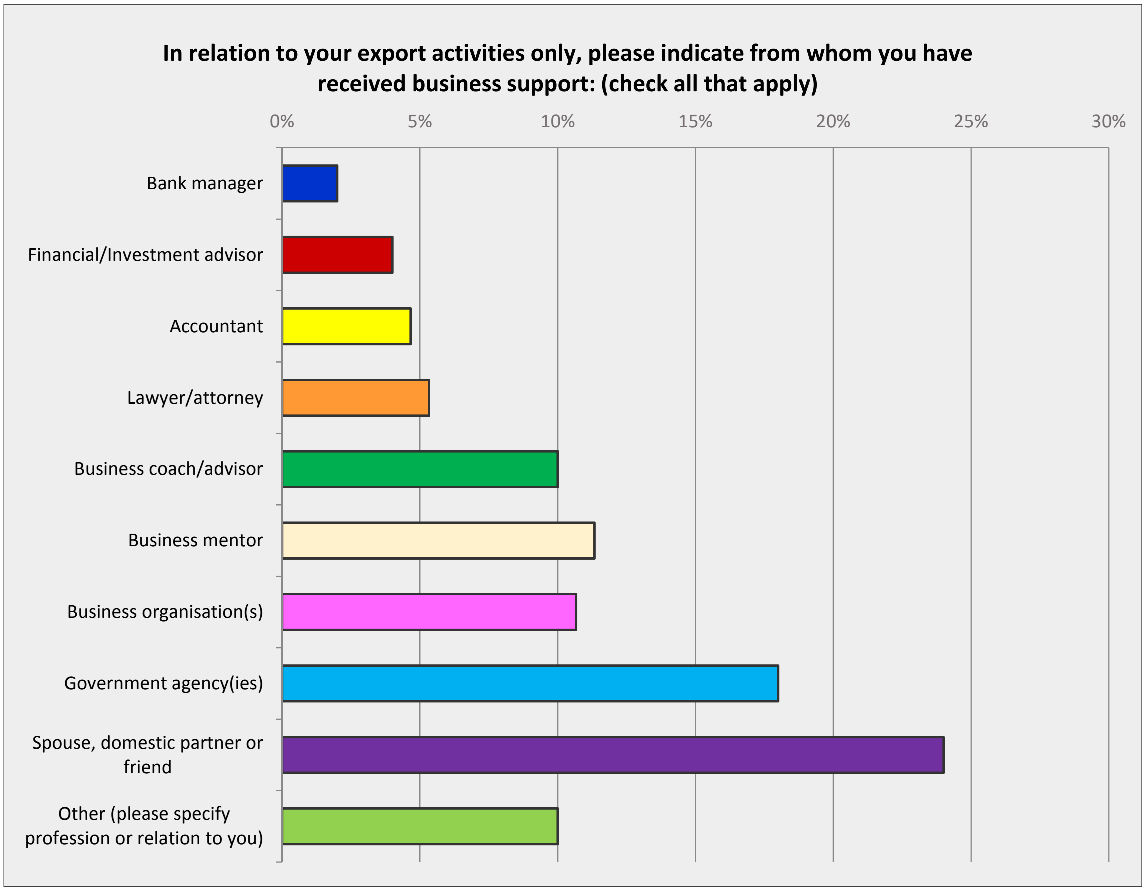


- Of the 60% respondents who are not currently exporting, the majority have never tried (64%); 23% 'tried but stopped'; and 13% 'tried without much (any) success'.
- Of note, almost 77% of respondents who are not currently exporting would be interested in starting (or resuming) their exports; 7% stated that they are not interested; the rest (15%) are not yet interested.

3.3.3 Export support framework for CARIFORUM CIs professionals

- The majority (76%) 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 a spouse/domestic partner or friend (24%), followed by government agencies (18%). This is indicated in Figure 7.

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



Industry-specific variation:

	% who do not receive support	Of those who do, most popular forms of support:
Music (recorded & live)	> 70%	Government agencies (44%); Spouse/domestic partner or friend (35%); Business organisation (30%)
Film	> 70%	Government agencies (28%); Spouse/domestic partner or friend (22%); Business coach/advisor, Business organisation (both 11%)
Fashion	> 70%	Spouse/domestic partner or friend (31%); Business mentor (22%); Business coach/advisor (16%)
Jewellery	> 80%	Spouse/domestic partner or friend; Accountant; Business organisation (all 18%)
Painting	> 90%	Accountant; Business organisation (all 18%)
Arts & Craft	> 80%	Spouse/domestic partner or friend (43%)

- 34% of CARIFORUM CIs respondents belong to a business organisation, whether local/national, regional or international. For most, this is an 'industry-specific association, network, alliance, or group'. Of lesser prevalence were the wide range of other organisations listed - including collective management organisations, chambers of commerce, and entrepreneurs/business owners' organisations.

  For most, this membership has boosted their export efforts through support including information (events, opportunities), training workshops and seminars, exposure/visibility, and networking opportunities. For some, this membership has also facilitated direct promotion/selling of their goods/services overseas, joint participation in trade events, and country branding.

  Of note is that in the DR, it is mandatory for all participants in the formalized film industry to belong to the National Film Commission (government).

4. Bottlenecks along the Value Chains of CARIFORUM CIs

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 CIs professionals

- Overall, almost 60% of CIs respondents have experienced challenge(s) to their creative exports, to greater or lesser extent. As indicated in the table below, the challenge considered most severe is 'Lack of access to financing for export activities'. This is followed, in equal measure, by 'Inadequate/inefficient enabling environment to support export (e.g. legislation, tax incentives, customs etc.)' and 'Lack of organisation of /in creative sector, with export promotion left to individuals'.

Table 2: Rating of export challenges by CARIFORUM CIs 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	29	55	71	23	2.27
Lack of access to technology or equipment required for export activities	47	35	66	30	2.13
Lack of market information (e.g. trends, regulations, consumers etc.)	22	47	91	18	2.43
Lack of information on trade fairs, festivals etc in export markets	23	39	99	17	2.47
Lack of networking or contacts	18	45	101	14	2.51
Unsure how to reach customers, suppliers, partners etc. overseas	24	52	89	13	2.39
Concerns wrt protecting your Intellectual Property in export markets	48	35	76	19	2.18
Lack of public support to attend trade fairs, festivals in export markets	22	41	101	14	2.48
Inadequate/inefficient enabling environment to support export (e.g. legislation, tax incentives, customs etc.)	21	38	107	12	2.52
Inadequate support services (e.g. shipping, insurance, packaging, supply of raw materials etc.)	35	41	81	21	2.29
Lack of organisation of /in creative sector, with export promotion left to individuals	13	47	107	11	2.56
Lack of access to financing for export activities	9	43	120	6	2.65

Poor treatment of creative enterprises by financial institutions	23	42	100	13	2.47
Poor treatment of creative enterprises by business organisations	20	52	91	15	2.44
Poor treatment of creative enterprises by government agencies	15	49	99	15	2.52
					No. respondents = 178

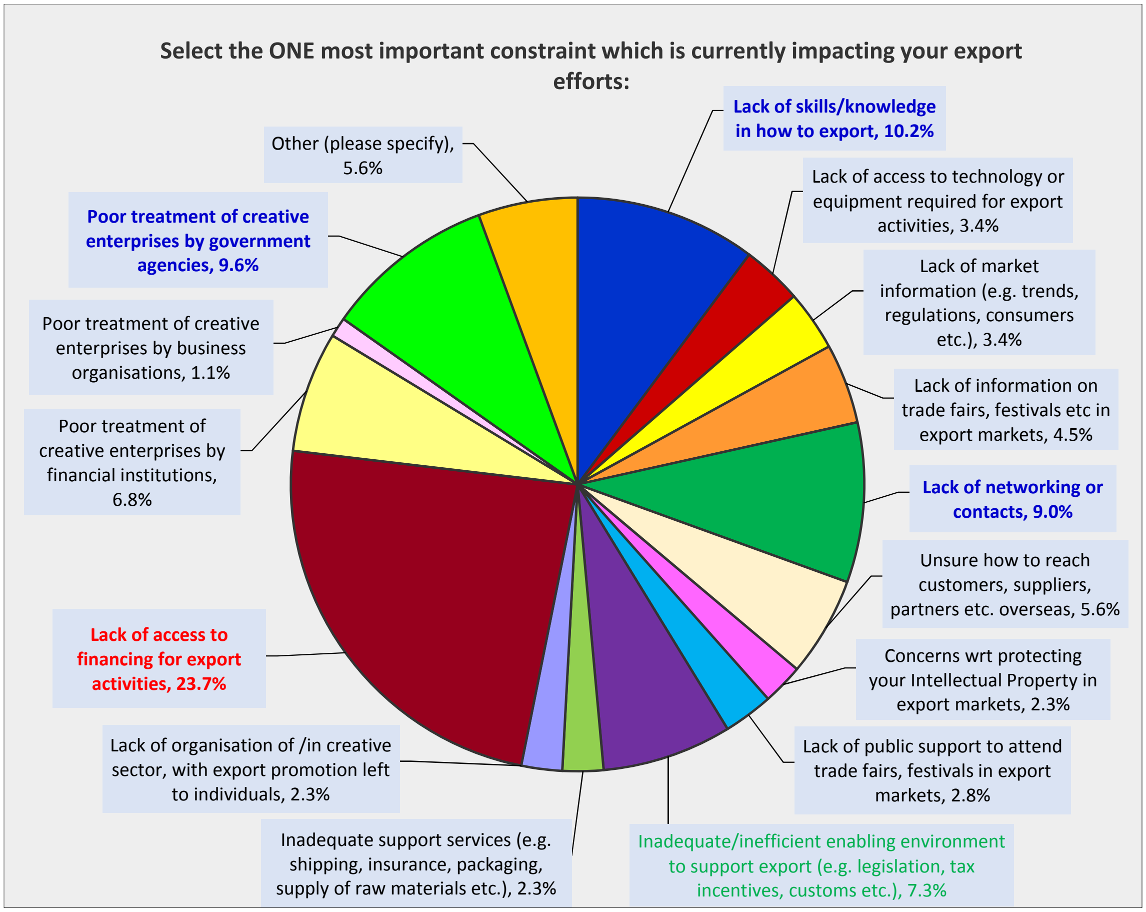
Industry-specific variation:

	% who do have experienced challenges	Challenges considered most severe
Music (recorded & live)	66%	Lack of access to financing for export activities
Film	56%	Lack of access to financing for export activities Inadequate/inefficient enabling environment to support export (e.g. legislation, tax incentives, customs etc.)
Fashion	45%	Lack of networking or contacts
Jewellery	60%	Lack of information on trade fairs, festivals etc in export markets Lack of public support to attend trade fairs, festivals in export markets Lack of access to financing for export activities
Painting	> 30%	Various challenges considered equally severe
Arts & Craft	55%	Lack of public support to attend trade fairs, festivals in export markets Lack of access to financing for export activities

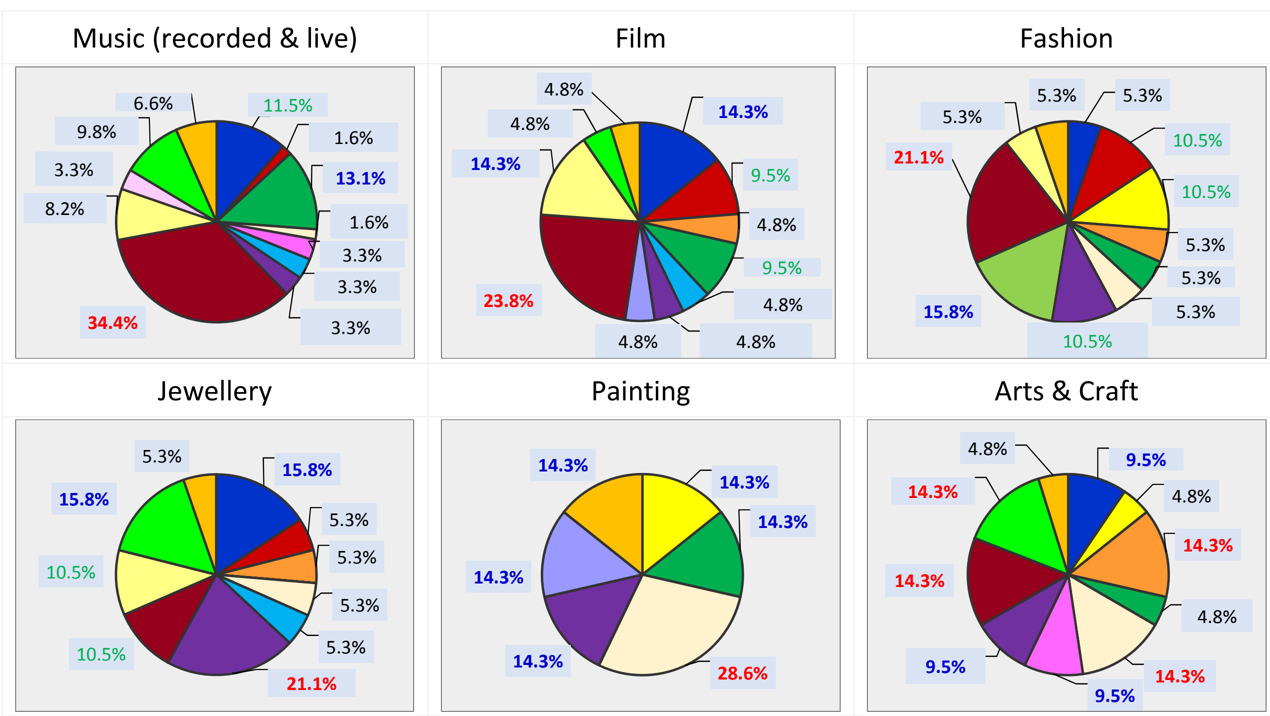
- As shown in Figure 8, the single most important export challenge facing CARIFORUM CIs professionals overall is 'Lack of financing for export activities" (noted by 24% of respondents). This is followed by 'Lack of skills/knowledge in how to export', 'Poor treatment of creative enterprises by government agencies' and 'Lack of networking or contacts' (each noted by 9-10% of respondents).

  The industry-specific variation in the topmost export constraints is also indicated below.

