

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



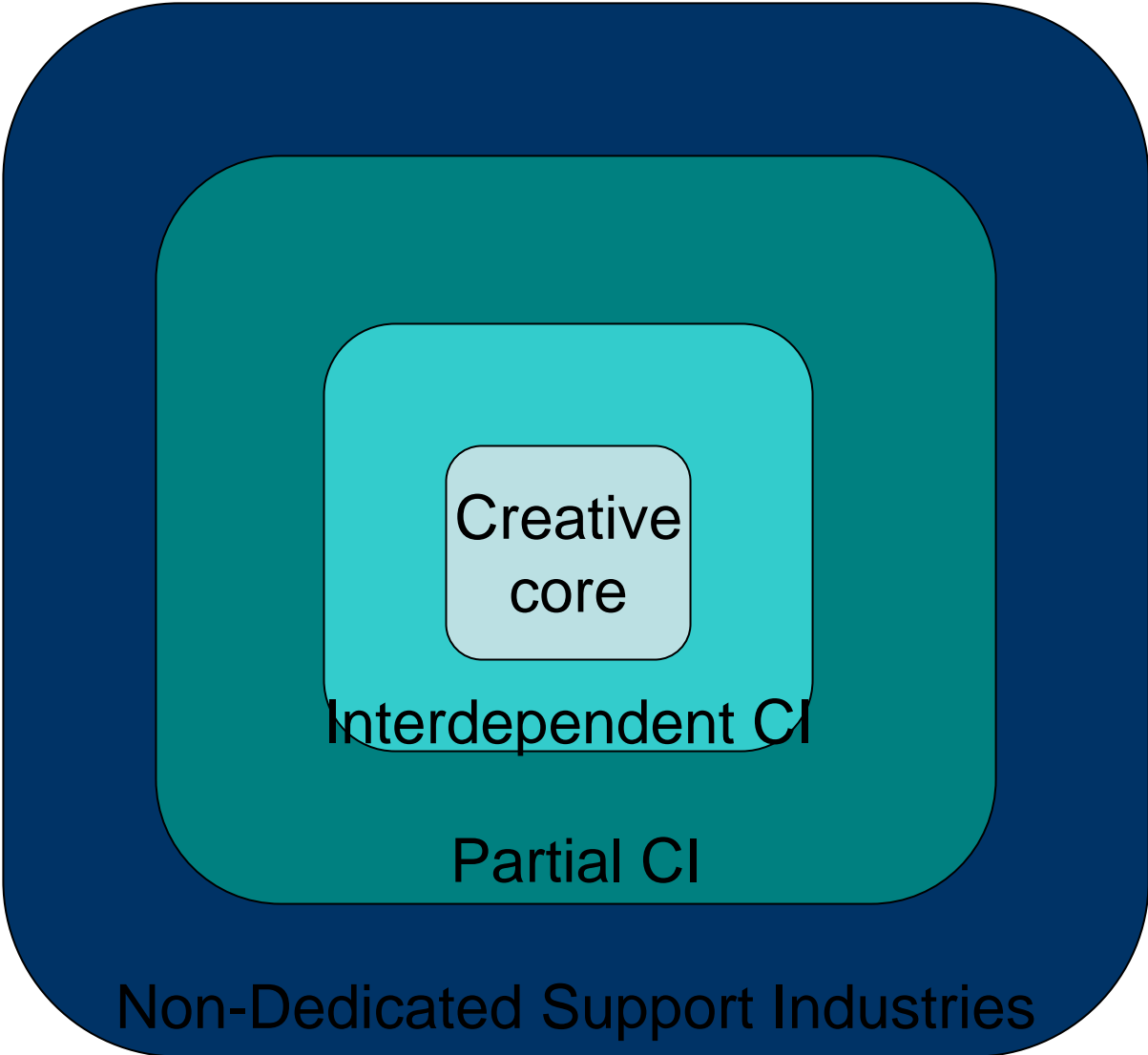
Creative
core

