

Mapping the Creative & Cultural Industries in the Caribbean

WIPO/CARICOM meeting

Georgetown, Guyana

February 2006

Outline of Presentation

- Framework from WIPO Guide
- Experience from Caribbean studies
- What we need to know
- What we currently know
- The EU PROINVEST/CRNM Study



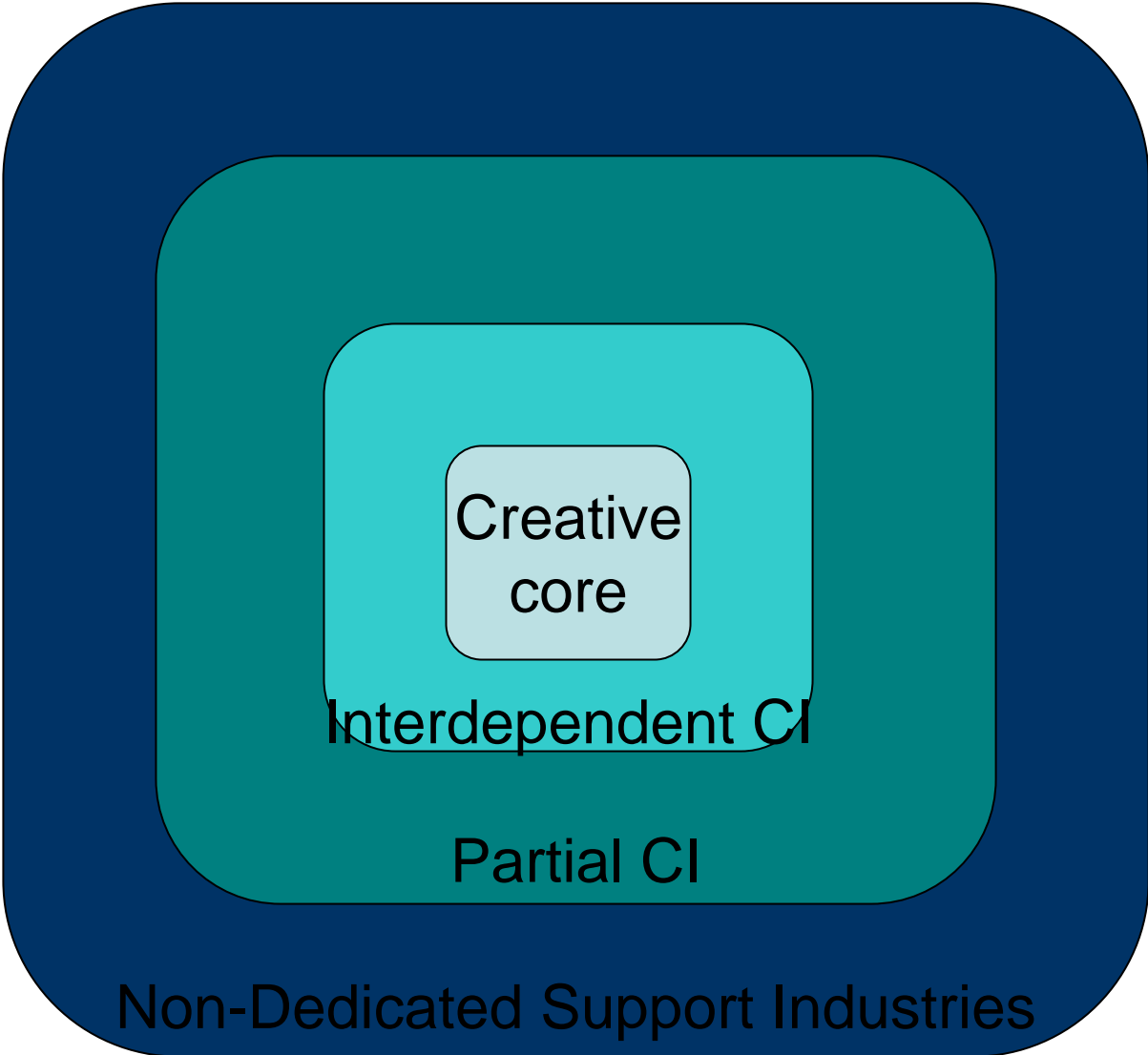
Creative
core

Live Performance

Distribution & Delivery

Associated Activities

Tools of the Trade



Creative
core

Interdependent CI

Partial CI

Non-Dedicated Support Industries

What Do we Need to Know?