Figure 8: Most important export challenges facing CARIFORUM CIs professionals



Industry-specific variation:

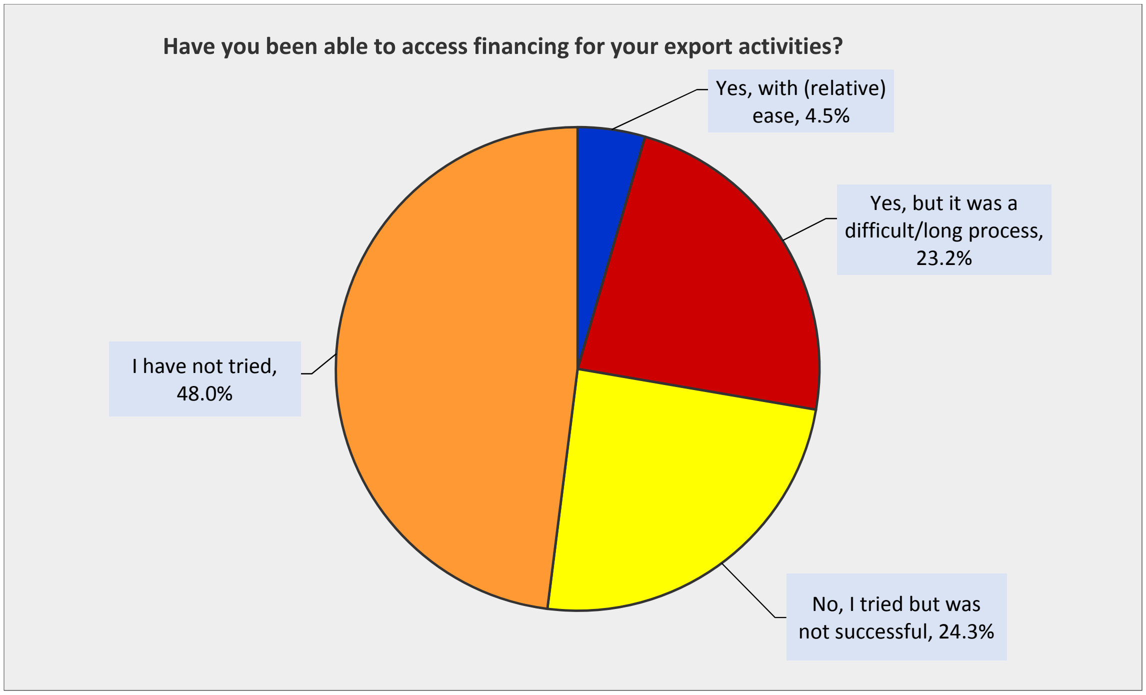


Industry-specific variation in the topmost constraints to export:

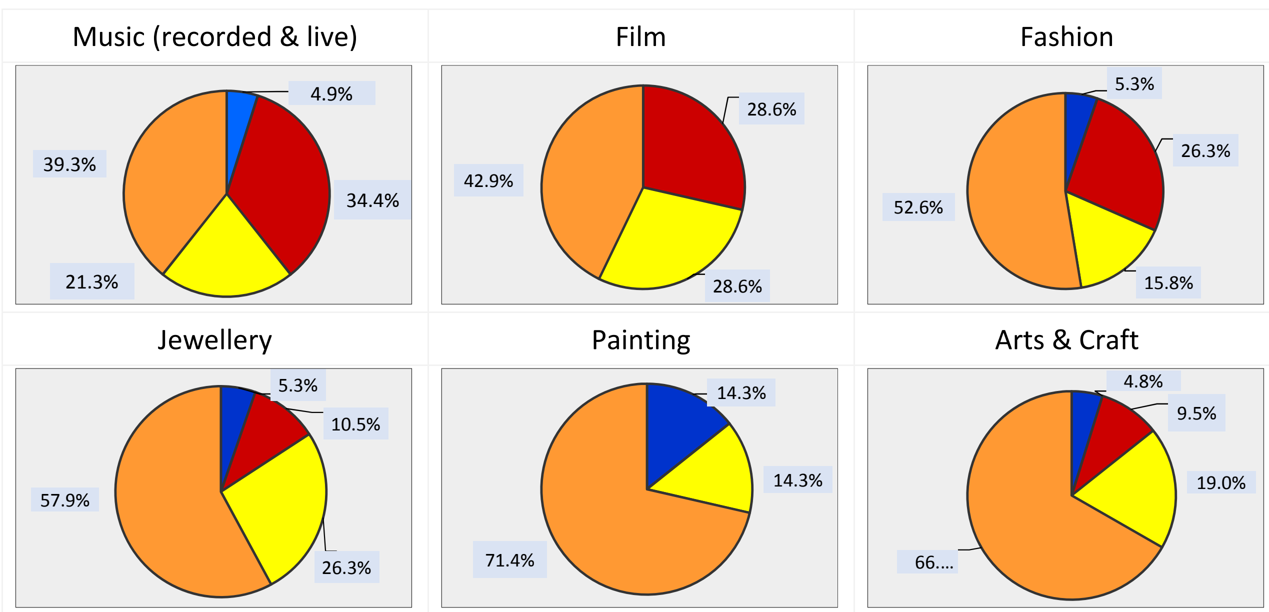
	Considered the most severe	Considered the 2nd most severe	Considered the next most severe
Music (recorded & live)	Lack of financing for export activities (34%)	Lack of networking or contacts (13%)	Lack of skills/knowledge in how to export (12%)
Film	Lack of financing for export activities (24%)	Lack of skills/knowledge in how to export, Poor treatment of creative enterprises by financial institutions (both 14%)	Lack of access to technology or equipment required for export activities, Lack of networking or contacts (both 10%)
Fashion	Lack of financing for export activities (21%)	Inadequate support services (e.g. shipping, insurance, packaging, supply of raw materials etc.) (16%)	Lack of access to technology or equipment required for export activities, Lack of market information (e.g. trends, regulations, consumers etc), Inadequate / inefficient enabling environment to support exports (e.g. legislation, tax incentives, customs etc.) (all 11%)
Jewellery	Inadequate/inefficient enabling environment to support export (e.g. legislation, tax incentives, customs etc.) (21%)	Lack of skills/knowledge in how to export, Poor treatment of creative enterprises by government agencies (16%)	Lack of financing for export activities, Poor treatment of creative enterprises by financial institutions (both 11%)
Painting	Unsure how to reach customers, suppliers, partners etc. overseas (30%)	Various other challenges in equal, but lesser, measure (each 14%)	
Arts & Craft	Lack of information on trade fairs, festivals etc in export markets, Unsure how to reach customers, suppliers, partners etc. overseas, Lack of financing for export activities, Poor treatment of creative enterprises by government agencies (each selected by 14%)		

- As relates to accessing financing for export, less than 5% of respondents overall have been successful, with (relative) ease as depicted in Figure 9. By contrast, 23% were successful but after a difficult/long process; 24% tried but were not successful; and 48% have not tried. The industry-specific variation is also indicated.

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



Industry-specific variation:



- Overall, the most important challenges in terms of export-related financing is 'Lack of suitable options available', followed by 'You were unable to meet the lender's security/collateral requirements'. The ratings of the various export financing challenges are presented in Table 3 below.

Table 3: Rating of export financing challenges by CARIFORUM CIs 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	6	35	2	2.85
You were unable to meet the lender's security/collateral requirements	3	5	26	9	2.68
Lender was not satisfied with the state/quality of your business documentation	6	9	12	16	2.22
Lender approved a loan but the amount was too low	4	4	14	21	2.45
Lender approved a loan but the term was too short	4	3	13	23	2.45
Lender approved a loan where the conditions were otherwise unacceptable	3	3	14	23	2.55
					No. respondents = 43

- 58% of respondents do not have to access to venture capital as an option to finance their business's export growth efforts, and 35% were unsure. [Only 14 respondents (8%) responded affirmatively to having access to venture capital]

4.2. Challenges within the EU for CARIFORUM CIs

These sections contain a summary only of the information and data contained in the industry-specific reports. As such, the authors recommend that the industry-specific VCA Reports be read for fuller details as well as the underpinning source/reference materials.

4.2.1 For CARIFORUM Music

The overall result of the EU survey were disappointing. More than 50 organisations were contacted, but their response rate was low and no real interest was shown to increase business cooperation. There is a general lack of knowledge at what the Caribbean music sector has to offer, who are the top selling artists (no official charts), what are the new music trends etc. A positive response was however received from MIDEM, the most important trade fair for music. They were interested in making inroads in the CARIFORUM countries.[7]

National trade association representing the major record labels[8] as well as the national trade

[7] Exchanges with Alex Mallett, sales representative of the Reedmidem

[8] Red Bullet, an independent record label and music publisher (NL).

associations taking care of the interest of the independent record labels[9] indicated that their company members were in general interested in expanding internationally. However at this moment the Caribbean music market was not one of their target markets.[10] They are currently more focused on entering the emerging markets such as China, Brazil, India and South Africa.

This was also the case for the publishers in Europe, who referred the question to their USA counterpart to investigate the interest of their members in collaborating with the Caribbean music sector.[11]

The Caribbean artists are, in general, often seen as local and not global and European record companies are less interested in investing in local music. The Caribbean, the consultants were told, has the image of being a region of a multiplicity of parochial music forms and with the exception of certain legacy acts (e.g. ska musicians or reggae artists with numbers that were first popularized two or three decades ago) the opportunities to do business in the "world music" scene are limited. Outside of the diaspora communities of the UK, small markets of die-hard fans exist for a few forms such as dancehall – but these are considered too insignificant for many in the industry to take much of an interest.

One key issue, these European stakeholders assert, is that the marketing efforts of the Caribbean music industry are not up to speed. They suggest that there is no structured approach to marketing music internationally - resulting in limited international mainstream airplay for Caribbean music. Also digital download/streaming opportunities in the CARIFORUM countries are relatively small. Finally a number of people feel that the local media is not focused on building local talent preferring to play international music and thus few 'home grown stories' are being created. The existence of 'stories' to support cultural exports (not only in reference to the music industry), they advise, is a crucial factor to succeed on the international market.

Thus, the combination of undeveloped local markets and low international exposure means that industry stakeholders in the EU are at best neutral regarding collaborating with local artists/producers, as they believe that their returns on investments will be low.

4.2.2 For CARIFORUM Film

The feedback from the 50 stakeholders along the value chain of the European film sector has shown that cooperation between the European and Caribbean film sector is still lacking and that there is room from improvement.

In particular, the representatives of the Black Filmmaker International Film Festival (BFM Media) showed a strong interest in developing business partnerships with the Caribbean film industry. Previously, the festival had selected films from Trinidad and Tobago, Barbados and Guyana.

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[9] UPFI (Union des producteurs phonographiques français indépendants), VUT (Verband unabhängiger Musikunternehmen) in Germany.

[10] BPI (British Phonographic Industry) (UK), IFPI Denmark, SNEP (Syndicat National de l'Edition Phonographique) (FR), BVMI (Bundesverbandmusikindustrie) (DE), PROMUSICAE (Productores de Musica de España) (ES).

[11] NMPA (National Music Publishers Association)

However the majority of European and national trade associations contacted were not aware of any film project being carried out by their members in one or more of the CARIFORUM countries. The low level of cooperation was in their view not caused by existing legal or technical barriers, but more due to the lack of trade opportunities. Only the UK and Italy had signed co-production agreements with Jamaica and Cuba (non-CARIFORUM) respectively. For the Danish Film Institute, the main impediment was the non-existence of cultural ties with the Caribbean region.

The COBO foundation in the Netherlands funds co-productions and runs a number of activities in Suriname, such as, training and film festivals. Dutch filmmakers can receive assistance if they wish to produce a documentary film. For historic reasons there is an interest of Dutch films professionals to operate in this Caribbean country. There is little interest in exploring the possibilities in the other countries as the main focus for COBO is currently financing co-productions with China. China is very eager to have more content in their cinemas.

4.2.3 For CARIFORUM Fashion

The overall result of the survey has shown that the Caribbean fashion sector is little known in the EU. There is more knowledge about the Latin American fashion sector.

There are however possibilities for cooperation in different areas, as Europeans are looking for new products and opportunities:

- Production – cooperation with factories in the CARIFORUM countries. In many European countries, such as for example Denmark, the production of the textiles and clothing is outsourced outside of the EU. Cooperation will strongly depend on the quality and price that the Caribbean factory can offer.
- Development of brands and new products.
- Training and schooling.
- Techniques for handling textiles.
- Language barrier – the fact that English, French and are the main language spoken in the Caribbean was seen as advantage to doing business, as this could facilitate the understanding between the business operators.

4.2.4 For CARIFORUM Jewellery

Exporters from CARIFORUM countries are advised by the CBI (based in The Netherlands) to focus on supplying the important (in terms of production and consumption) European markets such as France, Italy, Germany and the UK. There are opportunities to export costume and bridge jewellery to these countries, driven by consumer demand for more affordable jewellery. In Estonia and other Central and Eastern European countries, there is a growing demand for gold and silver jewellery. The CBI warned against the declining jewellery market in Spain due to their economic crisis.

Caribbean operators in the jewellery sector interested in entering the European market should take the following actions according to the CBI:

Consumption:

- Target leading consuming markets in Europe both directly and indirectly (for example through wholesalers in the UK and the Netherlands).
- Approach markets with value-for-money products (creative and modern designs for reasonable prices).
- Understand the target consumer: 1) be up to date on the latest design trends globally and in Europe: 2) research the buyers' taste.[12] Offer appealing jewellery in terms of design. Try to integrate ethnical elements to attract European consumers with ethnic taste.

Production:

- Target the leading producing countries such as Italy, France and Germany to offer jewellery elements, beads and stones.
- Cooperate with retailers that have their own collections, small unbranded jewellers, and independent artisans.
- Understand the production focus in terms of design and taste of each European country.

Importation:

- Target countries with solid-in-country demand for jewellery such as France, the UK and Germany.
- Approach Europe with a competitive price offering.

4.2.5 For CARIFORUM Painting

Nothing of particular note was found for this report.

4.2.6 For CARIFORUM Arts & Craft

The results of the survey showed that most stakeholders lacked awareness of the arts & crafts sector of the Caribbean region. However, they are interested in receiving more information on opportunities to do business. Many stressed that it was crucial for the Caribbean arts & crafts to be more visible and better promoted at trade fairs.