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

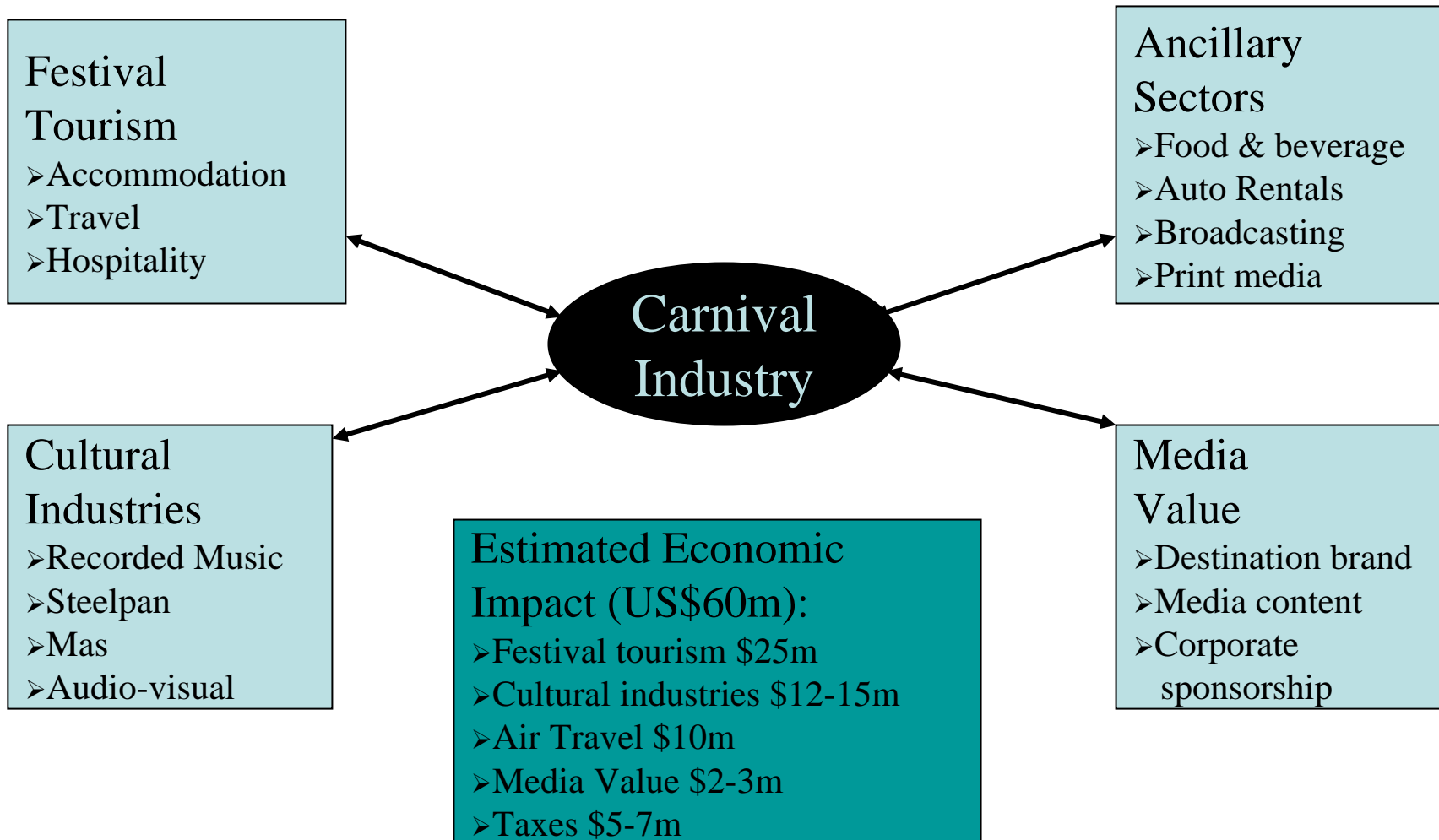
ECONOMIC IMPACT OF CARIBBEAN MUSIC INDUSTRY