- National Statistics
 - Exports
 - Employment
 - Contribution to GDP
 - Infringement
- International Statistics
 - Foreign Sales
 - Use of Works
 - Competition
 - Marketing intelligence
 - Infringement
 - Media Value

Key Studies and Surveys of Caribbean Cultural Industries

| Countries | Sector/s | Commissioner | Author/s |
|------------------------------------|-------------------------|-------------------------------------|----------------------|
| Jamaica | Music | UNCTAD | Witter (2002) |
| CARICOM | Music and Entertainment | CRNM | Henry & Demas (2001) |
| Jamaica, Dom Rep, B'dos, T&T, OECS | Music | Caribbean Export Development Agency | Nurse (1999) |

Key Studies and Surveys of Caribbean Cultural Industries

| Countries | Sector/s | Commissioner | Author/s |
|--|------------------|--------------------------|-------------------|
| T&T | Audio-Visual | TIDCO | Paddington (2002) |
| OECS | Audio-visual | Commonwealth Secretariat | Bully (2002) |
| Jamaica, B'dos, Dom Rep, St. Lucia, St. Kitts, T&T | Festival Tourism | IDB | Nurse (2002) |

The Key Income Streams with a Focus on Exports: The 1996 & 1997 Studies of Cultural Industries in T&T

| Goods/ Merchandise | Services | Intellectual Property | Related Income streams |
|--|---|--|--|
| <ul style="list-style-type: none"> •Soundcarriers •Music instruments •Books •Videotapes & DVDs •Visual Arts (e.g. Paintings) •“Mas” Costumes | <ul style="list-style-type: none"> •Live music performance •Sound, lighting & stage •Festivals •Performing arts | <ul style="list-style-type: none"> •Royalty income •Music publishing | <ul style="list-style-type: none"> •Cultural & festival tourism •Media value •Ancillary sectors |

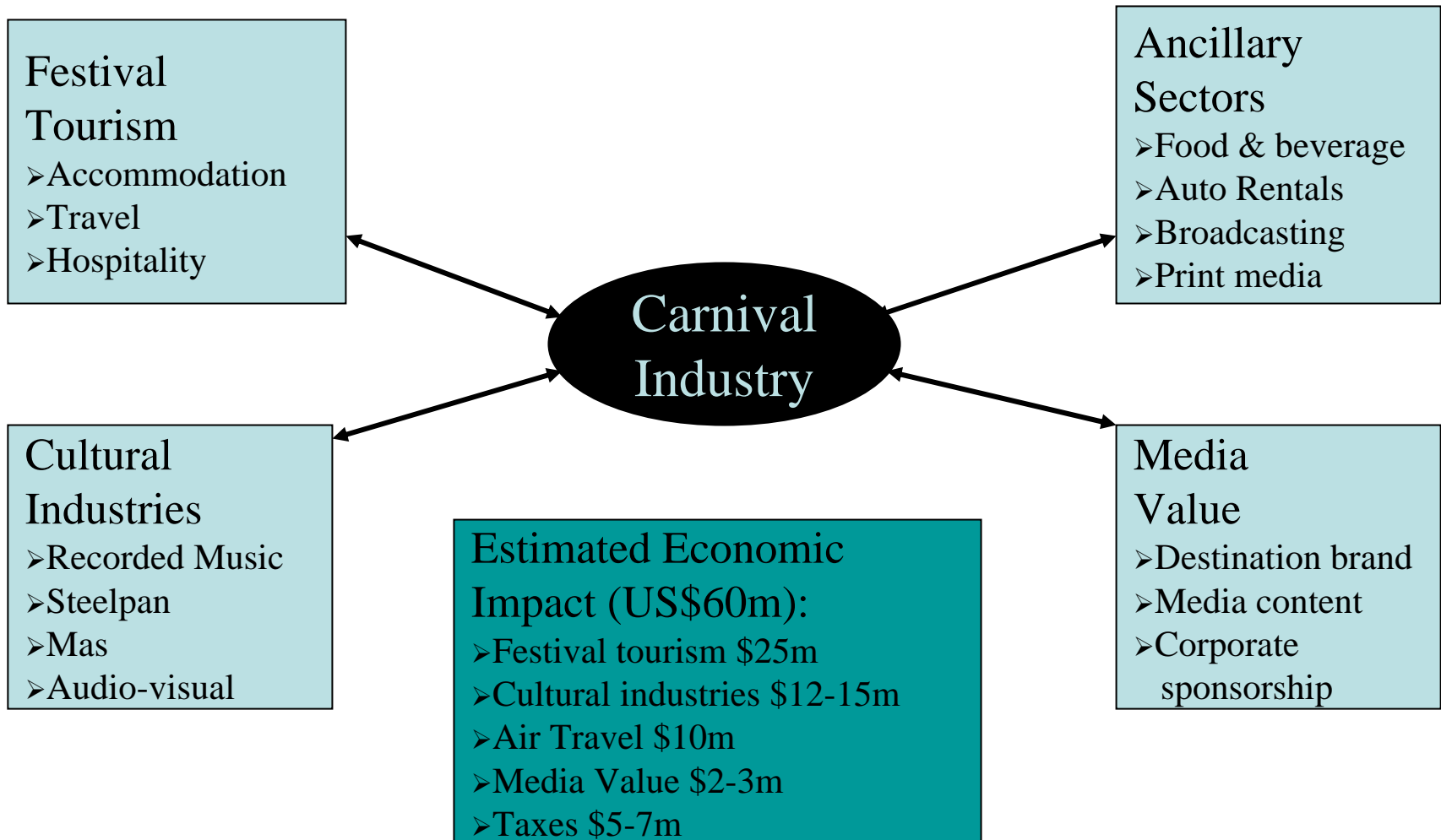
ECONOMIC IMPACT OF CARIBBEAN MUSIC INDUSTRY