It should also be mentioned that the funding programmes for international projects of the EU Member States rarely specifically mention the Caribbean region (for example the Wales Art International programme). This again is due lack of knowledge on what is on offer in the region.

[12] Read more in the CBI Product Factsheets for Jewellery. See www.cbi.eu

5. Recommendations to Enhance Exports of CARIFORUM Creative Industries

To complement the detailed picture that was emerging from the survey of CARIFORUM CI professionals, the consultants initiated contact with a very wide range of European stakeholders[13] with a view to: determining their knowledge of the CARIFORUM CIs; to investigate the potential demand from EU-based companies for Caribbean creative product; and to explore the development of business relations, including:

- Setting up joint ventures which would enable Caribbean creative products to enter the European market (e.g. signing up new artists, promotion and distribution of Caribbean content in niche markets);
- Development of new business models to deliver Caribbean creative output (e.g. through digital channels)
- Creation of innovate means to reach the European/global audience.
- Joining of European / international networks.
- Collaboration with organizers of live events and festivals to promote performances of Caribbean artists or the organisation of joint events or festivals in one or more Caribbean countries.

Looking in this way at both the supply (i.e. CARIFORUM) and demand (i.e. EU) sides of the CIs' value chains gave rise to a rich and comprehensive set of recommendations. These are presented in the following sections,

- Improving export support for CARIFORUM CIs professionals
- Learning from good practice in the EU Member States for exporting their own CIs
- Strengthening the image and reputation of the Caribbean CIs
- Establishing structural relations and networks
- Scope for business cooperation between the EU and CARIFORUM
- Expanding commercial activities.

5.1. Improving export support for CARIFORUM CIs professionals

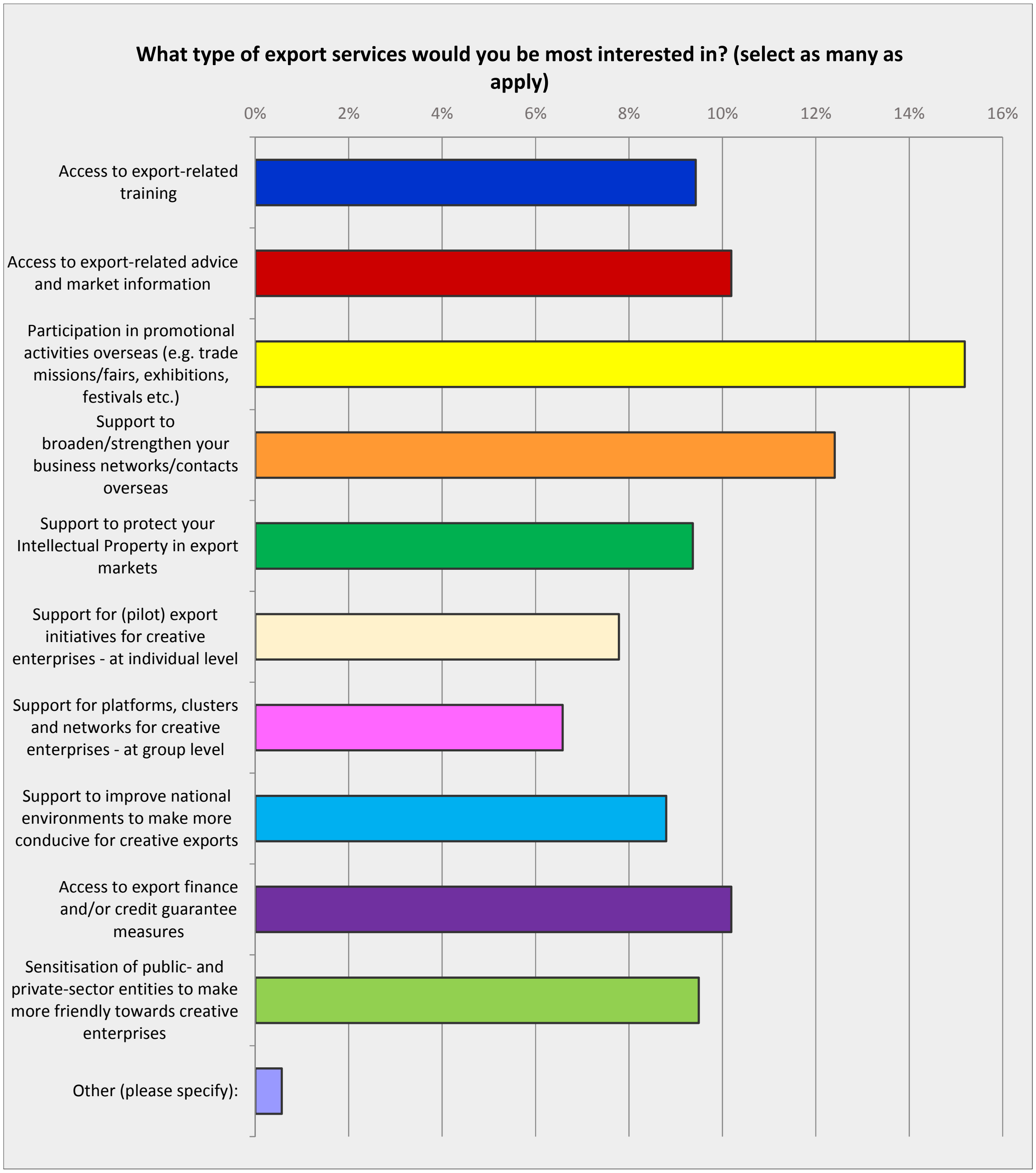
- As previously noted, almost 77% of respondents overall who are not currently exporting would be interested in starting (or resuming) their exports.
- Overall, 93% of respondents noted their interest in accessing support services to boost their creative exports. As illustrated in Figure 10, when given a selection of possible export-related services:
    - The most popular were: 'Participation in promotional activities overseas e.g. trade missions/fairs, exhibitions, festivals etc.' (selected by 15% of respondents) and 'Support to broaden/strengthen your business networks/contacts overseas' (12% of respondents).
    - These were followed by 'Access to export-related advice and market information', 'Access to export finance and/or credit guarantee measures', and

[13] The list of these is provide in the industry-specific reports, as an Annex.

‘Sensitisation of public- and private-sector entities to make more friendly towards creative enterprises’ (each selected by 10% of respondents).

The industry-specific variation is also indicated below.

Figure 10: Prioritisation of export services by CARIFORUM CIs professionals

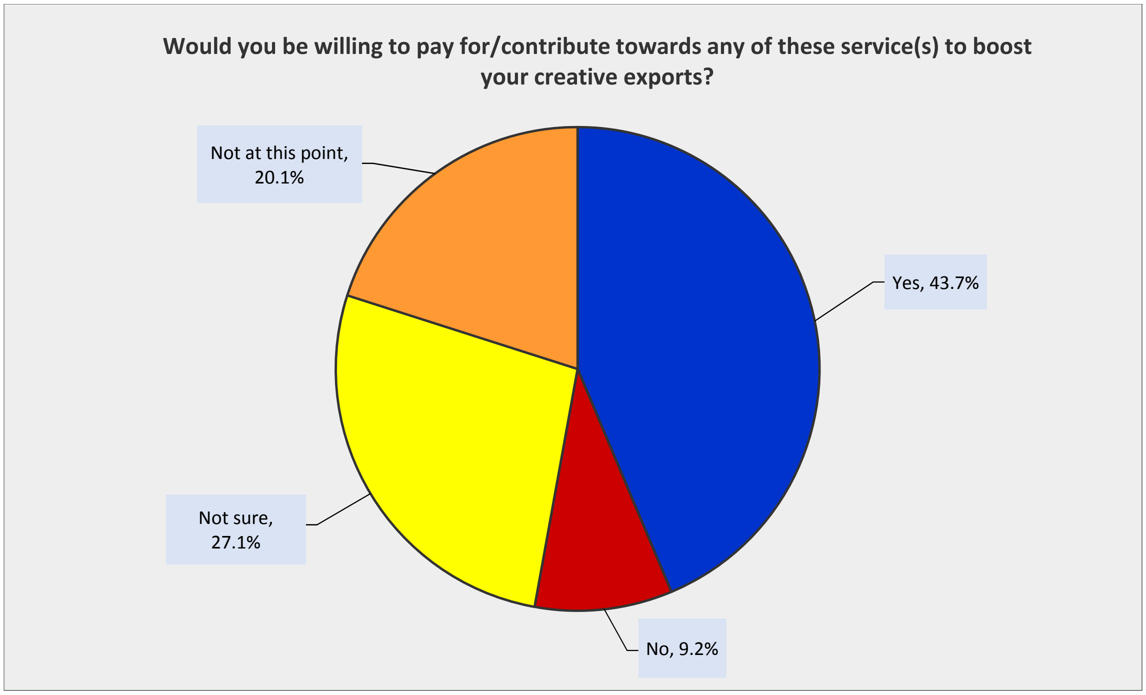


Industry-specific variation in the export services considered to be most interesting:

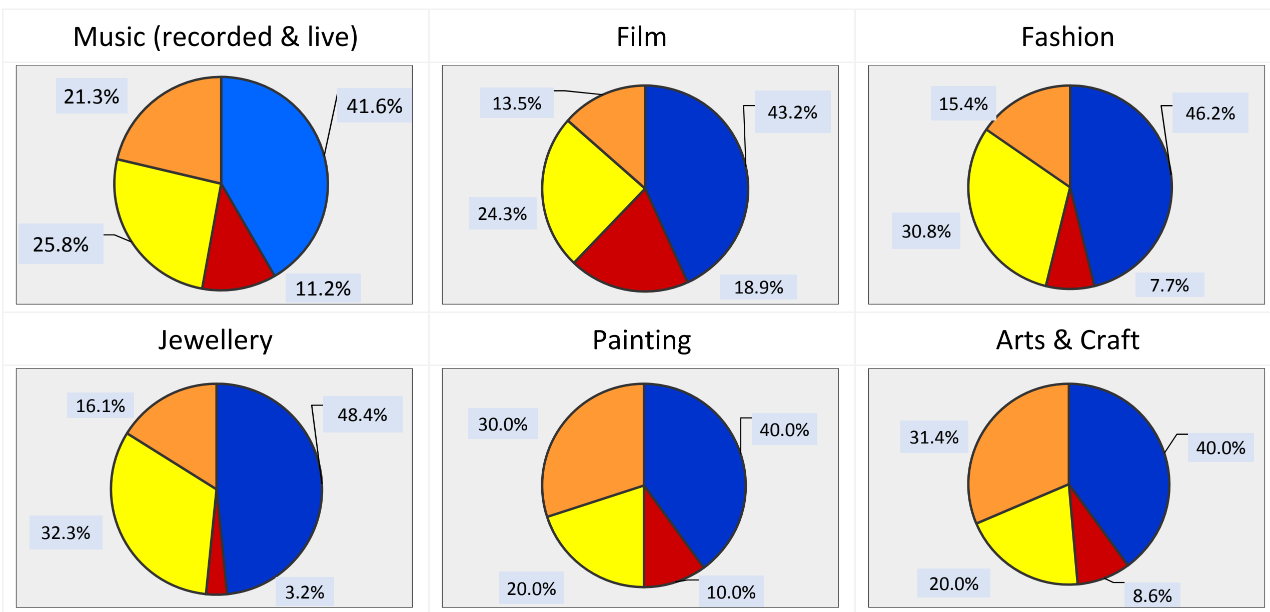
	Of greatest interest	2nd most interesting	Next most interesting
Music (recorded & live)	Participation in promotional activities overseas e.g. trade missions/fairs, exhibitions, festivals etc. (15%)	Support to broaden/ strengthen your business networks/contacts overseas (13%)	Access to export finance and/or credit guarantee measures (12%)
Film	Participation in promotional activities overseas e.g. trade missions/fairs, exhibitions, festivals etc. (14%)	Support to broaden/ strengthen your business networks/contacts overseas (13%)	Access to export finance and/or credit guarantee measures, Access to export-related advice and market information (both 10%)
Fashion	Participation in promotional activities overseas e.g. trade missions/fairs, exhibitions, festivals etc. (17%)	Support to broaden/ strengthen your business networks/contacts overseas (14%)	Access to export-related advice and market information, Access to export-related training (both 10%)
Jewellery	Participation in promotional activities overseas e.g. trade missions/fairs, exhibitions, festivals etc. (15%)	Sensitisation of public- and private-sector entities to make more friendly towards creative enterprises (13%)	Support to broaden/ strengthen your business networks/contacts overseas (11%)
Painting	Participation in promotional activities overseas e.g. trade missions/fairs, exhibitions, festivals etc. (20%)	Support to protect your Intellectual Property in export markets (13%)	Sensitisation of public- and private-sector entities to make more friendly towards creative enterprises (10%)
Arts & Craft	Participation in promotional activities overseas e.g. trade missions/fairs, exhibitions, festivals etc. (16%)	Support to broaden/ strengthen your business networks/contacts overseas (11%)	Access to export-related training, Access to export-related advice and market information, Access to export finance and/or credit guarantee measures (all just under 11%)

- As shown in the following Figure 11, 44% stated that they would be willing to pay for/contribute towards such services at this point in time. The industry-specific variation is also indicated.