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

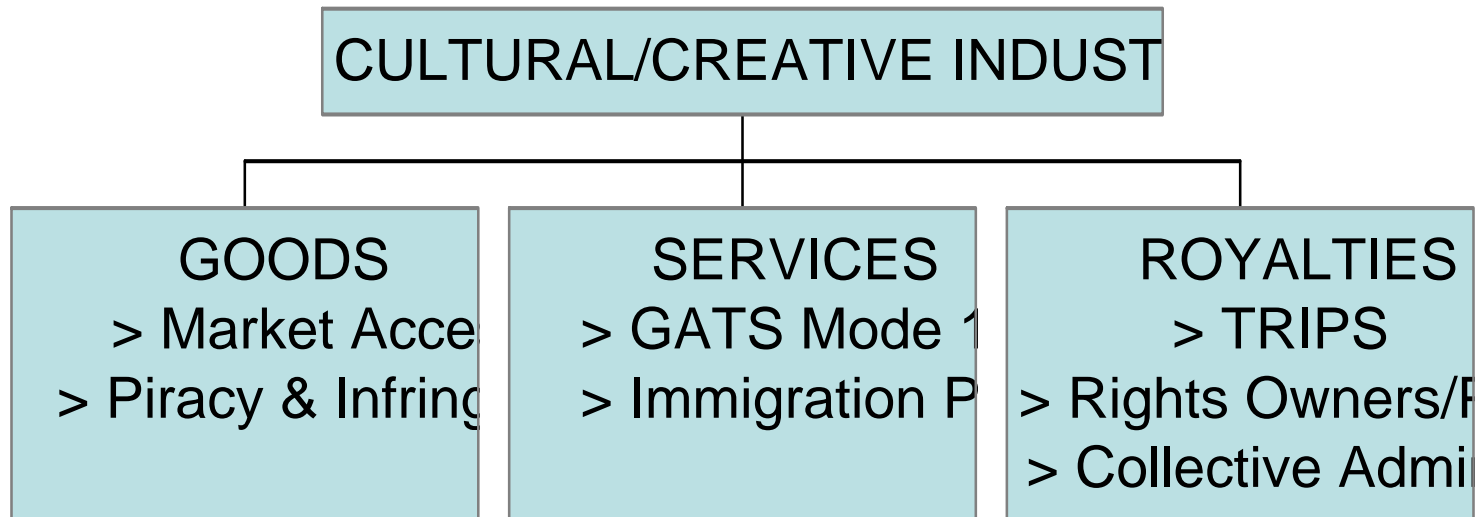
Carnival Industry Structure and Economic Contribution



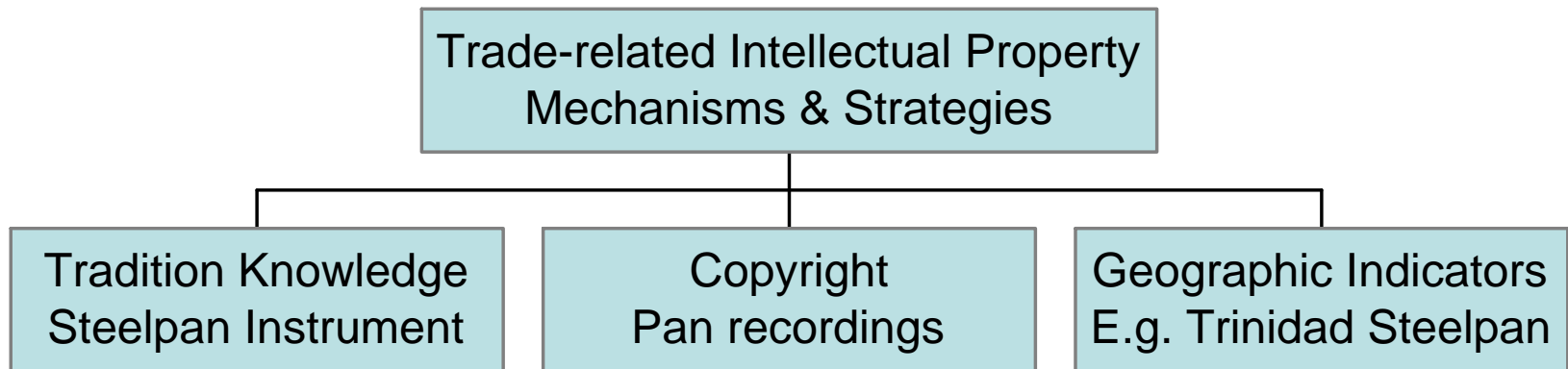
Economic Contribution of Diasporic Caribbean Carnivals (2002)

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