| Countries | FEX (US\$m) Employment | Key sub-sectors |
|-------------------|---|--|
| Jamaica | <ul style="list-style-type: none"> • \$80 - 100m • 15,000 persons | <ul style="list-style-type: none"> • Recording industry • Live performance • Festival tourism |
| Trinidad & Tobago | <ul style="list-style-type: none"> • \$50 - 60m | <ul style="list-style-type: none"> • Festival tourism • Live performance • Recording industry |
| Barbados | <ul style="list-style-type: none"> • \$20 - 25m | <ul style="list-style-type: none"> • Live performance • Festival tourism • Recording industry |
| Eastern Caribbean | <ul style="list-style-type: none"> • \$20 - 25m | <ul style="list-style-type: none"> • Festival tourism • Live performance • Recording industry |

FESTIVAL TOURISM IN THE CARIBBEAN

| | Trinidad Carnival (2004) | St. Lucia Jazz (2000) | Barbados Cropover (2000) |
|-------------------------|--------------------------------|-----------------------------|--------------------------------|
| Visitor Arrivals | 40,055 | 11,041 | 3,485 |
| Visitor Exp. (US\$m) | 22.0 | 14.8 | 3.2 |
| Benefit-cost ratio | 4:1 | 9:1 | 2.9:1 |

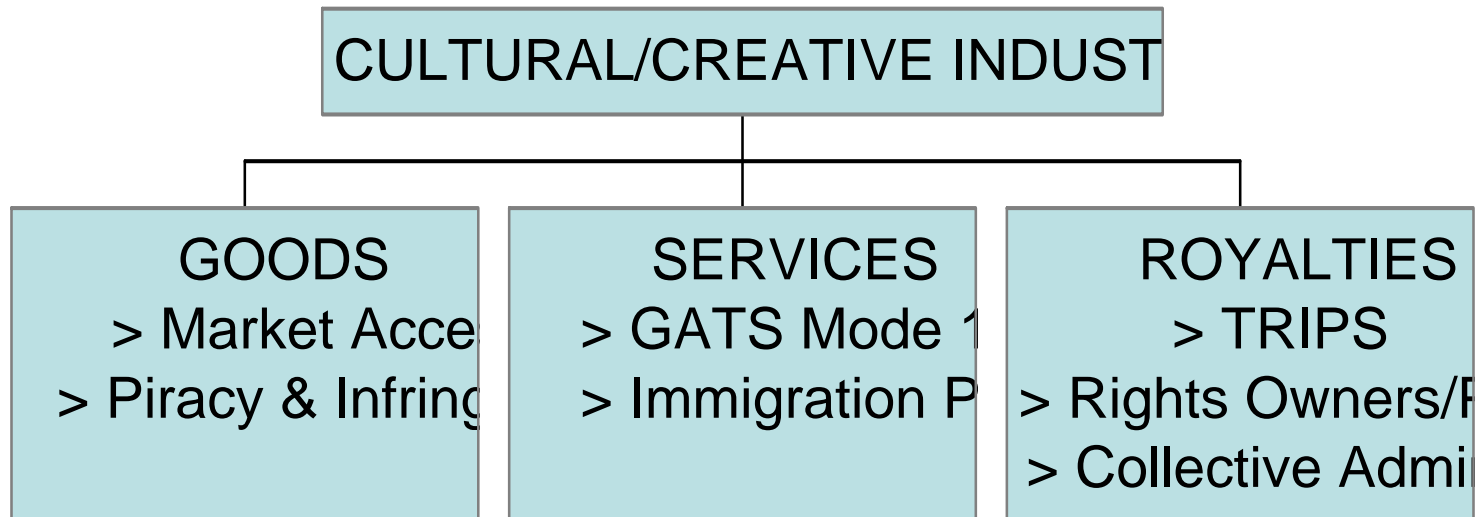
Carnival Industry Structure and Economic Contribution