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

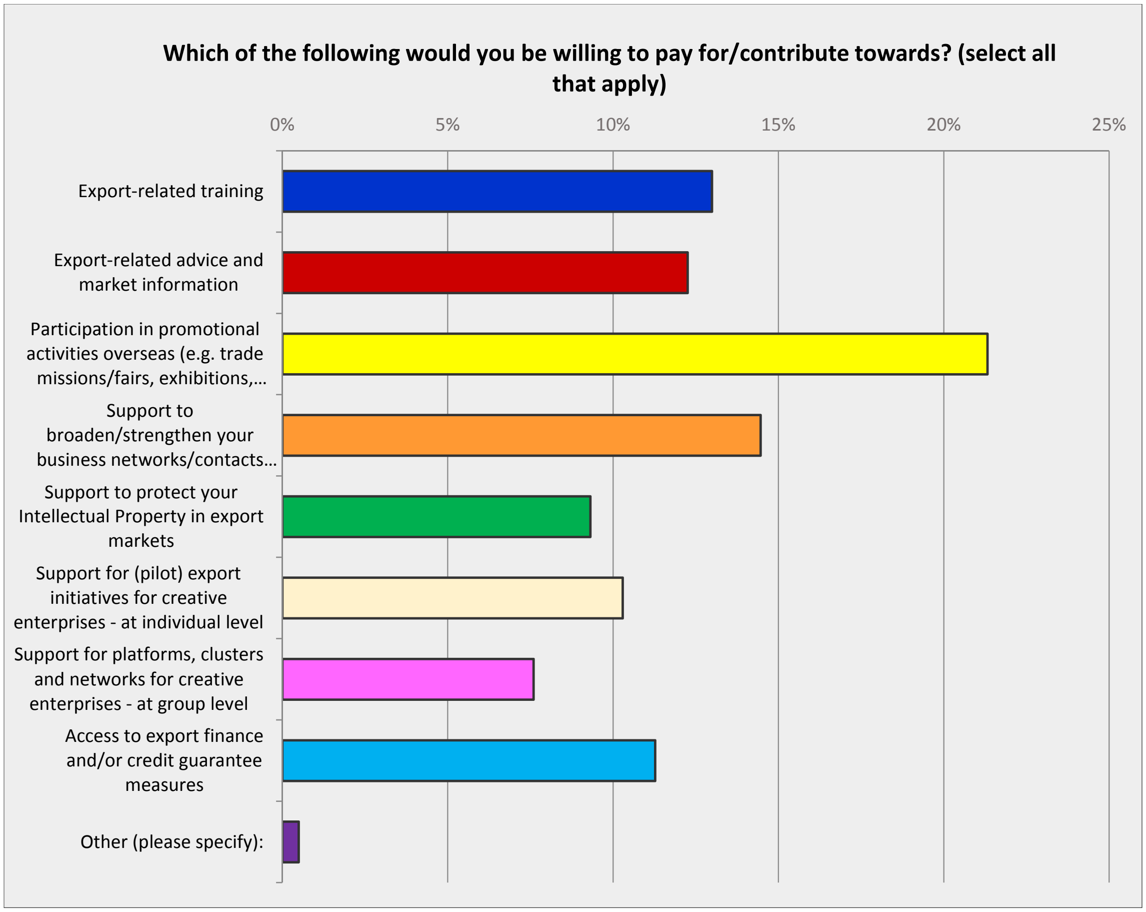


Industry-specific variation:

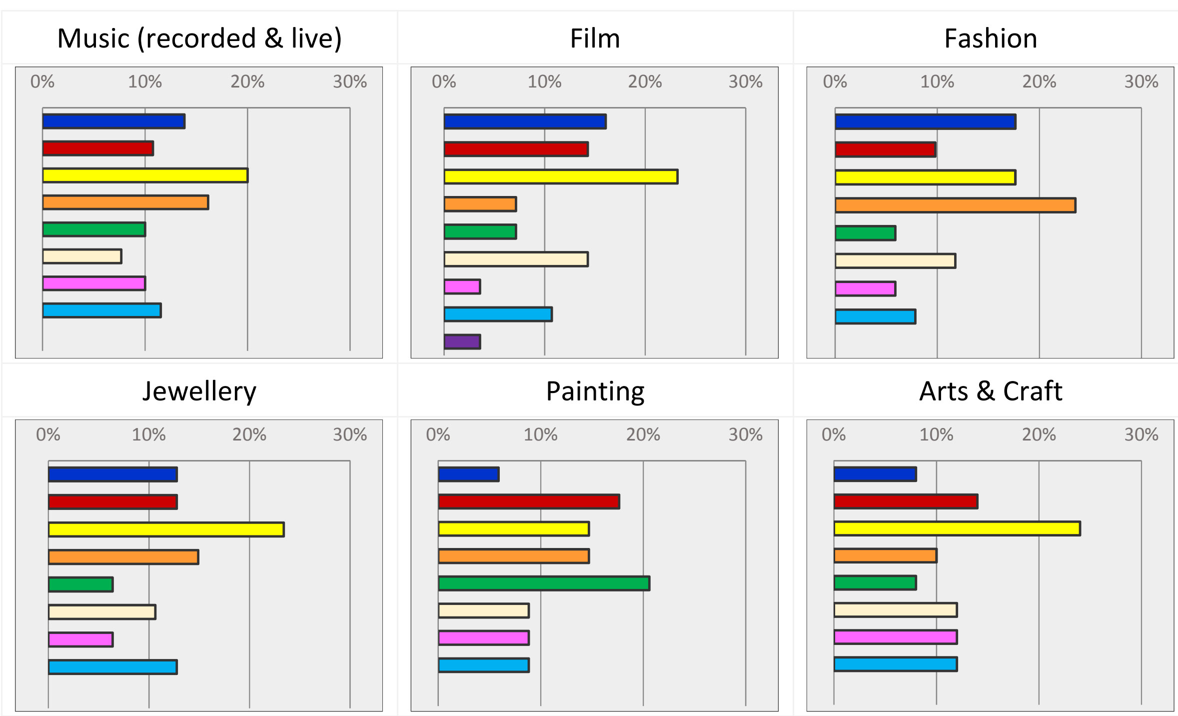


- Of these export-related services, most of the respondents indicated that they would be willing to pay for/contribute towards 'Participation in promotional activities overseas e.g. trade missions/fairs, exhibitions, festivals etc.' (21%) and 'Support to broaden/strengthen your business networks/contacts overseas' (15%). Additionally, 11-12% of respondents indicated that they would be willing to pay for/contribute towards 'Export-related training' and 'Export-related advice and market information'. This prioritisation is indicated in Figure 12 below.

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



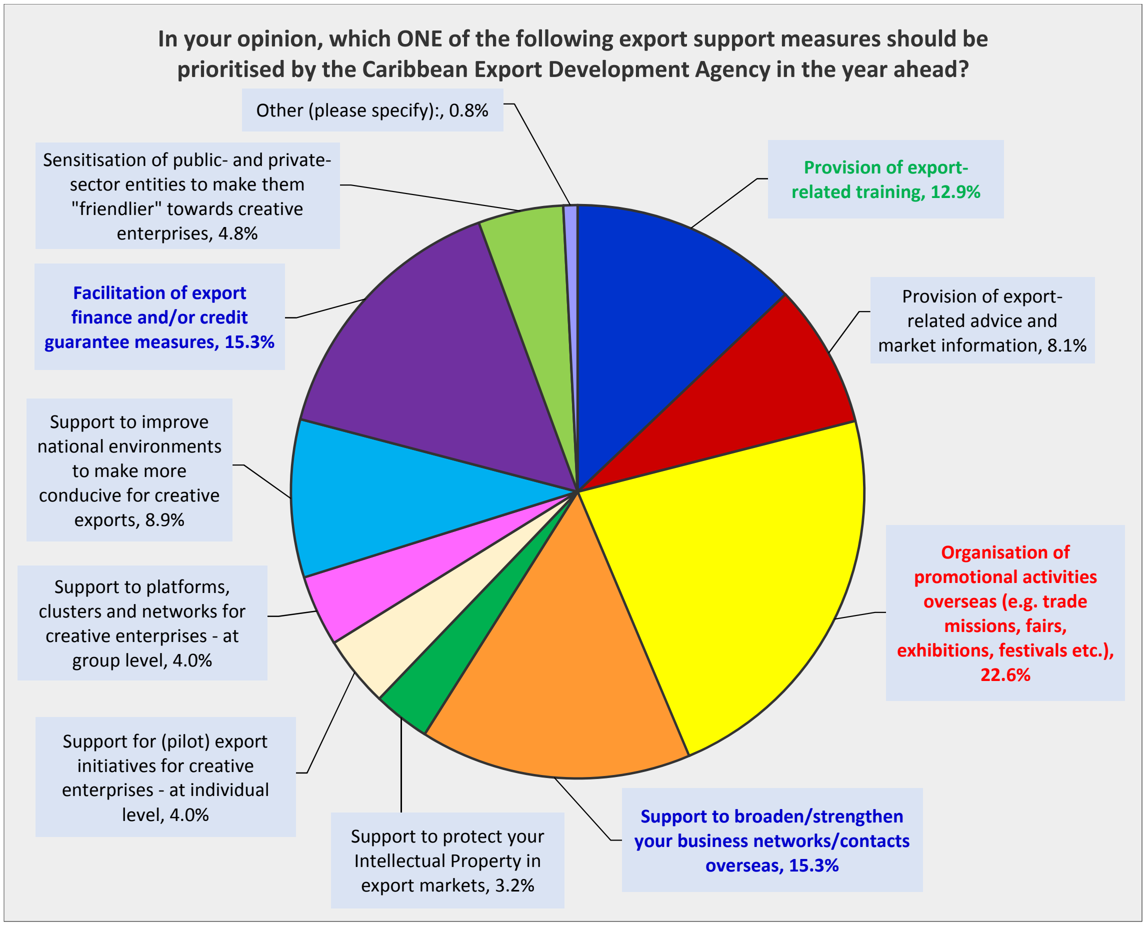
Industry-specific variation:



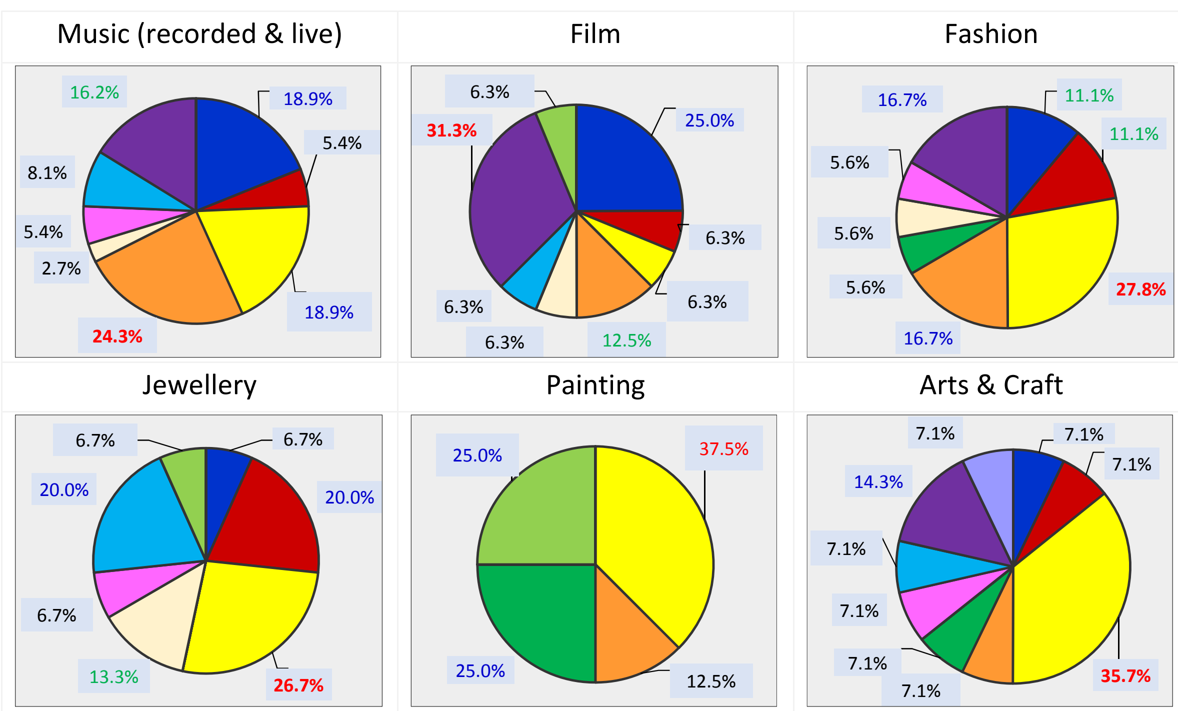
- When asked whether they reserve a budget to support their exports, 7% responded affirmatively (for the most part, the amounts were not given although 2 persons indicated US$ 5000-6000 as their budget and 1 person indicated US$ 10,000). 44% of respondents have no export budget; and the remainder (49%) responded "not yet".
- As illustrated in the following Figure 13, when asked which export-related service(s) should be prioritised by Caribbean Export:
    - The most popular was 'Organisation of promotional activities overseas (e.g. trade missions, fairs, exhibitions, festivals etc.)' (selected by 23% of respondents).
    - This was followed by: 'Support to broaden/strengthen your business networks/contacts overseas' and 'Facilitation of export finance and/or credit guarantee measures' (each selected by 15% of respondents).
    - These was followed by: 'Provision of export-related training' (selected by 13% of respondents).

  The industry-specific variation in the export-related services to be prioritised by Caribbean Export is also presented below.

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



Industry-specific variation:



Industry-specific variation in the export services which should be prioritised by Caribbean Export in the year ahead:

	Topmost priority	2nd priority	3rd priority
Music (recorded & live)	Support to broaden/ strengthen your business networks/contacts overseas (25%)	Provision of export-related training, Organisation of promotional activities overseas (e.g. trade missions, fairs, exhibitions, festivals etc.) (both 19%)	Facilitation of export finance and/or credit guarantee measures (16%)
Film	Facilitation of export finance and/or credit guarantee measures (>30%)	Provision of export-related training' (25%)	Support to broaden/ strengthen your business networks/contacts overseas (13%)
Fashion	Organisation of promotional activities overseas (e.g. trade missions, fairs, exhibitions, festivals etc.) (30%)	Support to broaden/ strengthen your business networks/contacts overseas, Facilitation of export finance and/or credit guarantee measures (both 17%)	Provision of export-related training, Provision of export-related advice and market information (11%)
Jewellery	Organisation of promotional activities overseas (e.g. trade missions, fairs, exhibitions, festivals etc.) (27%)	Provision of export-related advice and market information, Support to improve national environments to make more conducive for creative exports (both 20%)	Support for (pilot) export initiatives for creative enterprises – at individual level (13%)
Painting	Organisation of promotional activities overseas (e.g. trade missions, fairs, exhibitions, festivals etc.) (38%)	Support to protect your Intellectual Property in export markets, Sensitisation of public- and private-sector entities to make them "friendlier" towards creative enterprises (both 25%)	Support to broaden/ strengthen your business networks/contacts overseas (13%)
Arts & Craft	Organisation of promotional activities overseas (e.g. trade missions, fairs, exhibitions, festivals etc.) (36%)	Facilitation of export finance and/or credit guarantee measures (14%)	Various export services (7%)

5.2. Learning from good practice in the EU Member States for exporting CIs

5.2.1 For EU Music

The EU's recognition of the economic importance of the cultural and creative industries has led to the establishment, across many of its member states, of sector & industry-specific institutions – including music export offices - to support the internationalisation of the sector. For example, NOMEX Music Export Programme is a collaborative organisation for the Nordic Music Export offices in Finland, Sweden, Norway, Denmark and Iceland for international promotion. France has established bureauexport – the music export bureau for the French music industry, with its headquarters in Paris operates through a global network with offices in Berlin, London, New York, Tokyo and Sao Paulo. Many other member states have either established - or are now piloting – comparable initiatives.

