

A study on the creative industry as a pillar of sustained growth and diversification

The film and music sectors in Jamaica:
lessons from case studies of successful
firms and ventures

Michael Hendrickson
Sonjah Stanley Niaah



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Abstract

In 2007 the Caribbean Community (CARICOM) published ‘The Cultural Industries in CARICOM: Trade and Development Challenges’ report, which stated that the film and music industries refer to “aesthetic, identity, and copyrightable goods, services and intellectual property. They represent a wide array of activities that make and circulate sounds, words, and images or a combination of these. It applies to artistic, creative, and copyright works that are for sale, license, commercialisation, or display in some marketplace or public arena.” Using the definition in the CARICOM report, this study will identify the critical success factors that have resulted in the global competitiveness and sustainability of individuals, firms and ventures within the music and film subsectors in Jamaica. To anchor the study of the individual firms and ventures, the study first evaluates the historical evolution and recent trends in the development of the music and film subsectors, including their economic contribution and the main challenges and opportunities for their further development and lessons learned.

The study explores the value chain of both sectors with a view to formulating strategic recommendations for their development. Primarily, this involves an investigation of the industries’ market structure, their economic (labour and tax payments) contribution to national development, export performance, as well as annual financial contribution from the Government of Jamaica through various instruments aimed at strengthening the industries’ regional and global efficiency and competitiveness. The discussion relies heavily upon primary and secondary data, as well as elite interviews with key industry stakeholders and national policy makers. To this end, the study emphasizes the importance of innovation policy, increased knowledge-based training for industry practitioners, innovative financing and legal frameworks, as a basis for increased competitiveness and sustainability. The film and music sectors are multi-faceted in that there are several transaction networks, linkage industries and income streams available to practitioners. Measuring the economic impact and performance, while recording the best practices of the industries, calls for a sophisticated range of measurement tools and analytical devices. However, the challenge in advancing this type of analysis is exacerbated by weak institutional frameworks resulting in limited and or outdated data and non-publication of relevant data on the performance of the sectors.

This paper devotes a sizeable amount of discussion toward the challenges and opportunities of the new digital landscape including information and communication technologies that have revolutionized the industries, particularly the music sector. The advances in digital technology and their adaptation to the industries have resulted in the disruption/retardation of traditional revenue streams, but have also created new income streams that were previously unavailable to the music and film practitioners. For example, new technologies have resulted in low cost digital recording which has facilitated the diffusion of sound, text, and image production by small entrepreneurs without any appreciable compromise in quality. Therefore, feature films can be shot digitally at a fraction of the cost of older analogue technologies. Mass production technologies have been replaced by niche production and mass customisation. This exploratory paper therefore outlines the challenges posed by the digital advances and success stories of industry practitioners who have modified their business operations to better benefit from the digital changes. The study uses the value chain of the industries to discuss the digital technologies that have impacted the industries' production processes, distribution channels and consumption modes. The paper is constrained by data limitations and the limited response to a survey instrument that was fielded.

Through a series of case studies, the paper arrived at the following recommendations:

- Strengthen the weakest links in the music and film value chain;
- Develop quotas for Jamaican content on Jamaican airwaves, following the advancements in Canada, Australia and France, which ensured that their local music was consumed predominately by their citizens, resulting in its growth locally and internationally;
- Strengthen the other components of the value chain and network;
- Develop an innovative approach to music and film financing;
- Develop a wider modern film distribution model that matches the digital age;
- Develop film and music sector incubator projects;
- Leverage the regional market and international trade agreements by creating a harmonized legislative and incentive-driven framework to facilitate cross-border production, trade and exhibition of regional films;
- Implement national and regional incentive schemes tied to a comprehensive policy framework.

Introduction

This study focuses attention on the success of Jamaica's music and film sectors. It is pertinent to place these sectors within a broader framework of socio-political and historical conditions, as well as regional developments over the past fifty years. Contemporaneously with the establishment of the University of the West Indies in 1948 were the emergence of Jamaica's first musical genre called mento, and the adoption of Jamaica's Film Act. Establishment of the film and music sectors has been at the centre of Jamaica's development. While the first film shot in Jamaica is dated at the turn of the twentieth century in 1910 and indigenous music around the start of World War I, Jamaica since the middle of the twentieth century has punched above its proverbial weight category on the global scene. Signalling one of the highest creativity outputs based on musical genre creation and a burgeoning creative sector buttressed by dance, film and fashion, data capture and rationalisation of data sources remain a major challenge despite efforts by the Government of Jamaica to develop a 'satellite accounting system' for the creative sector which is still to be realised.

The Jamaican music sector through its development around the 1940s, but more distinctly in the late 1950s and 1960s, has uniquely embedded business practices, spaces, politics and technologies including the sound system and later, the changing role of radio vis a vis the sound system. Though local and international scholars, institutions and media have invested in the documentation of significant elements of the sector, the challenge of data gathering and dissemination is pronounced. While the study of Jamaican music culture is advanced, the business models and value chain have had less scholarly attention. Witter (2004), Nurse (2006) and Howard (2016) have contributed immensely to the documentation of such aspects. However there is much more to be done.

On 15 December 2015, the city of Kingston in Jamaica was designated a United Nations Education, Scientific and Cultural Organisation (UNESCO) Creative Music City. This designation cemented prevailing sentiment regarding the island's musical output in the form of distinct musical genres given to the world in the latter half of the twentieth century in mento, ska, rocksteady, reggae, nyabingi, dub, and dancehall. Kingston is now among 116 cities in the creative cities network benefiting from partnerships and the sharing of best practices toward a sustainable music economy.

In a pre-digital age, a small domestic market with unconventional business practices was an obstacle to sector development and growth. While in the past, Jamaica was narrowly defined as an island of music, of fierce independence and flair, today it is a hotbed of increasingly convergent creative practice, where music, film, fashion, digital technologies, performing arts and other sectors are symbiotically linked inside the Jamaican creative portfolio. There is significant convergence between music and film in particular, and this explains the pairing of these sectors for greater scrutiny in the context of this study. These two sectors are well placed to boost each other, examples of which are seen in the driving force of commercial films such as *The Harder They Come*, *Ghett'a Life*, and *Dancehall Queen* in the promotion of the distinct Jamaican sound track.

In the wake of the digital musical landscape, the local music sector is changing, while simultaneously facing unprecedented challenges requiring new levels of agility for survival. The articulation of that survival is tied up with strategic articulation of a comprehensive creative industry strategy around which there has been movement at the national and regional levels. There are deeper socio-cultural issues at the heart of the development of these sectors. For example, the film sector has developed on the lifestyle and support of an elitist Jamaican and international clientele including Ian Fleming of James Bond fame, while the music sector, in diametrical opposition has emerged from the lower classes that are well represented through their creative products locally and internationally. Both sectors have also learned from each other. Films have had to take account of the postcolonial class reality in Jamaica and music has, through the professionalization of various players in the sector made international leaps to successful crossovers and label alliances in what may well be considered elitist landscapes. Nonetheless, the growth of the sectors is symbiotically linked but face challenges still.

In light of the considerable creative output in Jamaican music, one might ask the question: *why is Jamaica still grappling with finding creative paths for the growth and development of its music sector?* The answer lies partly in the postcolonial problem of inheriting economic models that have not been able to make visible, nor quantify the value of, creativity in national budgets. This has left a disconnect between what many Jamaicans do to create income, and the creativity that gives pleasure after work. The answer also lies in the structures that have not created a solid enabling environment for the creative sector.

Various steps have however been taken including at the regional level. A Draft Regional Development Strategy and Action Plan for the Cultural Industries whose objective is growth of the Caribbean's creative economy, was approved in principle at the Council for Human and Social Development (COHSOD) Twenty-Second Meeting in February 2012 in Guyana. Creating incentives, establishing a regional registry fed by national registries, research and data collection, a legislative platform including cultural policies and cultural industries development or encouragement acts for supporting industries, export promotion, increasing investment and financing, were all articulated as part of what was necessary to create an enabling CARICOM environment for the creative sectors¹. The Plan acknowledged international successes in the context of 'under-served, under-incentivised and under-financed' sectors. There is also a need for transformational thinking – 'a paradigm shift' - in relation to the creative sector, because part of what lies at the heart of the challenge to moving forward are continuing unfavourable perceptions of the sectors and creative work produced by mostly working class persons which act as a barrier to making culture everyone's business.