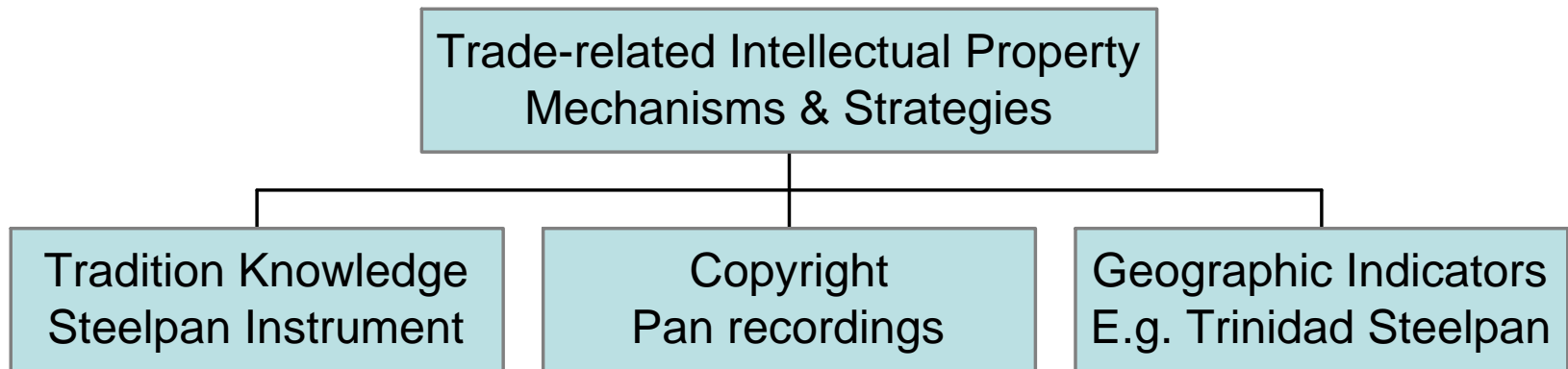
Economic Contribution of Diasporic Caribbean Carnivals (2002)

| FESTIVAL | ATTENDANCE | VISITOR & AUDIENCE EXP. |
|-----------------------|-------------------------|-------------------------|
| Notting Hill - London | 2 million over two days | STG£93 mn. |
| Labour Day – New York | 3 million | US\$70 mn. |
| Caribana – Toronto | 1 million | Cnd\$200 mn. |

Cultural/Creative Industries: Linking Trade Policy to Intellectual Property



Linking IPRs to Trade, Industrial and Innovation Policy: The Case of the Steelpan in Trinidad & Tobago



Key Elements of the EU Proinvest - CRNM Study

- Phase 1 - Global & Regional Situational Analysis
- Phase 2 - Economic Impact Assessment and Competitiveness Analysis
- Phase 3 - Trade & Industrial Policies
- Phase 4 - Strategic Industrial Action Plan

Sectors Covered in the Study

- a. The Music Industry, including the recording, live performance and music publishing.
- b. The Film and Television, including on-location productions.
- c. The Media Industry, including radio and television broadcast, cable and satellite television and “new media” (e.g.the Internet, mobile telephones)
- d. The Book publishing industry
- e. The Performing Arts
- f. The Visual Arts
- g. Festivals and Cultural Tourism
- h. Collective Management of Copyright & Related Rights
- i. Fashion and Glamour