NOMEX - the Nordic Music Export Programme (www.nordicmusicexport.com) - brings together the five music export offices of the listed Nordic states with the objective of facilitating the growth and development of the Nordic music sector. It focuses on expanding networks and increasing audiences outside each member country's home market. NOMEX tools include among others the Nordic Playlist (http://nordicplaylist.com) and the Nordic Travel Pass. The Nordic Playlist was launched in 2014 and is a platform to promote Nordic music to the Nordic as well as the international public. It provides easy access to music that is popular in the Nordic region at any given time. It aims to establish and grow the Nordic music brand and image and increase its consumption worldwide. The Nordic Travel Pass helps up-and-coming artists to develop their careers across borders by providing information on opportunities in Nordic countries, discount schemes on travel and access to practical information.

Apart from NOMEX, the Finnish Ministry of Education and Culture also operates four support schemes for the entire culture and creative sector, which are based on open calls for projects. These schemes also include support for artists to tour in markets where they have released a record. The Ministry for Employment and Economy supports CCI exports by providing grants to participate in trade fairs. This ministry also finances a cluster programme for the CCIs to support companies in realising their international ambitions. It is called Luovimo and coordinated by Finpro, the Finnish trade promotion organisation. Participating companies of the CCS have to pay a fee and get low barrier access to public financing. Luovimo offers music companies a shared learning programme (workshops on sales pitches, business models canvases, intellectual property rights and international negotiations, branding, social media, crowd funding etc.) and company specific consulting (planning international growth, internationalisation plan, testing products and services in desired markets, choosing the right market to enter, etc.).

The Welsh government provides support for CCS to develop and exploit commercial export opportunities in international markets. Their trade and export assistance is aimed at being market-led and responsive. This allows companies to take advantage of opportunities as they arise. For example the government worked with partners of the music sector to attract the WOMEX festival to Cardiff in October 2013. Support is subject to the approval of a business case.

In Germany, the Federal Ministry of Economics and the Federal government commissioner for Culture and the Media have pilot projects for the music sector. These projects focus on their priority regions such as China ("Germany and China together in motion") during the Expo in Shanghai and the USA ("Presentations of Germany at South by Southwest") - SXSW- in Austin, Texas. It promotes guest performances of German ensembles and the Goethe Institute helps the artists pay their travel expenses.

5.2.2 For EU Film

Each of the selected nine EU Member States has a film institute that, among other things, funds the production and distribution of films made by firms domiciled in these countries.

For instance, in France the government set up uniFrance Film, which gathers more than 900 French industry professionals (producers, talents, sales agents etc.). The main goal of uniFrance is promote the distribution of French films abroad. To do this, it carries out the following activities:

- Film marketing:

  - Organizes the biggest French cinema market in Paris every year: Rendezvous with French Cinema;
  - Showcases French cinema through engagement in some of the most important international film centres (Cannes, Berlin, Toronto, Los Angeles, Hong Kong); and
  - Provides direct support to film distributors in target countries to commercially release French films in their markets.

- Increasing awareness of French cinema among: the international press (e.g. through organizing regional press junkets with French film talent); international exhibitors (through participating in exhibitor conventions in 10 countries); and networking with buyers of film content for web and VOD.

- Organization of French film festivals:

  - In 10 strategic countries (including the USA, Germany, Italy, UK, Russia, Japan, China);
  - Online worldwide (www.myFrenchFilmFestival.com);
  - Providing active support for French films at 60 international festivals (including Cannes, Berlin, Locarno, San Sebastian and Pusan).

- Master classes: Organizing master class with French directors in film schools and international universities abroad.

- Subtitling: Promoting and subtitling French short films for film festivals, markets and online festivals.

While the services provided by unifrance Film are more extensive than in most of the other selected EU member states – given the international reputation of France as one of the world's main film centres – many of the other countries are adopting some of the same strategies.

The landscape also includes a significant number of EU-wide mechanisms for disseminating information on European films and co-productions featuring EU partners. One such avenue is Cineuropa (http://cineuropa.org/p.aspx?t=index&lang=en) which is described as “the first European portal dedicated to cinema and audiovisual in 4 languages. With daily news, interviews, data bases, in-depth investigations into the audiovisual industry, Cineuropa aims at promoting the European film industry throughout the world”.

Similarly, Europa Cinemas, founded in 1992 with funding from the MEDIA programme (Creative Europe) and from the Centre national du cinéma et de l'image animée (CNC), is a film theatre network focusing on European films. Its objective is to provide operational and financial support to cinemas that commit themselves to screen a significant number of European non-national films, to offer events and initiatives as well as promotional activities targeted at young audiences. In 2015, its network comprises 42 countries, 596 cities, 977 cinemas and 2,350 screens.

5.2.3 For EU Fashion

The Dansk Fashion and Textile is industry association representing more than 300 small and large fashion and textile companies that export around 60% of their textiles abroad and is interested in international cooperation. Some of their designer brands are: Bruuns Bazaar, Charlotte Sparre, Georg Jensen Damask, Stella Nova, Norse Projects, Won Hundred, Baum und Pferdgarten, hummel, Ferm Living, kvadrat and egetæpper.
The association has developed an international match-making service for professionals in the fashion industry called “Fashion Tour”. It is aimed at increasing the awareness of Danish fashion on the international stage and creating contacts among foreign agents, distributors and buyers. Since 1895, Dansk Fashion and Textile has been a fixed hub for all companies engaged in both the production and export of clothes and textiles on Danish, European and international markets. They have a specific person in the organisation dealing with export initiatives, international trade fairs, international buyers, agents and retail chains.

The association also has a creative director and consultant for design and trends. The director is responsible for promoting the interests of the fashion and textile industry to the Danish and international media, as well representing the organisation at the Copenhagen Fashion Week. This is Scandinavia’s biggest fashion week and it is held twice a year and attracts more than 40,000 international buyers, designers and journalists. Members also have access to a unique trend library with the latest books and materials from internationally renowned trend agencies such as PeclersParis, A+A and Carlin as well as a constantly updated electronic trend database – WGSN.

Dansk Fashion and Textile also works as a source of inspiration on Instagram, among other platforms, where they post about fashion, design, trends, clothes and lifestyle (follow on: DMOGT Trend).

5.2.4 For EU Jewellery

The Centre for the Promotion of Imports from developing countries (CBI) is part of the Netherlands Enterprise Agency and commissioned by the Ministry of Foreign Affairs of the Netherlands. It supports producers / exporters to get a foothold on the European market as well as organisation supporting export (capacity building). In the Caribbean region they only target Suriname.

The CBI assists among other producers/exporters of the jewellery sector by providing them market information. In addition they have a special "export programme" that approaches the value chain as a system in which all stakeholders are interconnected. To optimally improve export promotion CBI works on:

(1) Export Coaching: Their Export Coaching Programme helps exporters/producers to:

- Adapt their company and products to EU market requirements and standards;
- Become familiar with EU markets and business practice;
- Develop an export marketing strategy;
- Export to the EU market;
- Consolidate their export position in the EU.

The CBI carries out programmes in over 20 different sectors. Most programmes follow a step-by-step Modular approach. The ECP is tailor-made and consists of a selection of the following modules:

(2) Institutional Development: For organizations wishing to assist companies to export their goods and services, the CBI has developed the Business Service Organisation (BSO) Development Modules to:

- Improve or develop EU-specific services needed by their clients;
- Re-engineer related work processes and service delivery modes;
- Improve service delivery by enhancing staff competencies;
- Benefit from strategic cooperation with business service providers as well as other relevant stakeholders;
- Play a proactive role in the export value chains within which their BSO operates.

See more at:
http://www.cbi.eu/About%20CBI/CBI%20services/Training%20Programmes#sthash.sSltS4EM.dpuf

(3) Human Resource Development: The objective of Human Resource Development (HRD) interventions of the CBI is to create and develop (European) export related knowledge, skills and attitudes among representatives of SME clients and/or BSO staff. CBI offers a range of training courses on European export and European market related issues. These courses are complementary to the aforementioned ECP and BSOD programmes, but may also be provided to a larger group of (aspiring) exporters than the core group of companies participating in the ECPs. The courses can be organised in one of our target countries or in the EU.

In addition, CBI is currently developing online training courses. These online courses are accessible all over the world at any time of the day. This way CBI provides distant learning to its target group. This will increase the accessibility and flexibility of CBI training activities.

What do they offer?

Training Focus countries	· Creating knowledge, developing of skills and attitude · Aimed at SMEs and BSOs staff members · Two-day training (in general)
Training Europe	· Creating knowledge, developing of skills and attitude · Aimed at SMEs and BSOs staff members · Five-day training (in general)
Online Training	· Creating knowledge, developing of skills and attitude · Aimed at SMEs and BSOs staff members · Online training

Source: CBI

The training courses are clustered into five phases of the export process.

1. Preparing an organisation
2. Conducting market research
3. Creating strategy
4. Product development
5. Marketing and promotion

See more at:
http://www.cbi.eu/About%20CBI/CBI%20services/BSO%20Development%20programmes#sthash.vShjle9T.dpuf

5.2.5 For EU Painting

Nothing of particular note was found for this report.

5.2.6 For EU Arts & Craft

Nothing of particular note was found for this report.

5.3. Scope for business cooperation between EU & CARIFORUM for the CIs

5.3.1 For CARIFORUM Music

With respect to live musical performances, it is self-evident that CARIFORUM countries, with their tourism infrastructure, are ideally suited for the development and staging of festivals and similar events, and have a long track record of staging such. The culture of Caribbean festivals has gone on to influence other parts of the world with strong diaspora concentrations. T&T's Carnival is the parent of what has been described as Europe's largest street festival, the Notting Hill Carnival. That event, which has a source of income for some CARIFORUM performers over the years, was reported as having attracted some 1.5 million attendees in 2000 even though 2009 figures had been estimated at a much lower 720,000. In 2002, the London Development Agency estimated that the Carnival contributed some £93 million to the London and UK economy.

At the same time, it is important to caution that there may be less and less need for the presence of regional musical performers as virtually all European countries, for instance, have generated their own home-grown reggae/ska/soca performers and while there appears to be a significant market for "authentic" performers, the jury is out as to whether there is sufficient innovation taking place in the region, for audiences to demand performers from the region. Where performers from the region appear in EU markets, often the biggest draws are what are considered "nostalgia" acts back in CARIFORUM members states, with repertoires dating back to two, three or four decades. As the artistes responsible for those creations pass away, it is feared that there may be less and less interest in the current forms.

5.3.2 For CARIFORUM Film

Although the audio-visual industry has not been included in the EPA, there are opportunities to access the EU film and video market through its inclusion in the Protocol on Cultural Cooperation. This represents an area of preference for CARIFORUM countries given the sensitivities and the usual exclusion of the audio-visual sector from multilateral and bilateral agreements by the EU and other developed countries.

There is some scope for bilateral collaborations. Currently, Jamaica is the only CARIFORUM member state to have signed a film co-production treaty with an EU member state (the UK), theoretically incentivizing business and creative linkages between both countries. However, this has not, after several years of existence, been at all utilized, arguably because of the lack of competitive offerings (incentives etc.) for the film industry in Jamaica. The fact that the UK took the decision not to enter into any other co-production agreements in CARIFORUM, ironically, may also have denied Trinidad and Tobago – which has since established a fund for film production – and the Dominican Republic the opportunity to benefit from closer collaboration with the UK film industry.

The perennial problem of film financing presents a significant hurdle for the film industry in CAROFORUM, a problem exacerbated by the fact that the small size of domestic markets and the ready availability of relatively cheap foreign content via cable and the internet, means that the industry must focus on exports if it is to make any sustainable impact. A few CARIFORUM member states have asserted an interest in the film industry and many have reworked their tax regimes to include incentives benefitting film production, (as well as undertakings in other creative and cultural industries) but arguably their main focus has been on positioning themselves as film production locations for incoming film teams, rather than on stimulating their local and other creative and cultural industries. With the exception of Trinidad & Tobago (via the Trinidad & Tobago Film Company), and the Dominican Republic (through its Film Promotion Fund), most member states do not offer any type of seed financing of the type many in the film industry suggest is essential if a production-for-export industry is to grow.

A few film-makers from the Greater Antilles have been exploring the scope for collaborations with their counterparts in the French & Dutch Caribbean, and thus better positioning themselves to seek production finance from the support institutes in France & the Netherlands as well as direct market access to EU member states.

The model utilized in the French Caribbean territories is worth examining, even though it is acknowledged that as departments of France, productions originating in continental France and using the French Caribbean as a production location are effectively still taking place in France and thus are able to benefit from the same incentives. However, there is a distinct difference between the use of CARIFORUM countries as a one-shot production location (a fair number of internationally recognized films have been predominantly shot in the region) and using an individual member state as a production location for sustained shooting (e.g. as the backdrop for a TV series).

The latter has been eagerly sought out by film commissions throughout CARIFOURUM, in acknowledgement of the impact for skills development in the audio-visual industry and other elements in the value chain (e.g. music scoring, site services etc.) as well as for tourism from use of relatively untraditional filming locations such as Jersey the location of *Bergerac;* Botswana (*The # 1 Ladies Detective Agency*), Canada's Atlantic provinces *(The Republic of Doyle*)... and many more locales that have been used to good effect in TV productions that have earned wide audiences. In this respect, the fact that in 2015 a British-French funded police procedural series – *Death in the Caribbean* – shot in and near Guadeloupe and featuring the French Caribbean islands as a scenic backdrop will in 2016 enter its 5th season[14] on *BBC One* TV in the UK and the *France 2* channel in that country is a hopeful indication that similar efforts could bear fruit elsewhere in the region.