Consistent with the findings highlighted in the CARICOM (2012) Strategic Plan are the following weaknesses and strengths in the music sector, many of which remain in 2017. Strengths include the fact that 'Caribbean music is generally well known and popular globally; there is expanding participation by the youth in various aspects of the music industry; and there is growing availability of technology and the ability to access markets.' Weaknesses include the matter of 'low levels of professionalism and industry understanding, weak understanding of the business of music and skills to navigate the sector, the lack of necessary support services e.g. entertainment lawyers, publicists, artist managers, image developers, the lack of strategic and diverse planning for regional and international success, low output

¹ See 'Regional Development Strategy and Action Plan For The Cultural Industries In CARICOM', 2012 <http://caricom.org/development-of-cultural-and-creative-industries-in-caricom/> for more information on the CARICOM process.

and standards of marketing, merchandising, distribution, and branding.’ Areas of strategic intervention were identified and recommendations for future growth of the sector at a regional level included the following:

- “Build awareness on the business aspects of music production, new business models and the impact of technology;
- Assist emerging practitioners, in particular youth with mainstreaming, marketing and professional development;
- Improve policy and legislative environment for collaboration, partnerships and building of trust among players”².

The development of the cultural industries and their potential for impacting national and regional development can be improved by policy development in keeping with a philosophical framework for safeguarding cultural heritage with linkages across various sectors. This requires strategic intervention for creation of an enabling environment where plans developed are systematically implemented and the challenges around governance and financing are solved at the policy and legislative levels. For example, in relation to financing, Jamaica’s creative output would benefit significantly from increased funding and the current creative output, when matched at the per capita level is deceptive.

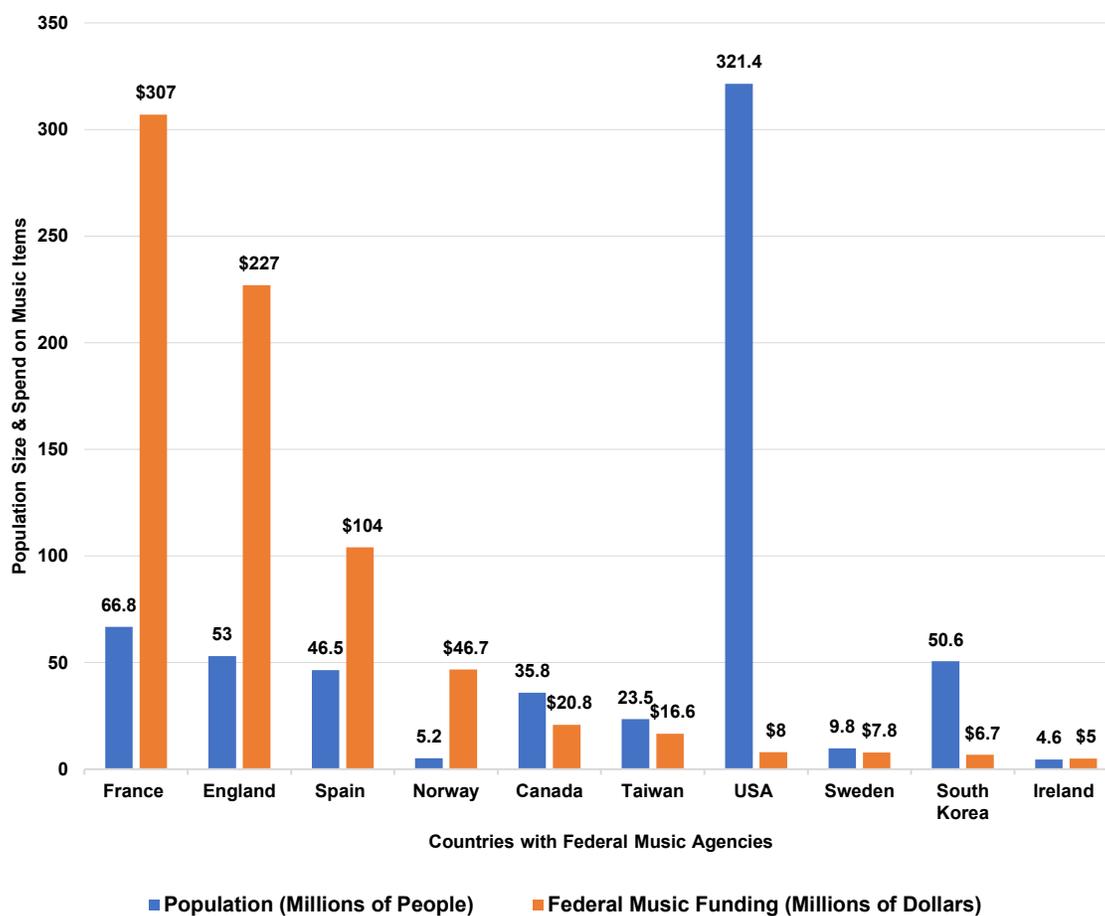
A survey of how music is funded globally reveals a combination of public / private partnerships, private support and federal/government support, often through arts councils or national endowments. A comparison of the United States (US\$8m), Britain (US\$227m), and Sweden (US\$7.8m) by funding vis a vis population size as shown in figure 1 reveals the stark contrast in federal / state funding for music. Britain’s population size of some 53 million is outstripped by the allocation of music funding to a complex sector. Of note, Britain’s popular music sector which began around the same time as Jamaica’s, today boasts some of the highest earning pop stars in Ed Sheeran, Adele, and Sam Smith. Compared to Jamaica which, with a population of 2.9 million has given the world eight distinct genres of music with funding and support which are tenuous at best. With funding as a challenge what is necessary is a shift in the way governments treat art. Arguably art should be treated as an indispensable part of the socio-economic fabric of society and efforts should be made to create an enabling environment to systematically reap the economic benefits within sectors such as music and film. Along the music value chain, there is another challenge which pertains to the transnational movement in persons and their creative output. Analysis of the models of supply and consumption reveal that transnational production and consumption are critical to the development of a robust music ecosystem. This requires ease of movement for artists, support staff and equipment to facilitate their trade. On the contrary, however, movement of individuals have been hampered by stringent non-reciprocal visa arrangements and limited business to business contacts.

Despite these constraints, Jamaican artists continue to ply their trade in the high consumption markets of North America, Europe and increasingly in South America. However, the costs involved in conducting their trade remain high. There is also the movement of goods as well as the final production of goods in sites beyond the Caribbean including the mastering of recorded music within metropolitan centres such as Miami, London and New York. Moreover, the trade in music goods also takes place via established commercial enterprises owned and operated in a transnational context including home studios owned by Jamaican artists outside Jamaica³.

² Ibid.

³ See for example Nurse, Keith, 2009. ‘The Creative Sector in CARICOM: The Economic and Trade Policy Dimensions’. http://cms2.caricom.org/documents/13188-concept_paper_creative_sector.pdf (accessed October 8, 2017), p.7.

Figure 1
How countries around the world fund music - minimum amounts spent by country's Federal Arts Agency on music-related items



Source: <https://pitchfork.com/features/article/how-countries-around-the-world-fund-music-and-why-it-matters/>.

I. Music and the changing digital landscape

The 2016 International Federation of the Phonographic Industry (IFPI) Global Music Report indicated that revenues from digital sales accounted for more than 50 per cent of the recorded music market in 19 countries. Essentially the market for consumption of music grew by 5.9 per cent in 2016 considered a high since 1997. For 2016 total revenues reached US\$15.7 billion⁴. Within digital revenue, downloads remain the frontrunner with 45 per cent (US\$3 billion) of generated revenue, while streaming is close behind at 43 per cent. However, it should be noted that the global revenue from streaming increased 45.2 per cent to become the industry's fastest-growing revenue source at US \$2.9 billion, while the revenue from downloads fell by 10.5 per cent when compared to 2015.