5.3.3 For CARIFORUM Fashion

Nothing specific was identified for this report.

5.3.4 For CARIFORUM Jewellery

Nothing specific was identified for this report.

14 https://www.facebook.com/BBCOne/photos/a.500946183259138.112990.470911516262605/906288566058229/?type=1

The CARIFORUM territories have access to a range of minerals, such as gold in Guyana[15], Surinam and the Bahamas; Larimar (blue pectolite) and amber in Dominican Republic[16], and a range of semi-precious minerals and elsewhere throughout the member states. As is the case throughout much of the developing world, while it is known or surmised that the region's geographic features make it highly likely that most of the countries will have some volumes of exploitable minerals, in many cases only those countries where such resources were available at or near surface levels, has much activity to secure these taken place. That is, the investment needed to take explore, map and secure these raw materials has proved to be in short supply. For example, even in the Dominican Republic, which has had a long engagement with the mining of precious metals, it was only in 2012 that exploratory drilling concluded that the commercial exploitation of significant reserves of precious metals – particularly gold – located in the ridges of the north-eastern mountains straddling the DR and Haiti,[17] and with an estimated value of over US$60 billion was feasible. Similarly, in the first quarter of 2015, Suriname announced that the region's first gold refinery[18], an investment between that country's government and a Dubai-based specialist firm, had commenced commercial operations, making possible a range of value-added activities.

Theoretically, the presence of a wide range of precious and semi-precious minerals in the region increases the opportunities for finished works to access the markets of the EU through a mix of entry channels and at various price points. While by no means well-known, the region's hand crafted jewellery has the potential to become well-known internationally if the recent example of an international exhibition in Jamaica in spring of 2014[19] is anything to go by. The EU market could be may be worth exploring as a potential market for the sales of jewellery-grade minerals and precious stones, especially within the market of the traditional luxury companies. In addition EU consumers are very strongly interested in jewellery from developing countries and emerging economies, which represented 38.5% of jewellery imports[20]. As noted elsewhere in this series of reports, much will depend on the ability of the region's artisan-jewellers to familiarize potential European partners and networks with their output, which is not without its major hurdles with respect to national-level business support, difficulties in securing financing, and lack of knowledge of the European marketplace characteristics.

5.3.5 For CARIFORUM Painting

Nothing specific was identified for this report.

5.3.6 For CARIFORUM Arts & Craft

Nothing specific was identified for this report.

[15] Caribbean Community Secretariat, The CARICOM environment in figures 2002, UN, New York, 2003, 137p.

[16] http://amberfactory.com/

[17] http://www.caribbean360.com/news/haiti_news/precious-metals-worth-potentially-20billion-found-in-haiti#ixzz3fmqTefL8

[18] http://www.stabroeknews.com/2015/news/regional/02/21/gold-refinery-opens-in-suriname/

[19] http://www.designcaribbean.com/exhibitor-categories/jewellery

[20] CBI, art. cit.

5.4. Image and Reputation of the CIs

5.4.1 For CARIFORUM Music

The music industry 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 music sector.

To increase the visibility and music brand of the Caribbean artists and bands to reach an international audience, it is recommended that a pilot project to set up a digital platform similar to the Nordic Playlist run by NOMEX. This platform should provide easy access to music that is popular in the Caribbean region at any given time.

5.4.2 For CARIFORUM Film

The region's indigenous film output, that is, films developed in the countries of CARIFORUM using domestic themes and story-lines rather than simply films shot in an island or tropic location etc., is virtually unknown in the EU marketplace. While individual countries may have name recognition (and thus, potentially, brand visibility) the region has no legacy of widely-known indigenous film products. In that sense, Jamaica's *The Harder They Come* made in the 1970s and the Dominican Republic's *In the Time of the Butterflies* from 2001 can be considered outliers.

However, a number of member countries, in particular the Dominican Republic, Trinidad & Tobago, Jamaica and Haiti, have indicated their interest in growing their audio-visual industries, and in some cases have begun to put in the infrastructure to support such – even though it is conceded that much more needs to be done.

The infrastructure, comprising resources derived from both the public and private sector, includes training facilities (up to tertiary level); marketing programmes (including film festivals) and – at least at the discussion stage – some suggestion that governments should consider a quota or preference system whereby a certain number of hours of broadcast time on channels serving these markets must be dedicated to domestic content, thus providing a market for indigenous producers, in a region where cable television service has largely eroded the role of cinemas.

With respect to the last, the concern has been expressed that in some of the smaller CARIFORUM states, such a measure would be impractical given the small size of their markets and the corresponding miniscule numbers that are engaged in the film/audio-visual industries. A suggestion that this may be modified to accord 'national treatment' to audio-visual products from other member states has been occasionally floated but has been met with little discernible enthusiasm.

5.4.3 For CARIFORUM Fashion

The fashion industry 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 fashion sector.

It should be noted that seminars and conferences are a good tool to create awareness, but they rarely create any direct business for companies. Other measures need to be taken to increase business opportunities.

5.4.4 For CARIFORUM Jewellery

None of the EU contact points with whom communication was established by the consulting team, had either positive or negative impressions of the CARIFORUM jewellery industry as there is widespread lack of knowledge regarding what if has to offer, what are its characteristics and who are the players.

From one perspective, the lack of a track record in the EU to this point may not prove to be an insuperable barrier, inasmuch as that situation may present an opportunity for the CARIFORUM region to become "the next new thing" in the marketplace. CARIFORUM CCIs active in this industry will be required to establish a foothold, but without a sustained focus on acquiring marketplace knowledge, time spent on understanding and penetrating networks, and demonstrating to the selected markets that the CARIFORUM CCIs in this industry are able to offer appealing and competitively priced products, it is likely that such attempts will be futile.

5.4.5 For CARIFORUM Painting

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.

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.

5.4.6 For CARIFORUM Arts & Craft

The arts & craft sector of the Caribbean region is not well known in Europe. In general wholesalers do not offer buyers a range of art & crafts from this part of the world. Most arts & crafts are sourced from Asian countries. The luxury retail sector for home ware indicated that their buyers do not travel to the Caribbean to buy arts & crafts, as they had the perception that there was not enough history or culture behind the art & crafts produced in the Caribbean countries. The products did not have a "story" to tell that made it attractive for European customers.

5.5. Structural relations and networks

5.5.1 For CARIFORUM Music

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

As a first step to expand the membership of the Caribbean music sector, we would recommend that the national music trade associations (where such exist) and their members affiliate themselves with the following two international organisations:

- WIN - The Worldwide Independent Music Industry Network is a global forum for the professional independent music industry. It was launched in 2006 in response to business, creative and market access issues faced by the independent sector everywhere. For independent music companies and their national trade associations worldwide, WIN is a collective voice. It also acts as an advocate, instigator and facilitator for its membership (see www.winformusic.org)
- MERLIN - Merlin is the global rights agency for the independent label sector, representing over 20,000 labels from 39 countries. The organisation acts to ensure its members have effective access to new and emerging revenue streams and that their rights are appropriately valued and protected in the digital realm. Merlin represents the most commercially valuable single basket of rights outside of those held by the three "major" labels. It offers Digital Services the opportunity to efficiently and globally license - via a single deal, instead of hundreds of individual local deals – the world's most important and commercially successful music labels. Since its launch, Merlin has established itself as a key partner to the world's leading new-generation digital music services including Google Play, Spotify, Deezer, Beats Music, Sony Music Unlimited, Rdio, rara.com, YouTube and Muve Music. For more information, see www.merlinnetwork.org.

5.5.2 For CARIFORUM Film

Nothing specific was identified for this report.

5.5.3 For CARIFORUM Fashion

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

As a first step to expand the network of the Caribbean fashion sector, we would recommend that the national trade associations (where such exist) and their members affiliate themselves with the International Apparel Federation. This is the right place for the fashion sector to get their international network up and running.

5.5.4 For CARIFORUM Jewellery

Currently the Caribbean jewellery sector is not well represented in international networks.

5.5.5 For CARIFORUM Painting

Currently the Caribbean visual arts sector is not well represented in international networks.

5.5.6 For CARIFORUM Arts & Craft

Currently the Caribbean arts & craft sector is not well represented in international networks.

The Arts & Craft organisations in the CARIFORUM countries should consider signing the International Charter of Artistic Craftsmanship to raise the profile of the sector in the Caribbean region.

5.6. Expand commercial activities

5.6.1 For CARIFORUM Music

For artists and record labels 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.

At a later stage it could be useful to carry out a feasibility study to identify the festivals in the EU with which a twinning festival could be set up in the Caribbean region

5.6.2 For CARIFORUM Film

Nothing specific was identified for this report.

5.6.3 For CARIFORUM Fashion

For fashion professionals to develop and exploit commercial export opportunities in international markets support and grants should be given to participate in trade fairs and fashion weeks. The assistance should be market-led and responsive to allow fashion designers, distributors and buyers 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 Annex 4 for an indicative listing.

In addition the Caribbean Export Development Agency should also look at possibility to co-fund group visits of Caribbean fashion professionals to the EU to meet agents, buyers, distributors and fashion brands. These visits should be organised in cooperation with the relevant national trade associations in the EU. There are various national programmes available in the different EU countries that could be consulted to co-fund the visit.

It will also be useful to organise visits of European distributors, buyers and brands to the Caribbean countries to meet and talk to the different factories and companies involved in value chain of the fashion sector. In the EU Member States there are programmes available for European exporters that could fund their trips.

Both these visits should be organised in a practical way to allow the Caribbean and Europeans to meet and talk with the potential partners. In advance of such visit a mapping should be made of the European agents, buyers, distributors and brands that could meet the needs of the Caribbean fashion sector. It there is a preliminary match people can be brought together of in Europe or the Caribbean countries. The companies on both sides taking part in these encounters need to be screened to avoid disappointment. Also the requirements of the sourcing companies need to be made available in advance. In Annex 4 an example has been attached of a company profile to be completed by the participating companies.[21]

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

5.6.4 For CARIFORUM Jewellery

Nothing specific was identified for this report.

5.6.5 For CARIFORUM Painting

For artists to develop and exploit commercial export opportunities in international markets support and grants should be given to participate in trade fairs and exhibitions. 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.

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.

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[21] This company has been developed by the Dansk Fashion and Textile Association.

5.6.6 For CARIFORUM Arts & Craft

For artists and craftsmen 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.

5.7. Integrated Marketing & Promotion of Offerings

5.7.1 For CARIFORUM Music

Caribbean Export should devise and execute a promotional/marketing campaign to expose the region's musical offerings throughout a focussed listing of industry trade fairs in targeted EU countries. The promotional efforts should package and position the musical offerings of the CARIFORUM countries in the pilot project as representative of one of the world's primary centres of music. Where possible, such on-location marketing should be done in conjunction with the regional tourism promotion organization, the CTO, as well as with other regional entities active in the creative and cultural industries.

The NOMEX model brings together the music export offices of 5 Nordic States with the singular objective of facilitating the growth and development of the Nordic music industry. If a similar collaboration can be achieved in CARIFORUM, this can provide the basis for the development of an equivalent to the Nordic Playlist, designed to bring to the fore the diverse music of the CARIFORUM region.

5.7.2 For CARIFORUM Film

Currently, it is not believed that any CARIFORUM member states provide any support specific to the export of the audio-visual services of their CCIs. To the extent that film festivals – whether those staged in the region or those organized in target marketplaces – are viewed as important forums for bringing the region's audio-visual products to a larger marketplace, it is known that individual CCIs have participated in such.

It is however, not clear what the results have been like, and it is not clear that in the absence of a coordinated strategy that, for instance, groups the works of the CARIFORUM CCIs under a common brand (as is being built-out by Caribbean Tales) the chances of making an impact on the selected EU Markets has much of a chance of succeeding.

5.7.3 For CARIFORUM Fashion

Nothing specific was identified for this report.

5.7.4 For CARIFORUM Jewellery

Nothing specific was identified for this report.

5.7.5 For CARIFORUM Painting

Nothing specific was identified for this report.

5.7.6 For CARIFORUM Arts & Craft

Arts & craft companies should receive support to develop online activities, in particular through a collective branding approach on existing platforms. Some examples:

- **ETSY SHOP** - Artists and crafts persons should be encouraged to grow their independent creative business and open an Etsy Shop. Etsy.com is a global marketplace for craft and design. It is an excellent way to export arts & crafts and reach more than 40 million buyers worldwide and (for the time being anyway) and it is free to an Etsy shop. Artists and craftsmen can access Etsy's free support services and educational resources, including *The Seller Handbook*, the Etsy School and the Etsy Success newsletter. They can also apply to showcase their work at public events, such as the Etsy's art exhibition and Etsy House pop up shop.
- Trade associations should be encouraged to set up platforms on their websites to sell their members´ works online. See example of *Craft Scotland*: http://www.culturelabel.com/vendors/Craft-Scotland/
- *Set up craftmap*: a digital platform that shows the "who-what where" of the arts and craft: artists, in the CARIFORUM countries: artists, craftsmen, specialist museums, education, materials, production spaces etc. See example of the CCNL: http://www.craftscouncil.nl/?Craftsmap

5.8. Collaborations & Networking

5.8.1 For CARIFORUM Music

Through Caribbean Export, CARIFORUM's music industry associations and other relevant bodies should be encouraged to seek strategic collaborations with such forums as WIN (the Worldwide Independent Music Industry Network for the professional independent music industry) and Merlin - the global rights agency for the independent label sector. The organisation acts to ensure its members have effective access to new and emerging revenue streams and that their rights are appropriately valued and protected in the digital realm.

Similarly, the region's music Festivals should seek out and affiliate themselves with such entities as the European Forum of Worldwide Music Festivals (EFWMF) which notes that it "seeks to facilitate links to non-European festivals and networks within the music community". The EFWMF also initiated the worldwide music expos WOMEX and STRICTLY MUNDIAL, and is closely connected to various music markets and events worldwide.

5.8.2 For CARIFORUM Film

There is arguably scope for the region's film industry to create more of a presence in the international community of potential financiers, distributors and ultimately consumers. However, the expense involved in going it alone will serve as a limitation even as it is acknowledged that such forums as on-line marketing of content has made marketing less expensive.

Still if industry best practices are to be considered, the following seem to be indispensable:

- **Identification and targeting of specific film festivals**. Not only are there major locations for the top film festivals worldwide, but the numbers of segment/niche events have also been increasing and any programme of identification/targeting would be well-advised to assess whether the objective is the creation of 'feature films' or whether the areas of interest may include content that falls into such categories as Animation, Children/Youth, the broad category of Documentaries, Short Films, or Food etc. The latter category is a growing one – dedicated to seeing food on film as a window to the cultural mores of societies, and may present opportunities for trans-industry collaborations.
- **Development and Nurturing of Networks**. CARIFORUM CCIs should make the effort to plug into the many national and EU-wide networks that exist and explore partnership possibilities.
- **Develop/strengthen linkages between CARIFORUM film professionals**. Currently the Caribbean Audiovisual Network (including its Association of Caribbean Film Commissions sub-grouping) is working on creating such a network throughout all Caribbean.

5.8.3 For CARIFORUM Fashion

Nothing specific was identified for this report.

5.8.4 For CARIFORUM Jewellery

Nothing specific was identified for this report.

5.8.5 For CARIFORUM Painting

Nothing specific was identified for this report.

5.8.6 For CARIFORUM Arts & Craft

Nothing specific was identified for this report.

6. Regional Export Strategy and Action Plan for CARIFORUM Creative Industries

There is no shortage of ideas for charting a way forward for expanding the exports of CARIFORUM creative products into EU markets. Both CARIFORUM and external experts have proposed a range of actions over the years, and almost uniformly they have been ignored – and sometimes for good reason. It is certainly evident that there is no one solution or set of solutions that will satisfy Caribbean CIs that are at very different stages in their development.

The main strategies outlined below, and the accompanying action plan, comprise a mix of short-, medium- and longer-term activities that are designed to address the marketplace feedback from the selected EU member states, survey responses from CARIFORUM CCIs, as well as salient recommendations from other regional and EU sources. Importantly, respondents identified the types of interventions that they were prepared to self-fund, which is an important index in any assessment of the value they attributed to such activities.

Given the large number of recommendations received, it is impractical to address all. Accordingly, the consultants have attempted to itemize the most practical and implementable. Please note that while these recommendations are numbered, this implies no prioritisation.

6.1. Strategy: Marketplace familiarization

Much of the feedback from the EU points to the fact that very few in those markets have much knowledge of the individual CARIFORUM countries to begin with (with a few exceptions), and even less knowledge of the creative output of these countries (again, with largely the same exceptions). Similarly, per the survey responses, there is a pronounced lack of information on the part of CARIFORUM creative professionals regarding the characteristics of the EU markets and the means by which they may be able to better access them.

CARIFORUM respondents - across all the selected industries - overwhelmingly prioritized participation in promotional activities overseas e.g. trade missions/fairs, exhibitions, festivals etc. In noting that there is little easily-available information on CARIFORUM's creative output, the EU marketplace stakeholders likewise urged greater visibility for CARIFORUM CIs through engagement in festivals, trade fairs and exhibitions. It is through such events that the output of CARIFORUM CIs can become better known in the target markets, and the foundation set for linkages with purchasing decision-makers and potential joint venture partners.

As a first step, it is proposed that Caribbean Export take the lead in the development of detailed database on the most relevant and accessible events; and, in conjunction with the national promotional bodies (e.g. members of the Caribbean Association of Investment Promotion Agencies (CAIPA), national Coalitions of Service Industries (CSIs) and such industry organizations as exist), ensure the dissemination of this information throughout the CARIFORUM community of creative and cultural entrepreneurs. Illustrative information, including, in many cases, the contact details of key administrators, has already been provided in the industry-specific CIs VCA Reports.

With particular reference to painting, arts and craft and jewellery, it is proposed that as a first step Caribbean Export undertake research to identify the extent of funding programmes (e.g. through public bodies and private foundations) that may be approached to provide grant funding and other support to regional artists, curators and researchers to explore the target markets through mobility programmes, artist-in-residencies etc.

In parallel, CIs associations as well as national (and regional) promotional agencies should also research which EU member states provide financial and other support to their artists to travel abroad and establish contacts with the relevant bodies that select participants, to position CARIFORUM as a welcoming region. In an environment where little is known about the region's output in these industries, such interactions can only assist in disseminating information on the region's offerings.

In a few cases, prospects may also exist for the development of national programmes supported by EU member states that involve working with such entities as the Dutch Centre for the Promotion of Imports from developing Countries (CBI) to take enterprises through the market entry process. Caribbean Export will be tasked with developing such a database of opportunities to assist CARIFORUM creative professionals to become more familiar with the EU marketplace.

Following such research, it is proposed that Caribbean Export will disseminate its findings on mobility opportunities through CIs associations for follow-up action.

6.2. Strategy: Engage Influencers (Brand Ambassadors)

Given the consistency of feedback from the various EU member states, it is evident that there is not currently a strong association of the Caribbean region with its creative and cultural industries outside of a few industries (mainly in music, and from a small number of countries. It is equally evident that the region boasts a number of individuals – a few in music, but particularly in sport - whose fame resonates widely outside of the region and who, importantly, have sizeable social media visibility and following.

It is proposed that the region enlist these "influentials" as Brand Ambassadors who will borrow the principle of "curating" from its more restrictive application for the benefit of the region's creative and cultural industries. The modus operandi suggested is to engage these personalities – in this case, primarily athletes and performers – to distribute periodic (e.g. fortnightly, monthly or bi-monthly) lists of their "favourites" from selected CIs from all across CARIFORUM. This model is only slightly modified from the Nordic Playlist developed under the aegis of the Nordic Music Export Programme (NOMEX) whereby celebrities from the 5 Nordic countries select music playlists with the selections available from a range of streaming services such as Deezer, Spotify and WiMP.

One of the considerations of such a programme would be that the curating Brand Ambassadors would not necessarily have to be directly affiliated with the particular industry. Thus a *Shelly-Ann Fraser* or a *Debbie Ferguson* may offer lists on Film; a *Usain Bolt* or a *Kirani James* may focus on Jewellery, whereas a *Lewis Hamilton* or *Rihanna* may highlight their preferences in Painting; a *Tessanne Chin* or *Brian Lara* might take a lead on Arts & Craft*;* a *Juan Luis Guerra* or an *OMI* may present a list on Music, while a *Shaggy* or *Destra* may develop lists on Fashion.

Additionally, the curated lists would be accessible through the social media pages of the Brand Ambassadors, and would be linked to already existing streaming and video on demand sites (in the case of music and film) or well-known e-commerce sites for paintings (e.g. www.deviantart.com, http://fineartamerica.com/art/paintings/ecommerce/all), arts & craft and jewellery (e.g. Etsy.com) or their counterparts in fashion (for some suggestions, see http://ecommerce-platforms.com/ecommerce-websites/independent-fashion-stores, http://www.elle.com/fashion/g8068/best-shopping-websites-2013 etc.).

It is proposed that Caribbean Export, in collaboration with CIs associations and possibly also members of CAIPA, develop the shortlist of individuals and be responsible for securing their engagement. Caribbean Export would also be best placed to spearhead the negotiations with the streaming sites / e-commerce platforms.

It is recommended that this initiative be piloted with a few such Brand Ambassadors; and that, over the short- to medium-term, synergies are planned with large-scale events around the globe during which the public gaze is already turned favourably towards the Caribbean (e.g. Rio 2016 Olympics, CARIFTA Games, Commonwealth Games, Cricket Twenty20 Games, Formula 1® etc.), those which lend themselves naturally to association with the region's CIs (e.g. Edinburgh International Festival, Commonwealth Arts Festival, London's Notting Hill Festival, Toronto's CARIBANA Festival etc.) as well as in-region events which attract considerable attention from outside the Caribbean (e.g. Trinidad's Carnival, St. Lucia Jazz & Arts Festival, Haiti's Festival International des Arts Populaires de Jacmel, Jamaica's Reggae Sumfest, DR's Fiesta de Merengue, Barbados' Crop Over; Antigua's Sailing Week, Maxi Yacht Rolex Caribbean Cup, RORC Caribbean 600 yachting races etc.).

This Brand Ambassador Strategy draws upon one of the hidden strengths of the Caribbean community, the fact that high-achieving individuals whose roots are from the region, are to be found all over the developed world in business, the arts, sports...you name it[22]. It involves recruiting them to lend their connectedness and influence among their peers – and vitally in this age of social media, their "followers" - to an undertaking that invites their networks to discover and enjoy the region's creative diversity.

6.3. Strategy: Celebrate the Story

As noted previously, there is no guarantee even in the case of live music events (festivals, concerts) that musical performers from CARIFORUM are being invited to Europe – not even for festivals which are dedicated to reggae, ska, soca etc. Whilst on the one hand there

[22] There are various lists already compiled of such famous persons associated with the Caribbean e.g. http://caribbean.halloffame.tripod.com, http://blogs.iadb.org/caribbean-dev-trends/2014/09/02/40-famous-pop-culture-personalities-caribbean-descent-may-surprise, http://atlantablackstar.com/2013/09/17/20-entertainers-athletes-caribbean-descentheritagecaribbean-american etc.

appears to be demand for "authentic" performers (who come from the birthplace of one of these musical forms), the market pressures are causing events' organisers to prefer home-grown (therefore, usually less costly) talent from their own – or neighbouring - countries.

Many creative professionals (and their promoters/marketers) today acknowledge that, unfortunately, their "art" – no matter how original and distinctive – is not always the key determinant of their marketplace prospects or value. Rather, it is their "story" or their "personality' that makes the difference. Indeed, this is what allows them to build quality relations with their fans (or customers), and to be considered thought-influencers/leaders (often in relation to a certain demographic which may be valuable to sponsors). It would seem therefore that their "story" is the element that cements a creative professional as "irreplaceable" in the marketplace.

In the case of creative professionals, there is an additional dynamic at play. Fans (or customers, investors/backers) are particularly attracted to what they consider to be the mysterious *creative process* that results in the creative product they so enjoy. For this reason, the most successful media-savvy creative professionals deliberately engage their fans (or customers, investors/backers) at all stages of their creative process; and oftentimes, in many aspects of their lives. Employing the various social media platforms to provide regular updates – using words, audio, and visuals – they allow their fans "a glimpse into their world"…including the location(s) where their creative product is "birthed" (studio, atelier, workshop, editing room) as well as introducing other people who play a significant role in their day-to-day lives (fellow musicians, artists, managers etc.)

If this is true, and there is increasing evidence that this is so, then creative professionals in the Caribbean must be prepared to so engage the "brand management" expertise that is now spreading throughout the connected world. As far as is possible, it is recommended that their "story" integrates seamlessly with relevant e-commerce platforms.

This need not be, it must be said, at the expense of the intrinsic value of the creative product or service: it should be considered a means of standing out in an increasingly crowded market.

6.4. Strategy: Skills Development

A significant number of the CARIFORUM creative professionals surveyed identified their need to be better-equipped so that they could become more successful in their creative businesses – both as exporters or potential exporters, and as entrepreneurs in general. In this regard, many noted such issues as having no business plan to guide their operations, no export plans, limited knowledge regarding intellectual property protection, lack of information on the export process, and other problems.

Accordingly, a skills development and upgrading programme is proposed which addresses general business operations, export growth as well as areas that have greatest saliency for CCIs (e.g. Intellectual Property Rights, including in overseas markets).

It is recommended that this be designed as a recurring programme, to be delivered in modular form, and with a strong orientation to online/virtual learning so as to make more accessible.

Given the costs involved in moving trainers around CARIFORUM where the expertise is not always easily available in country, it would be advisable for partnerships to be forged between creative industry associations and regional training institutions (such as the UWI) or with extra-regional partners (such as the CBI, ITC, WIPO among the many who provide such) to facilitate such online training. In this way, subject matter experts could be engaged to deliver the programme's modules (e.g. Export Marketing, Business Plan Development, Intellectual Property Rights etc.) regardless of their country of domicile.

6.5. Strategy: Pursue Strategic Partnerships

It is recommended that the national and regional CIs organizations (and possibly also other entities knowledgeable of and active in promoting these CIs) establish formal relationships with relevant international bodies to facilitate infusion of industry best-practices as well as to benefit from networking opportunities that may lead to scope for exchanges or other modes of artist mobility.

For CARIFORUM Music – WINC, MERLIN, EFWMF

On a pilot level, it is recommended that a selection of the music industry associations within CARIFORUM pursue affiliation with the Worldwide Independent Music Industry Network (WINC) as well as with the global rights agency for the independent label sector, MERLIN. Through both entities, music industry entrepreneurs/enterprises will have the opportunity to access up-to-date information on industry practices and trends and therefore have a better grasp on how to position their offering of live and recorded music.

The music industry in the Caribbean should also seek to affiliate itself with the European Forum of Worldwide Music Festivals (EFWMF) and its music expo arms, WOMEX and Strictly Mundial.

For CARIFORUM Film – with French and Dutch overseas territories in the Caribbean

The region's film-makers should initially focus on exploring the scope for engaging with their counterparts in the Caribbean overseas territories of France & the Netherlands in developing projects that can receive finance & other development support through existing mechanisms in those countries. One objective should be the development of a TV series that utilizes several regional countries as its main locales and utilizes the skills of regional creative professionals in the process.

For CARIFORUM Fashion/Jewellery/Painting/Arts & Craft – with regional tourism bodies

It is also proposed that the CIs formally engage with a couple of the region's industry-wide bodies championing tourism, namely the Caribbean Hotel and Tourism Association (CHTA, headquartered in Florida) and the Caribbean Tourism Organization (CTO). With membership wider than CARIFORUM alone, both of these have demonstrated their ability to engage in marketing activities for the entire region, proved competent in constantly upgrading their client offerings and increasing their value to their stakeholders.

Such a partnership would seek to leverage the fact that tourism is unquestionably the region's best known brand, and there is reason to believe that there could be rewards from the better exposure of the region's creative output in this massive export industry. Recent research into the tourism consumption patterns indicate that an inordinately high level of the products consumed/bought in the region's hotels are imported from outside of the region. This has led Jamaica, for instance, to create a Tourism Linkages project that regularly brings together purchasing managers form the island's leading hotels and attractions, with domestic providers of goods and services. It is not a stretch to think that CARIFORUM'S CIs, especially those engaged in arts & craft, paintings, jewellery and fashion, could be strengthened by greater success in this market.