If statistics remain consistent, it will be possible to continue to see physical unit sales and downloads fall as streaming rises to keep digital consumption afloat as the primary listening format. As represented by the global consumption patterns below, music is no longer primarily accessed via physical units such as CDs, vinyl and dubplates. The global shift to the digital consumption of music has been felt by the local Jamaican music sector and evidenced most profoundly in the fall in record/album sales across the board. In a 2013 World Intellectual Property Organization (WIPO) Report Bowman noted that “as consumption patterns have changed due to technology, Jamaican popular music on a national level has been adversely affected.” Bowman used the example of the dubplate costs which fell from a high of USD \$1,000 per dubplate pre-2008 to USD \$200 per dubplate post-2008. While rates differ depending on factors around market demand, artiste, sound system, and access, the decline is an indicator of contraction in the overall demand for dubplates.

The 2016 Music Consumer Insight Report highlighted some key factors in the changing music landscape which impact all markets:

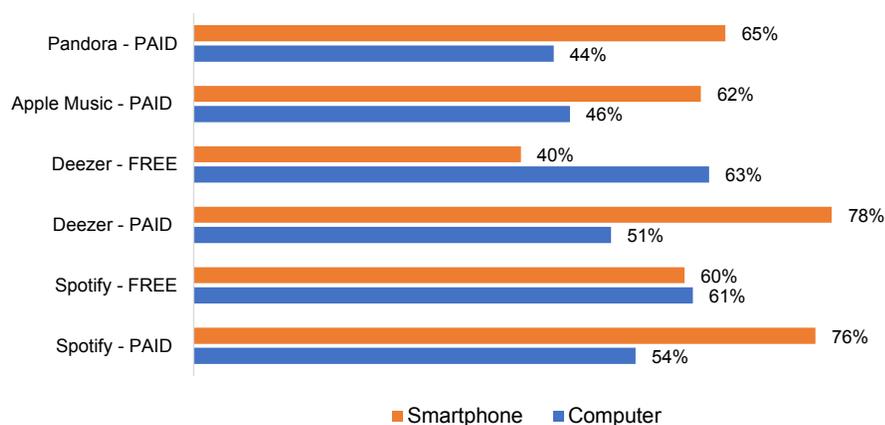
- Audio streaming services have attracted a growing number of users for many reasons, the most common cited being ease of use, including portability, followed by the value found in having a wide variety of music available and the ability to discover new music.

⁴ For more information see IFPI Global Industry Report 2017 <http://www.ifpi.org/downloads/GMR2017.pdf> (accessed July 2017).

- Playlists are another attraction – both creating new playlists and using tailored and recommended playlists.
- Security is an important variable to many choosing to stream music. Users mention trust in the service, a safe environment, and security around the payment process.
- The ability to listen offline (for example, on mobile devices) and without advertising are key attractions for paid streaming services.
- Free streaming is popular precisely because it is free, offering access to a wealth of music at no cost.
- Audio streaming is valued for its ease of use and the vast range of content available. Consumers also value trust and security, wanting to ensure they are accessing official, licensed music services.
- More than 8 in 10 paid audio streamers are also purchasers, either of physical or paid downloads (82 per cent) or live performances.
- 55 per cent (10 per cent more users from 2015) of internet users listen to music via a smart phone.
- The fastest growing countries in terms of music listening on smart phone are:
 - United States of America, 29 per cent more users than 2015
 - Japan, 26 per cent more users than 2015
 - France, 12 per cent more users than 2015
- Smartphone's are increasingly becoming the device of choice for accessing licensed music services, particularly paid for services. Compared to 2015, significantly fewer internet users turn to computers for music listening (66 per cent in 2016 versus 69 per cent in 2015) while significantly more listen to music on a smart phone.
- 55 per cent of consumers have listened to music on their smart phones within a 6 months period in 2016 when compared to 50 per cent within a 12 months period for 2015.

As shown in figure 2 those who listen to music via paid streaming services are more likely to be doing so via a smart phone. The offline usage functionality of paid audio streaming services is potentially an important factor here.

Figure 2
Smartphone usage for music by service



Source: 2016 Music Consumer Insight Report.

- Overall, 82 per cent of those using YouTube do so for music related activities. This is highest amongst 16-24-year-old YouTube users. YouTube’s music use is particularly high in Mexico, Brazil, Italy and Spain, where over 90 per cent of all YouTube users have used the service to listen to music.
- Copyright infringement remains a significant problem: more than one-third (35 per cent) of internet users’ access unlicensed music content. Infringement is changing, with half (49 per cent) of 16-24-year olds stream ripping from sites like YouTube.
- Licensed digital services have widened consumer choice, with increasing numbers of consumers paying for audio streaming services. 7 in 10 (71 per cent) internet users consume licensed music, with many engaging with multiple access methods. Roughly a half (48 per cent) of all internet users pays for music in some form.

About a quarter (23 per cent) of internet users use Google to get “free” music, of which two-thirds (66 per cent) explicitly search for pirated content. This rate is particularly high in Mexico, Brazil and the USA, where almost three-quarters of those who search for free music on Google are searching for infringing websites.

Table 1 shows that Jamaica’s exports of creative goods and services were estimated to increase from US\$40.8 million in 2003 to almost US\$54 million in 2012. At the same time, creative imports were estimated to grow from US\$49.8 million to US\$154.10 million. This indicated that Jamaica’s trade deficit in creative goods and services was US\$91.11 million in 2012. Although the available data might not capture the full extent of Jamaica’s trade in creative products and services, the substantial trade deficit is a cause for concern. It could be argued that more strategic and targeted policies and programmes to develop the sector, including an improved incentive framework and business environment could help to improve the country’s competitiveness in the sector.

Table 1
Jamaica’s trade in creative goods and services
(US millions)

	2003			2012		
	Exports	Imports	Balance	Exports	Imports	Balance
All creative industries	40.80	49.80	(9.00)	62.99	154.10	(91.11)
All creative goods	0.00	0.00	0.00	9.04	145.52	(136.48)
All creative services	40.80	49.80	(9.00)	53.95	8.58	45.37

Source: UNCTAD’s Creative Economy Report, 2016.

The landscape for the consumption of Jamaican music has undoubtedly changed but, what explains the continued development of this sector? What are its major components, success factors and key practices for sustainable development? This study outlines an attempt to answer these questions in the wake of challenges around data collection, funding opportunities for the growth of the sector, and realistic assessment of the success of the sector. Using a qualitative design around elite interviews, case studies, and collection of primary data from sources including the Planning Institute of Jamaica (PIOJ), Bank of Jamaica (BOJ), Ministry of Culture, Gender, Entertainment and Sport (MCGES), Jamaica Tourist Board (JTB), Jamaica Promotions (JAMPRO) among others, this study engages successes around song writing/producing, music incubation, music production in a digital landscape, and the Jamaican festival economy, specifically Rebel Salute and Reggae Sumfest.

A. Value and composition of the Jamaican music sector

Of the CARICOM territories, Jamaica’s music sector is the most advanced with a combined infrastructural terrain that supports artists through rights organisations, industry associations, and some

government support. Further, the Jamaican music sector has representation from all the actors featured in table 2 below in varying degrees.

The 2016 Tom Fleming commissioned study entitled, ‘A Business Plan for the Jamaican Cultural and Creative Industries’ indicated that the country has annual music exports of US\$80-100 million, which amounts to about 1.7 per cent of total goods and services exports. Data on the employment of persons in musical performance is largely approximated – it is a particularly informal sector. However, for data collection purposes, the Jamaican music sector is often subsumed within the larger entertainment, and increasingly, Cultural and Creative Industries (CCI) data banks. Attempts to map the entertainment sector has been streamlined in the MCGES recently launched E-Registry. Data from the registry supplied a total number of women registered at 132, alongside 443 men, with the total persons registered being 575 as at September 2017. The categories of persons registered included singers, dancers, promoters, producers, songwriters, managers, entertainment lawyers, DJs, event planners, justices of the peace, choreographers, sound engineers, among others. Some of the registrants signed up stating they belonged to several of these categories (see figure 3). There are, however, many in the sector that have not registered and therefore remain outside the data collection net. The Tom Fleming business plan approximated that 6,000 – 12,000 persons were employed in the music industry of Jamaica, with some 2,500 being musicians and 1,700 employed by sound systems. An additional 600 were studio performers estimated to be professional performers including musicians. Additionally, 24 per cent of total workers were self-employed individuals and the typical self-employed worker averaged 10.3 years of education. Further, that study, following from James (2007), estimated that the cultural and creative industries contributed 5.2 per cent to the GDP, generating revenue of US\$15 to US\$20 million annually, accounting for 3% of total employment. The James study found that in 2005, the copyright sector contributed to 4.8 per cent of GDP and accounted for some 3.03 per cent of employment. The music sector was reported to account for 6.4 per cent of copyright sector employment. It has been noted by Fleming, James and others that the copyright-based, creative sectors can become main drivers leading Jamaica’s economic transformation.

Table 2
Careers in the music industry

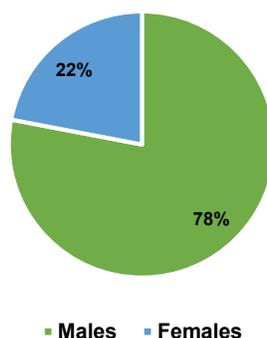
Music education	Performers and primary creators	Producers of media content	Representation and management support
Teacher	Performers	Studio	Tours and Events
Trainer			
Choir/ Music	Dancer	Music	Show promoters
Director	Singer/ vocalist	studios/labels/	Show producers
Music	Background Singer/	music	Stage managers
Supervisor	Vocalist	producers	Set designers
	Musician	Studio Director or	Choreographers
	Songwriter	Manager	Make-up artistes
	Disc jockeys	Sound and	Personal and business
	Emcees	Recording	managers
	Actor	engineers	Tour managers
	Radio/TV host		Location managers
	Poets	Albums and Digital	Road manager
	Writer	Content	Sound technician
	Artist		Tour coordinator
	Instrumental soloist	Photographers	Tour Publicist
	Performing artist:	Graphic designers	Booking agents
	Orchestra/Band	Web designers and	publicists
	member	editors	Entertainment attorneys
	Floor show band	Multimedia designers	Music publishers
		Music publisher	Book publishers
	Writers and Producers	Manufacturers	Distributors
		Internet services	Retailers
	Composer arranger	providers	Advertising executive
	Producer		Field merchandiser

Table 2 (continued)

Music education	Performers and primary creators	Producers of media content	Representation and management support
	Film scorer Jingle writer Songwriter Transcriber Copyist Conductor	Video and Film Film studios/ film producers Film and video Directors Camera operators Lighting technicians	Record Companies Director of publicity Marketing/ sales representative, Publicists Entertainment attorneys
	Rights management Organizations and collection societies Attorneys Publishers	Music director producer Production assistant Program director	Industry associations

Source: Adapted from Stanbury (2006) in CARICOM (2012).

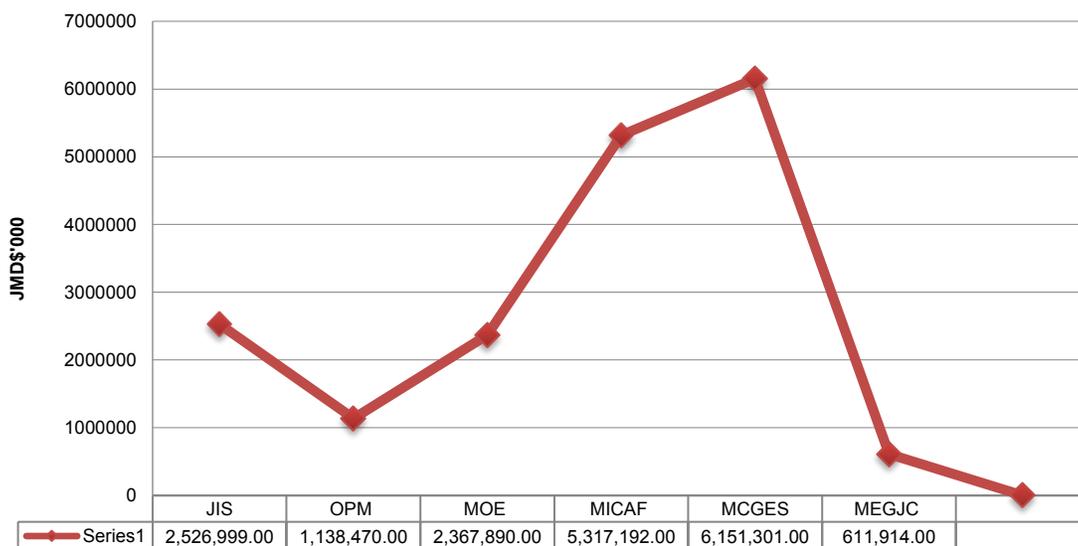
Figure 3
Percentage of males and females registered with the MCGES e-registry 2015 – present



Source: MCGES Entertainment Division, 2017.

Expenditure on the overall CCI from the government of Jamaica was first mapped based on data extracted from the Estimates of Expenditure published by the Ministry of Finance and Public Service, for the period 2010-2017. Figure 4 represents expenditure on culture by pertinent Ministries, Departments and Agencies, specifically the Ministry of Industry, Commerce, Agriculture and Fisheries (MICAFA, formerly the Ministry of Industry, Investment and Commerce), the Ministry of Culture, Gender, Entertainment and Sport (MCGES, formerly the Ministry of Youth and Culture), the Ministry of Tourism (MOT, formerly the Ministry of Tourism and Entertainment), the Ministry of Education, Youth and Information (formerly the Ministry of Education), the Jamaica Information Service and the Office of the Prime Minister. The MCGES and MICAFA lead with a combined investment of 63 per cent.

Figure 4
CCIE Government of Jamaica budget expenditure



Source: Ministry of Finance and Public Service.

Additionally, data obtained from the Statistical Institute of Jamaica (STATIN) on the Arts, Culture & Entertainment contribution to GDP Snapshot 2013-2015 was insightful. Among other things, it showed in 2015 the contribution to GDP from culture was approximately 1.74 per cent. Notably, figures collected on the CCI by STATIN are not disaggregated and there are contributions which should be accounted for in the overall assessment of the CCI within the category of Recreation and Entertainment. For example, the following are excluded from the CCI's overall accounting: Printing services, Reproduction of Recorded media, Software publishing, motion picture production, photographic activities, Sports and recreation and cultural education which are collected and reported in other areas such as Information, Information and Communication, Industry. The figures do not include IP accruals – royalty payments nor do they include GOJ spending on Entertainment, Culture and the Creative Industries in terms of salaries to culture ministry and agencies, sponsorship through JTB, the MCGES, TEF or CHASE. This highlights the need for an entire overhaul of the way in which STATIN, and more broadly the government of Jamaica moves forward to assess the CCI. There is need for creation of a Culture and Creative Industries Satellite Account, similar to the Tourism Satellite Account.

In attempting to assess the economic impact of entertainment during the period 2012 – 2016 using data from the Ministry of Culture, Gender, Entertainment and Sport, the impact of the entertainment sector was estimated based on permits issued and extensions granted for events. Table 3 shows a total impact of JA\$71,416,608,156.26 over the period with some 20,221 events on average being granted permits annually.

Data on police permits granted for entertainment events from 2012 to 2016 indicate that 101,106 event permits were granted during the period with over 27,000 temporary jobs for 3,870 production days. In addition, a snapshot of four large-scale music events in the 2010/2011 fiscal year showed that these four events generated JA\$588.93 million and temporarily employed 1,060 persons. The potential for job creation and economic growth in the entertainment sector is therefore tremendous. This is further discussed below.

Table 3
Entertainment events 2012-2016

Year	Permits ^a	Number of extensions	Estimated value
2012	18 956		
2013	24 790	300	17 124 708 890
2014	18 917	518	13 904 937 490.22
2015	19 297	348	20 272 798 718.55
2016	19 146	87	20 114 163 057.48
Total	101 106		71 416 608 156.26
Average event figure over 5 years	20 221		

Source: Ministry of Culture, Gender, Entertainment and Sport.