For instance, several CARIFORUM countries are considered premium wedding and honeymoon destinations, especially for North Americans, but also for some Europeans. Conceivably, this is a market that can be tapped by CARIFORUM producers of high-quality arts and craft, paintings, jewellery and fashion, in the process expanding the base of foreign consumers (including Europeans) who have been exposed to CARIFORUM creative products.

For all CARIFORUM Creative Industries - CARIFESTA

It is proposed that the CARIFORUM, through Caribbean Export, explore the feasibility of twinning the region's sole intra-regional festival of the arts CARIFESTA, to determine whether there are advantages to be gained by twinning the event with a comparable EU festival.

This is, admittedly, fraught with uncertainty. The good idea of a regional festival of the arts, rotating between member states was introduced long before many other similar and better-known events elsewhere, but has foundered in recent years because at the end it has largely been an event under the control of regional governments. Which is not to deny the fact that the region's geographical spread and the spotty linkages (air and sea) between most CARIFORUM member states is and will long be a major issue inhibiting some types of collaborations. It cannot be gainsaid though that at the time of concluding this report, CARIFESTA was underway in Haiti and it could very well have been taking place halfway across the world as far as many region creative professionals and potential attendees were concerned, given the dearth of information. Still, in the event that there is political appetite for its transformation, it is worth re-configuring it to play the role of a regional meeting and performance event showcasing the best of the Caribbean's creativity.

6.6. Action Plan to Enhance Exports of CARIFORUM CIs

The table below summarises the key activities required for these strategies in a proposed Action Plan for the coming three years.

Table 4: Summarised Action Plan for Regional Export Strategy for CARIFORUM Creative Industries

Activity	Targeted CARIFORUM Creative Industry(-ies)	Task Owner	Year 1	Year 2	Year 3(+)
Strategy: Marketplace familiarization					
Trade shows, exhibitions & festivals	All	Caribbean Export lead with engagement by CIs Associations, CAIPA members, CSIs	Development & dissemination of directory of key industry events	Pilot participation in selected events	Representative participation in validated events
Networking (in-country)	All	CIs Associations, CSIs	Development of industry-wide databases; initiation of programme of CIs networking events	Roll-out of further CIs networking events	
Mobility Initiatives	Esp. Arts & Craft; Painting; Jewellery	Caribbean Export with CIs Associations	Development of mobility database, dissemination to creative professionals	Pilot participation of creative professionals in selected 'mobility' events, evaluation of pilot	Representative participation in validated events
Networking (Regional & International)	All	CIs Associations, CAIPA members, CSIs	Creation of international partnerships with affiliated bodies	Development and implementation of joint work programmes	Implementation of work programme
Strategy: Engage Influencers (Brand Ambassadors)					
	All	Caribbean Export, CIs Associations, CAIPA members	Identification of and negotiations with potential Ambassadors and existing platforms (including e-commerce), Launch of pilot programme	Evaluation of pilot, Expansion of programme (with new Ambassadors and/or platforms, planning synergies with events etc.)	Ongoing programme

Activity	Targeted CARIFORUM Creative Industry(-ies)	Task Owner	Year 1	Year 2	Year 3(+)
Strategy: Celebrate the Story					
	All	Caribbean Export with CIs Associations	Identification of key elements of "brand management" and training for CIs professionals; pilot programme - creation of essential collaterals (e.g. photographs of artist, their studio, creative works), initiation of social media campaign and integration with e-commerce platforms, monitoring of social media analytics (and real-time re-orientation of online brand management tactics)	Evaluation of pilot, expansion of programme (with repeat trainings provided periodically)	Ongoing programme
Strategy: Skills Development					
	All	Caribbean Export (lead), CIs Associations, CAIPA members, CSIs	Development of training programme, including identification of subject experts and topics (e.g. Recognizing and Protecting Your IPR; Acquiring & Using Market Intelligence; Export Finance for CCIs; Use of social media; e-commerce etc.); pilot roll-out, including testing of virtual training delivery for effectiveness and acceptability by creative professionals	Evaluation of pilot, expansion of programme (with repeat trainings for new entrants, and new/higher-level trainings for existing CIs professionals)	Ongoing programme

Activity	Targeted CARIFORUM Creative Industry(-ies)	Task Owner	Year 1	Year 2	Year 3(+)
Strategy: Strategic Partnerships					
With international music networks/entities	Music	Caribbean Export with Music Industry Associations	Securing membership in WIN & MERLIN as pilot involving a few music industry associations, Dissemination of information throughout music industry associations	Evaluation of pilot, expansion of programme	Ongoing programme
With French & Dutch Territories in the Caribbean	Film	Caribbean Export (lead) with Film Industry Associations	Development of pilot programme focused e.g. on story-pitching events	Roll out and evaluation of pilot	Expansion of programme
With regional tourism industry	Fashion, Jewellery, Painting, Arts & Craft	Caribbean Export in partnership with CTO & CHTA			
With Festival Organizers	All	Caribbean Export, CARICOM Secretariat	Determining the feasibility of twinning CARIFESTA with EU festival(s), and deemed feasible, initiation of negotiations with EU counterparts for pilot	Development and implementation of joint work programmes, fundraising etc. for pilot	Implementation of work programmes, leading to organisation of pilot twinned event; evaluation of pilot; expansion of programme

Annexes

Annex 1: Details of Survey Respondents for each CARIFORUM Creative Industry

Table A1-1: Breakdown of respondents in CARIFORUM Music (recorded) value chain

If in 'Music - recorded', please identify what area(s) you work in: (select as many as apply)		
Answer Options	**Response Percent**	**Response Count**
Creation – incl. songwriter (composer &/or lyricist), arranger, producer, musician, other performer etc.	84.9%	79
Music recording – incl. producer, studio manager, studio engineer & other recording staff, artist manager, graphic artist/design/IT etc.	63.4%	59
Manager/provider of rehearsal facilities	25.8%	24
Music publisher	24.7%	23
Manufacture of music-related merchandise	9.7%	9
Manufacture of music instruments (e.g. steelpan)	0.0%	0
Manufacture of CDs, DVDs, & other digital formats	10.8%	10
Agent	15.1%	14
A&R services	15.1%	14
Music radio stations	15.1%	14
Music TV stations	7.5%	7
Music-related (trade) fairs	11.8%	11
Retail outlets - physical premises	2.2%	2
Online sales platforms / services – incl. music streaming, digital downloads etc.	15.1%	14
PR, Marketing, Advertising (incl. publicist)	23.7%	22
Financing & Investment	5.4%	5
Accounting services	1.1%	1
Legal services	2.2%	2
IP registration / management	6.5%	6
Collective Rights Management services	6.5%	6
Shipping / freight forwarding, incl. packaging & insurance services	2.2%	2
Teaching (at any level) - incl. classes, lectures, workshops etc.	18.3%	17
Other (please specify)	4.3%	4
	answered question	**93**

Table A1-2: Breakdown of respondents in CARIFORUM Music (live) value chain

If in 'Music - live', please identify what area(s) you work in: (select as many as apply)		
Answer Options	**Response Percent**	**Response Count**
Creation – incl. songwriter (composer &/or lyricist), arranger, producer, choreographer, performing artist, musician, dancer	79.2%	76
Music production – producer, director, technicians/experts (lighting, sound, make-up, hair, costume etc.)	50.0%	48
Location, transport/travel, catering, security, accommodation, insurance services	10.4%	10
Manager/provider of rehearsal facilities	22.9%	22
Manufacture of music-related merchandise	6.3%	6
Booking agent	17.7%	17
Promoter	28.1%	27
Event organiser	34.4%	33
Event publicist	16.7%	16
Manager/provider of venues for live performances, concerts, festivals, carnivals	12.5%	12
Ticket vendors - physical premises	5.2%	5
Online sales platform/services	5.2%	5
PR, Marketing, Advertising (incl. sponsorship events)	20.8%	20
Financing & Investment (incl. sponsors)	5.2%	5
Accounting services	1.0%	1
Legal services	0.0%	0
IP registration / management	4.2%	4
Collective Rights Management services	4.2%	4
Teaching (at any level) - incl. classes, lectures, workshops etc.	17.7%	17
Other (please specify)	3.1%	3
	answered question	**96**

Table A2: Breakdown of respondents in CARIFORUM Film value chain

If in 'Film', please identify what area(s) you work in: (select as many as apply)		
Answer Options	**Response Percent**	**Response Count**
Creation - incl. script writer, director	80.4%	41
Production - incl. producer, actor, editor, composer, musician, technicians/experts (camera, lighting, sound, make-up, hair, costume etc.)	98.0%	50
Talent management services for film/TV productions	31.4%	16
Location, transport/travel, catering, security & accommodation services	23.5%	12
Manufacture of DVDs & other digital formats of films/TV productions	31.4%	16
Distribution of films/TV productions (incl. sales agents and distributors)	23.5%	12
Cinema networks	9.8%	5
TV broadcasters	29.4%	15
Film festivals	33.3%	17
Retail outlets (physical premises)	3.9%	2
Video On Demand (VOD) platforms / services (for film/TV)	7.8%	4
Other online sales platforms / services	15.7%	8
PR, Marketing, Advertising	45.1%	23
Financing & Investment	0.0%	0
Accounting services	3.9%	2
Legal services	0.0%	0
IP registration / management	0.0%	0
Shipping / freight forwarding, incl. packaging & insurance services	0.0%	0
Teaching (at any level) - incl. classes, lectures, workshops etc.	25.5%	13
Other (please specify)	3.9%	2
	answered question	**51**

Table A3: Breakdown of respondents in CARIFORUM Fashion value chain

If in 'Fashion', please identify what area(s) you work in: (select as many as apply)		
Answer Options	**Response Percent**	**Response Count**
Design of garments, footwear, leather goods and accessories	68.0%	34
Design of fabric patterns	36.0%	18
Production / manufacture of garments, footwear, leather goods and accessories	46.0%	23
Import / wholesale of raw (input) materials - e.g. fabrics, notions/haberdashery etc.	24.0%	12
Manufacture of fabrics and yarns (e.g. Sea Island cotton, hemp)	0.0%	0
Manufacture of fabric patterns	6.0%	3
Modelling agency services	12.0%	6
Location services for fashion shoots, film/TV productions etc.	12.0%	6
Distribution (wholesale and export)	12.0%	6
Fashion catalogues (print or digital)	8.0%	4
Fashion-related (trade) fairs	26.0%	13
Retail outlets - physical premises	28.0%	14
Online sales and/or promotion platforms	12.0%	6
PR, Marketing, Advertising	8.0%	4
Financing & Investment	0.0%	0
Accounting services	0.0%	0
Legal services	0.0%	0
IP registration / management	0.0%	0
Shipping / freight forwarding, incl. packaging & insurance services	2.0%	1
Teaching (at any level) - incl. classes, lectures, workshops etc.	26.0%	13
Other (please specify)	8.0%	4
	answered question	**50**

Table A4: Breakdown of respondents in CARIFORUM Jewellery value chain

If in 'Jewellery', please identify what area(s) you work in: (select as many as apply)		
Answer Options	**Response Percent**	**Response Count**
Jeweller / jewellery designer	91.4%	32
Technical expert/technician with specific responsibilities (e.g. smelting, glazing, stone cutting/polishing etc.)	28.6%	10
Employer of jewellers (excluding educational establishments)	11.4%	4
Manager/provider of studio space(s) for jewellers	11.4%	4
Import / wholesale of raw (input) materials	25.7%	9
Distribution (wholesale or export) of jewellery	17.1%	6
Jewellery dealer	5.7%	2
Jewellery collector (private / for an institution e.g. bank)	2.9%	1
Curator	0.0%	0
Exhibitions / Gallery / Museum	25.7%	9
Auctions	0.0%	0
Jewellery appraiser / valuator	11.4%	4
Catalogues & other publications (print or digital)	5.7%	2
Jewellery-related (trade) fairs	31.4%	11
Retail outlets - physical premises	31.4%	11
Online sales platform/services (incl. virtual gallery)	14.3%	5
PR, Marketing, Advertising	17.1%	6
Financing & Investment	5.7%	2
Accounting services	2.9%	1
Legal services	0.0%	0
IP registration / management	0.0%	0
Shipping / freight forwarding, incl. packaging & insurance services	2.9%	1
Teaching (at any level) - incl. classes, lectures, workshops etc.	40.0%	14
Other (please specify)	11.4%	4
answered question		**35**

Table A5: 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**

Table A6: Breakdown of respondents in CARIFORUM Arts & Craft value chain

If in 'Arts & Craft', please identify what area(s) you work in: (select as many as apply)		
Answer Options	**Response Percent**	**Response Count**
Craft-maker / Artisan / Designer	92.3%	48
Technical expert/technician with specific responsibilities (e.g. weaving, dyeing/fixing, glazing, cutting /polishing)	36.5%	19
Employer of craft-makers / artisans (excluding educational establishments)	21.2%	11
Teaching (at any level), incl. lectures, workshops etc.	36.5%	19
Manager/provider of studio space(s) for jewellers	5.8%	3
Import / wholesale of raw (input) materials	23.1%	12
Distribution (wholesale or export) of arts & craft	42.3%	22
Artisanal / craft-related (trade) fairs	57.7%	30
Catalogues & other publications (print or digital)	9.6%	5
Retail outlets - physical premises	25.0%	13
Online sales platform/services	9.6%	5
PR, Marketing, Advertising	7.7%	4
Financing & Investment	0.0%	0
Accounting services	0.0%	0
Legal services	0.0%	0
IP registration / management	0.0%	0
Shipping / freight forwarding, incl. packaging & insurance services	7.7%	4
Teaching (at any level) - incl. classes, lectures, workshops etc.	25.0%	13
Other (please specify)	1.9%	1
	answered question	**52**

Annex 2: List of Stakeholders Consulted in EU Member States

These complete lists per industry are contained in the industry-specific VCA reports.

Annex 3: Key EU Stakeholders for CARIFORUM's Creative Industries

These complete lists per industry are contained in the industry-specific VCA reports.