^a This figure represents the number of permits granted by the JCF each year in the 5 Divisions across the island: Area 1 which covers Westmoreland, Hanover, St James and Trelawny; Area 2 which covers St. Ann, St. Mary and Portland; Area 3 which covers St. Elizabeth, Manchester and Clarendon; Area 4 which covers St. Andrew Central, St. Andrew South, Kingston Eastern, Kingston Central and Kingston Western; and Area 5 which covers St. Thomas, St. Andrew North, St. Catherine South, St. Catherine North.

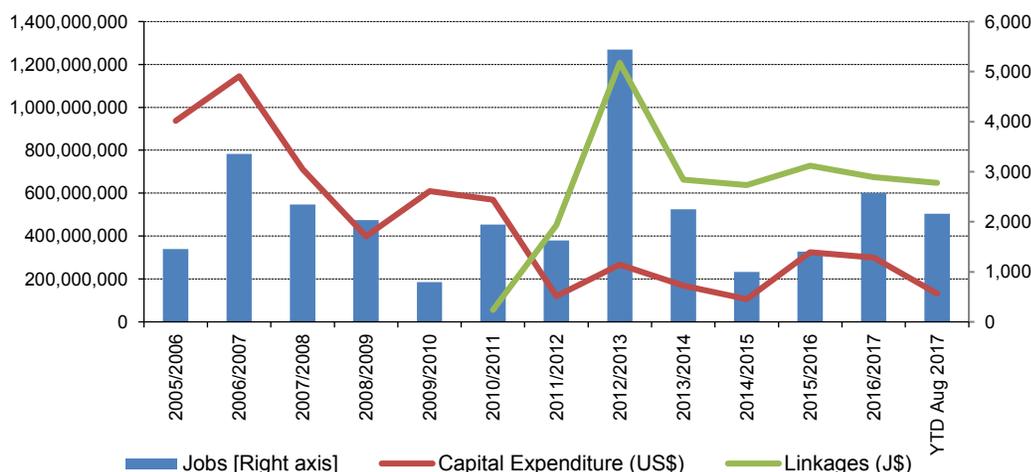
Note: Contribution per event using 2015 as baseline \$1,050,567.38.

From that extrapolate \$1.05M X 19146 events to arrive at 2016 figure.

As shown in figure 5, data from JAMPRO adds to the picture of the economic impact of the creative sector. The creative industries into which entertainment broadly and music specifically are somewhat lumped, generated J\$3.5 billion in capital expenditure while creating 21,398 jobs for persons to service the industries and JA\$3,965,496,247 billion in linkages value since 2010.

A closer look at the film sector's contribution to the creative industries CAPEX reveals that Jamaica attracted more than 1,000 film projects over the past ten years. Since 2010 specifically, data generated on the basis of 700 projects (including *music videos*, feature and short films, advertising etc.) revealed CAPEX of JA\$1,855,254,923 and linkages value of J\$ 4,416,310,869 with 16,230 job created (see table 4). Similarly, the Planning Institute of Jamaica (PIOJ) indicated that since 2010 JAMPRO had recorded over US\$16 million in business linkages between foreign projects and the local industry.

Figure 5
CCI capital expenditure and job creation (FY 2007-2017)



Source: JAMPRO.

Table 4
Capital expenditure and linkages – film

Year	Linkages	CAPEX	Jobs	Number registered
2010-2011	J\$ 55 648 563	J\$ 568 651 403	1 944	96
2011-2012	J\$ 450 814 622	J\$ 120 108 938	1 625	95
2012-2013	J\$ 1 207 947 234	J\$ 267 156 466	5 437	95
2013-2014	J\$ 662 606 185	J\$ 168 659 372	2 252	98
2014-2015	J\$ 637 615 630	J\$ 106 098 825	995	101
2015-2016	J\$ 727 426 366	J\$ 324 578 117	1 406	90
2016-2017	J\$ 674 252 269	J\$ 300 001 802	2 571	125
Totals	J\$ 4 416 310 869	J\$ 1 855 254 923	1 6230	700

Source: JAMPRO.

Coupled with the challenges within the local music sector caused by the digitization of the industry is the infrequency of local music representation on local radio stations. Radio is an important medium for the access and delivery of musical content in Jamaica, and in recent years stations have also become direct rivals of the local musical engine of sound systems and talent. In his 2012 review of Jamaica's Music Industry, Witter highlighted that established sound systems faced competition from the radio stations due to the party style of music being played by radio disc jockeys. As a result of the radio stations playing a style of music that was known to be played by sound systems, patrons were not as interested in going out to listen to a sound system. Additionally, Bowman reported in 2013 that an estimated 10 per cent of music played on Jamaican radio was music made by Jamaicans. He highlighted that this practice had resulted in an estimated 90 per cent of all monies being collected for radio play with regard to Intellectual Property flowing out of Jamaica to primarily the USA market.

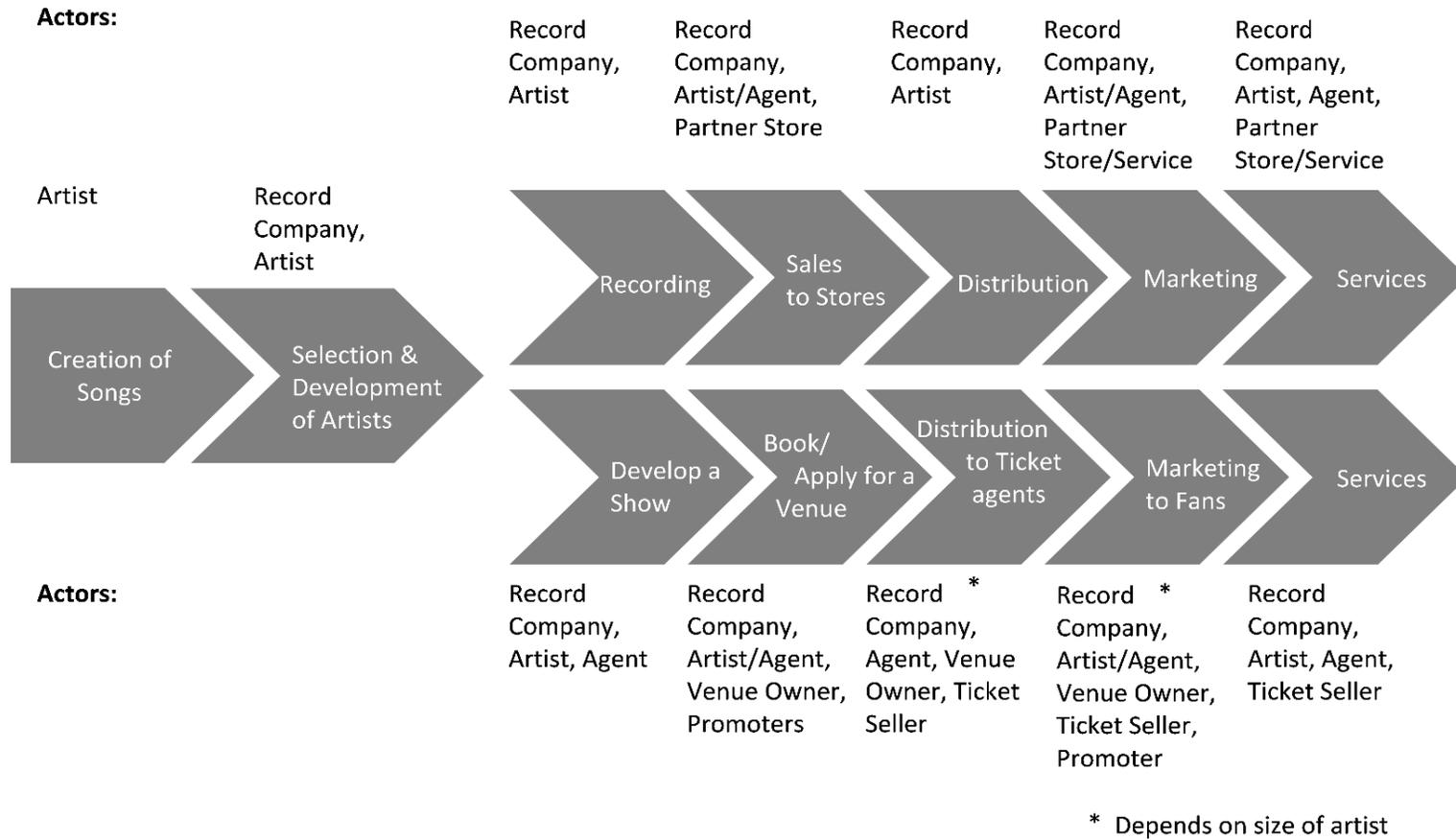
The following discussion examines major challenges along the local music industry's value chain. Despite the challenges being faced by the sector, there are many success stories that show a vibrant sector that has even greater potential than what is being reported. Additionally, this study highlights success stories and best practices that have been gleaned from these stories. Four cases were used across the music value chain – Reggae Sumfest and Rebel Salute as successful events, Nigel Staff as successful Musician, Composer, Songwriter, Alpha Boys as successful incubator, and Tuff Gong as a successful studio.

B. The music value chain in Jamaica

A value chain is viewed 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 value chain of the Jamaican music industry consists of an initial creative idea, which is usually combined with other inputs to produce a cultural good or service. The figure below illustrates the process used by the local music artist toward generating financial value for their recorded and performed works. Within the recorded music sub-sector value chain, the related services, such as music publishing (composers and lyrics), recording studios, Collective Rights Management (royalties and license fees), radio stations and TV channels are primarily responsible for the generation of revenue for the artist. However, within the performed/live music sub-sector value chain, the related services, such as performance management, booking, support and technical activities, as well as producing live events (including venues), are the primary sources for the revenue creation.

According to Dean McKellar, Board Member, Jamaica Composers, Authors and Publishers (JACAP) "songwriters are the first link in the music industry value chain: the composition. The song is primary product and raw material in the music industry." Consistent with McKellar's assertion, Hanne Russ, Jean-Pierre Kuilboer and Noushin Ashrafi in their 2014 paper entitled the 'Business Intelligence in the Music Industry Value Chain: Ensuring Sustainability in a Turbulent Business Environment' indicated that "there would not be a music industry, if it were not for the creation of songs." While the development of the song is widely viewed as the start of the music value chain, the selection and development of artists is a crucial next step in the value chain. Once the artist is paired with the song, the recording of the song is the next step and essential for the business of a record label and the artist's career development. After the recording of the song come the sales, distribution, marketing, and services, and it is important to note that these activities remain costly (Wunsch-Vincent, Vickery, & Graham, 2005; Barkin, 2011).

Diagram 1
The music value chain

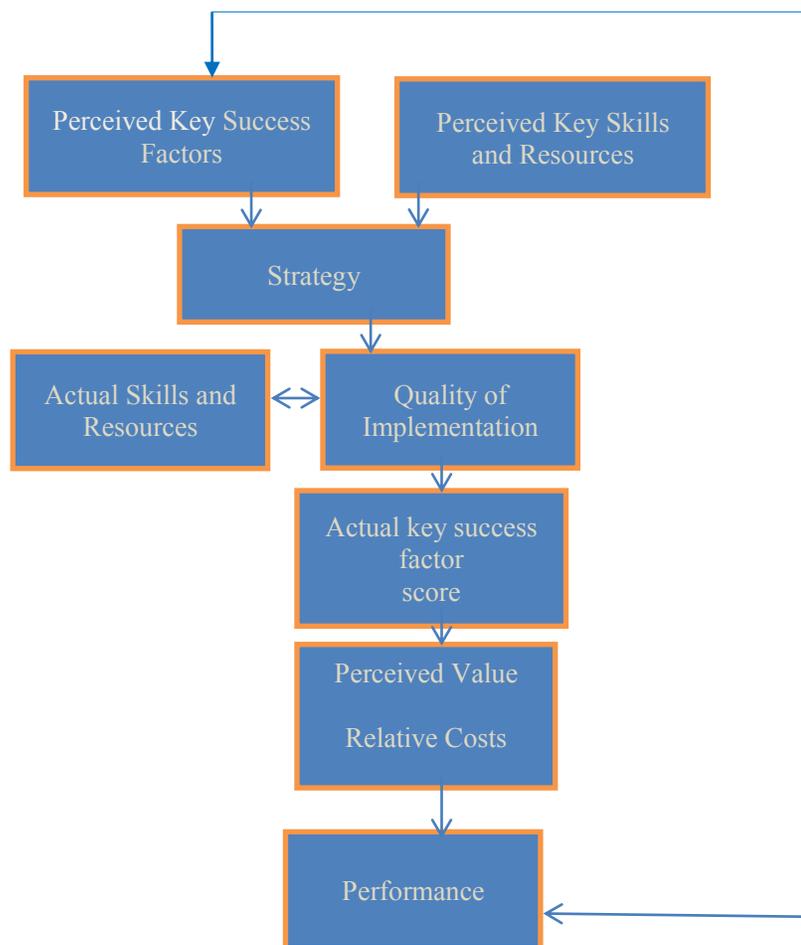


Source: Business Intelligence in the Music Industry Value Chain: Ensuring Sustainability in a Turbulent Business Environment, 2014.

C. Methodology and framework for case studies

This study analyses case studies of the music and film sectors in Jamaica using a critical success factors or key success factors approach. Cases were selected on a convenience basis given the difficulties in accessing information from key players in the sectors and the rapid appraisal required for the study in a short time frame. Along the value chain for music cases represent key components of an underexposed sector. According to (Rockart, 1979 and Rockart and Bullen, 1981), critical success factors are “the few key areas where things must go right for the business to flourish”. In effect, they are the limited number of areas where satisfactory results will guarantee the successful competitive or aesthetic performance and other goals of the firm are achieved. The critical success factor framework is grounded in the logic that in the same way that there are key or critical binding constraints that hinder success, there are critical or key driving factors behind the success of a firm or venture.

Diagram 2
A generic view of key success factors and competitive advantage



Source: Author's diagram.

D. Case studies along the music value chain in Jamaica

Despite the challenges facing the music sector, including accounting for its growth and impact, case studies provided key insights about the music value chain. Professionalisation of the sector, capacity building, and alignment with global industry standards continue to be areas of concern. For example, McKellar noted that:

“...because of late registration on the part of some of the artists and songwriters and their management team not understanding the music rights landscape we find that by the time these artists eventually become members of copyrights bodies late in the day they have missed out on royalties because early registration is the key to earning royalties.”

As such, in his speculation “there is a significant amount of royalties; unquantifiable, at the moment that hasn’t accrued to Jamaica.” In an effort to address the knowledge and skills gap that exists within the local music industry which has led to high unclaimed royalties by songwriters, the Government of Jamaica (GoJ) and various stakeholder groups such as the Jamaica Copyright Licensing Agency (JAMCOPY), Jamaica Intellectual Property Office (JIPO), Jamaica Association of Composers Authors and Publishers Limited (JACAP) and Jamaica Music Society (JAMMS) have been systematically hosting awareness and skills building sessions.

The most recent initiative by local music stakeholders towards shrinking the knowledge and skills gaps within the music industry took the form of a three day Fundamentals of the Business of Music series including workshops around ‘Managing and Negotiating Contracts’ and ‘Accessing International Markets’ (August – October 2017). There were fifty-one females and sixty-seven males in attendance at the workshops. The workshop series was executed through a mixed method approach reflected in the use of presentations from key local and international experts within the music industry, role playing from participants, open mike question and answer sessions and interactive case studies. The mixed method approach of the workshop series allowed for the free exchange of experiences which resulted in a more comprehensive learning and teaching experience.

The Caribbean Development Bank (CDB), Association of Caribbean Copyright Societies (ACCS), JACAP and the MCGES, partnered to host the workshop series of the new and emerging Negotiating and Managing Contracts in the Music Industry. As cultural development specialist the CDB, JACAP, ACCS and MCGES readily understood the need for such workshops. However, the partnership among these agencies also came out of the limited funding available by any one agency to sufficiently absorb the financial cost in hosting large scale technical capacity development sessions for local music practitioners. Therefore, the partnership between the CDB, JACAP, ACCS and MCGES signals a best practice which has been hampered by the lack of available funding for capacity building. Consistent upgrade of the skills bank within any creative sector in a changing world economy is critical for maintaining viability of the sector.

Additionally, legislative amendments have been actioned to provide greater protection for copyright owners and collection of royalties by the relevant agencies. In 2016 the Patents and Designs Bills were reviewed by Jamaica Intellectual Property Office (JIPO) and subsequently presented to the Ministry of Industry, Commerce, Agriculture and Fisheries (MICAFA) for Cabinet submission. Workshops on activities relating to the Bills were held during 2016, under the African Caribbean and Pacific Countries European Union Technical Barriers to Trade Programme (ACP-EU-TBT). Furthermore, the Protection of Geographical Indications (Amendment) Bill was reviewed by JIPO, MICAFA and the Attorney General’s Chambers. The revision included provisions for the proposed protection of plant variety legislation which has been submitted to the Office of Parliament Council. There were also Legislative amendments in intellectual property, as well as other initiatives with implications for the copyright sector. By 2016, JIPO recommended four organizations to the Ministry to be named Authorised Bodies empowered to make and provide accessible copies of copyright works (without the copyright owners’ permission) to eligible beneficiaries.

As shown in table 5, in 2016 JACAP disbursed USD\$56.7 million in royalties that were collected on behalf of its members, this represented an increase of 45 per cent compared with 2015. The increased collection of royalties reflects two major developments within the local music sector, both of which were facilitated through the consistent effort of the Government of Jamaica and stakeholders:

- Increased awareness, compliance and skill on behalf of rights holders;
- Greater collection capabilities of collection agencies.

Table 5
Payment of royalties disbursed by JACAP, 2012-2016
(Jamaican dollars, millions)

	2012	2013	2014	2015	2016
Total monies disbursed by JACAP	12.6	13.6	12.7	39	56.7
Incoming royalties to JACAP – overseas net	7.3	13.4	6.7	14.1	21.5

Source: JACAP.

The gross income received by the Jamaica Music Society (JAMMS) in 2016 totalled USD \$63 million, an increase of 18.3 per cent relative to 2015. Income from broadcasting and cable services was \$32.1 million compared with \$22.4 million in 2015. A total of \$25.6 million was collected in permit fees from entities which used music protected by JAMMS licenses, a decline of 0.7 per cent relative to 2015. This reduction stemmed from lower collections by JAMMS from six of the eight categories of music users:

- Restaurants, bars, cafes – 1.8 per cent
- Events – 69.9 per cent
- Financial institutions – 2.1 per cent
- Supermarkets and speciality stores – 2.9 per cent
- Hotels, motels – 15.9 per cent
- Shopping malls, stores and gyms – 3.1 per cent
- Nightclubs – 4.3 per cent

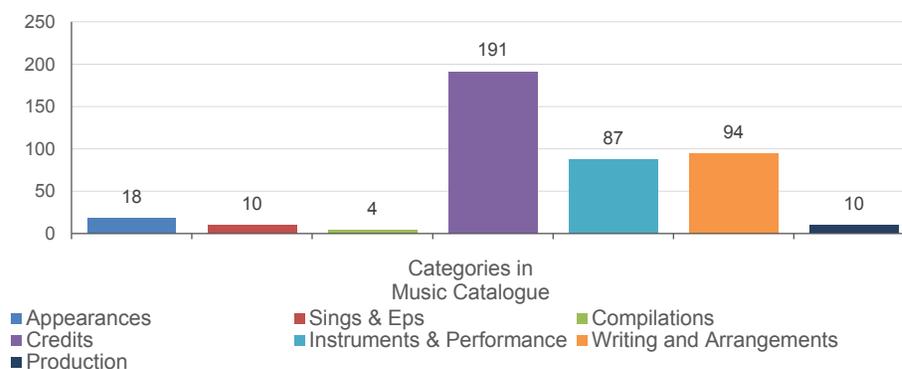
Additionally, the total royalty pay-outs by JAMMS to its membership in 2016 increased to \$28.7 million from \$20.1 million in 2015. Evon Mullings, an economist and general manager at JAMMS stated that "the steady increase in collection of airplay and public performance royalty from the market, is attributable to a number of factors, but mainly due to one: a continued consolidation of our operations into the local market, through strategic licensing activities which results in an increasing number of music users being brought into compliance, and two: given our relatively recent commencement of operations, we are in fact still breaking into a very large market and so it will take some time before we have full concentration in the market." While there has been an increase in the collection and disbursement of copyright revenues there still exists major challenges within the local music industry. Firstly, a number of musicians are still unaware of best practices in registering their music with the necessary national copyright collection agencies. Additionally, Lydia Rose; JACAP's General Manager, stated that a "there is a passive and an active resistance from many of the players (users of copy written materials) as far as compliance with the copyright law is concerned" which contributes to the difficulties in managing and collecting copyright revenues.

1. Songwriters and copyrights collection case study

The work of local stakeholders and the Government of Jamaica towards increasing the protection of songwriters and by extension copywriter holders within the music industry through capacity building has resulted in individual success stories such as Nigel Staff.

Nigel Staff has become successful not only due to the quality of his musical product, but also because of his understanding of the business of music. Staff is a highly sought-after Jamaican producer/songwriter/arranger on the reggae/dancehall music scene today. He boasts a catalogue over 250 songs, spanning the biggest names in reggae and dancehall, including Sean Paul, Beenie Man, Shaggy, Elephant Man, T.O.K., Sizzla, Vybz Kartel, Capleton, Bounty Killa & Voicemail among others. Staff's credits include cuts on the Grammy-nominated albums *The Trinity* (2005), *Imperial Blaze* (2009) and *Tomahawk Technique* (2012). *The Trinity* (2005) by Sean Paul remains one of the most successful albums in the genre's history, selling over 4 million copies worldwide. Nigel's more notable hits include "So Fine" by Sean Paul (which has sold over 300,000 digital downloads just in the USA) and T.O.K.'s biggest hit "Footprints" (which crossed over into Top 20 on the USA Billboard Hot R&B/Hip Hop Chart and US Rap Singles Chart). Nigel Staff's success comes from his diligence in registering his works which have resulted in over 191 credits and 94 writings and arrangements. Figure 6 shows a graphic representation of the income generating activities in which Staff engaged while ensuring that his musical works were properly registered. Nigel's success does not stand alone within the local musical landscape.

Figure 6
Selected achievements of Nigel Staff's music career



Source: Author compilation.

E. Digitization, distribution and the changing music studio

The wave of new technology and the digitization of music internationally have affected the professional structure of the local music industry. For example, artists have become producers due to the rise of the home studio model born out of the accessibility and ease of the operations of new technology. This has given the local artists more control over their intellectual property and generated more revenue for the artist. According to Dean McKellar "the typical artist within the music industry takes a 'jack of all trades master of none approach.' Somebody needs to introduce to them Adam Smith's concept of division of labour, to increase efficiency and overall output."

Synonymous with the rise in the home studios is the reduced use of commercial studios. The commercial studio has been replaced with a laptop equipped with the latest software. As such the commercial studios are forced to reduce the number of days they are open, rent out their equipment and their space in an effort remain viable. Frankie Campbell of the long-standing band Fab 5 has stated that the digital wave has caused bands not to continue as success stories. With reference to the Fab 5 band

Frankie stated that to remain successful they had to diversify their operations: “we do theatre music, pantomime, plays, commercials, gospel music, we have our own studio.” He also noted that “bands are getting about US\$1,200 per week if they are lucky and they are only working a few months a year. The demand for local bands has been reduced by hotels operators who hire Cuban bands, which comprise 3-4 persons and work three days per week and for much less than a Jamaican band. As a result, many Jamaican bands are now marginalised in the music business.

The local music industry has been seeing a rise in the number of independent selectors who travel with a digital collection of music to play at an event. The emergence of the independent selector digital is in direct competition to the sound system and band structures that employed more individuals throughout the local music industry. The new technology allows selectors to travel with a smaller entourage and less equipment and results in reduced cost for the promoters of events. This development has put in jeopardy the *major success story* emerging from the Jamaican music sector which is that of studios that have been at the heart of the technological innovations, the shepherding of talented artists and the resulting production of an extensive Jamaican music catalogue, arguably unmatched in per capita terms globally. Examples of this success today, building on studios of yesteryear such as Studio One, include Anchor Records owned by Gussie Clarke which is a formidable apparatus for the recording and production of music, music publishing, management of artistes, CD printing, among other services. Local music publishing has shifted from the manufacturing of vinyl disks, tapes and CD to the production of music for film, commercial advertisements, video games and videos. While the publishing sub-sector of the music industry has shifted too, many publishing companies are not actively trying to place their music in movies, commercials and video games.

With the changing music landscape has also come a significant reduction in major label investment in artist development, and as such fewer opportunities for new artists to build sustainable careers exist at the level of major recording labels. The lack of major label investment in artist development has resulted in what Gussie Clarke calls “forced ripe fruit” artists. These are artists who have not matured to the point of understanding the business of music and as such act in very unprofessional ways when conducting business. However, emerging Jamaican artists such as Chronixx, Jah9, Protoje, Kabaka Pyramid within what is dubbed the ‘Reggae Revival’ movement can be seen as exceptions as the model for success was hinged around entrenchment in a local music market, through live events including local tours for stage shows, as well as building online following via YouTube and SoundCloud. They have all emerged in this time of challenge without the support of major labels by building support at / from home and this has resulted in a significant boost to their local and international appeal. While some male artists have been able to engineer their success without the support of a major label, female artists find it more difficult to do so. The challenges for women in achieving success within the local music sector are arguably a direct result of the patriarchal structure of the industry. In a March 18, 2016 Gleaner article titled ‘D’Angel highlights gender bias in music’ and printed in the local (Jamaican) Star newspaper, D’Angel stated that “as a female in this industry (music), you have to work harder each day. As women, we have to demand our respect from the men and, surprisingly, even the other women in the industry.”

Dr. Dennis Howard, General Manager Radio Services at RJRGLEANER Communications Group; Augustus “Gussie” Clarke; music producer and owner of Anchor Studios; and Michael “Ibo” Cooper, chairman of the Jamaica Reggae Industry Association, recommended that in the wake of the greater digitization of the local and global industries, Jamaican musical practitioners need to acquaint themselves with the things that made the older members of the industry very successful. Activities such as reusing lyrics, ‘riddims’ (digital rhythms) and text in the creation of ‘versions’ have resulted in success for some artists over the last 20 years but mostly within a local market. Additionally, like the older local practitioners it was suggested that the younger practitioners embrace the geo-spatiality dynamic around the black Atlantic travelling experience and by so doing cross- fertilise Jamaican and African music genres both in Africa and the Diaspora to create unique sounds. Therefore, Ibo Cooper recommended that the local music industry needed to have stronger emphasis on the reverberation of different styles and cultures within the development of the music.

Gussie Clarke echoed other interviewees who stated that to counteract the negative effects of musical digitization and the Me-factor that have taken hold in the local musical sector there was need for critical input in the collective creative space. Gussie stated that:

“the studio is the space that cannot be compromised in the creative process, in terms of collective writing, vibe-ing and apprenticeship. One of the things that made us rich as a people and as a culture is our collaborative effort. As such, the biggest destruction to Jamaican music is what I call the ME factor; A me write it, a me a di artist, my studio, a me mix it, and them take on 10 different hats.”

Ibo Cooper suggested the need for a structured regional response in addressing the negative impacts of the digitization of the Jamaican music industry. He offered first that at the national level there was need for *musical incubators*, comprising the development of formal primary to tertiary educational systems for the development of talent. Additionally, Cooper suggested that marketing and sales mechanisms need to be locally controlled. In support of the incubator concept for artists Dean McKellar added that “the young artists need to go through a finishing school for artist development. There needs to be an incubation or apprenticeship of the artists before exposing them to the world. However, artist development is not widely practiced by the major labels because they are owned by conglomerates that are pushing them to produce at a faster rate with higher returns at reduced costs. He offered that the casualty in this cost cutting exercise is artist development. Major labels now see artist development as an expense and not as an investment.” It was noted that the educational incubator must be to support “professional, psychological, and technical development and exposure to art generally and specifically to the field of specialization.” (Ibo Cooper, interview, 2017). Additionally, “the educational component should not be seen as instructing the artist about what to do but instead it must look at the talent and develop it.” (Ibo Cooper, interview, 2017)

According to Dennis Howard, the technological contribution of the Jamaican musical industry has been muted. “We (Jamaican musical practitioners) have always been nimble when it comes to technology. Sly Dunbar was the first musician to use a Simons drum, which was an electronic drum set. The first digital studio was New Name Music managed by Castro Brown. We have always been on the cusp of technology; when MIDI was the thing we jumped on it, when keyboards became hot a DX7 was in every studio.” (Dennis Howard, interview with author, May 2017)

Howard stated that “reggae is not homogenous, reggae is one of the most versatile and enigmatic music forces in the world because it is so simple. Simplicity gives you the platform for the mushrooming, which happens in the mind and this is where the young artist need to go back to.” As such, while the digitization of the global music industry has been having an adverse effect on Jamaica’s local music industry Rob Bowman offered that there is hope for the industry. The hope is today reflected by a number of millennial artists, among them Chronixx, Jah9, Protoje and Kabaka Pyramid who have focussed on producing good quality, in demand music and used social media; notably YouTube, to launch their careers and revive the use of live bands at events locally. Furthermore, it is expressed that the wave of digitization has had an encouraging impact on the performance arts of local musical artists and has resulted in a plethora of new and freely accessible music sources from the country. Consequently, the reduction of revenue through sales has driven artists toward more extensive touring – for which demand has increased with results being new aggressive touring schedules for artists and equally aggressive merchandising campaigns. The teams that manage major local artists such as Chronixx, Sean Paul and Vybz Kartel no longer refer to merchandising as the endorsement of products/services, nor is it only synonymous with the sale of t-shirts. Merchandising within the local music sector has moved to the sale of a lifestyle; artists using their unique value proposition allowing their fans access to the life by way of special appearances, one-on-one conversations all at a cost, which result in a more diversified revenue stream for the artists and their management teams.

1. Developing artists within the local music sector - Alpha Boys Institute

Gussie Clarke and others believe that the negative effects of musical digitization and the ‘Me-factor’ have to be addressed through an apprenticeship and incubation process. The musical development

programme being offered at the Alpha Institute represents one of the island's best examples of apprenticeship and artist development via a structured school based curriculum. Chris Blackwell in an interview with Heather Augustyn⁵ offered that “there are only three countries whose popular music is played all over the world—American music, British music, and Jamaican music. We owe maximum respect and thanks to the Alpha Boys’ School for its contribution to this fact.”

The Alpha Institute, (formerly Alpha Boys School) was founded in 1880 and born of the vision of Jamaican philanthropist, Jessie Ripoll. Her dream was to minister to the hopes and aspirations of young Jamaicans at the bottom of the social ladder. As such, Alpha Institute has long been a beacon of light and hope for the Jamaican society as part of the Mercy Sisters’ focus on education, youth and the vulnerable in society. The Institute is best known for its music programme. Past Alpha students such as Joe Harriott (jazz), Don Drummond (ska), Johnnie ‘Dizzy’ Moore (ska), Winston Francis (ska soul singer), Leroy Smart (reggae) and 1997 Grammy nominee Winston Foster (dancehall), to name just a few, are viewed worldwide as pioneers in their genre.

The Alpha Music Programme offers performance and technology training with an emphasis on the theory/reading and practise of music. Music students learn to read and perform music individually as well as work as a member of a performance group. The performance programme is based on a unison/group method. Music students sit for the Associated Boards of the Royal School of Music theory and practical exams. The school’s music technology training includes audio engineering (Pro Tools, Adobe Audition, Reason), radio broadcasting and disc jockey techniques. Additionally, the Institute operates a 24/7 streaming radio station with mobile applications for Android, iOS and Windows operating systems. Featuring its one-of-a-kind ‘all Alpha, all the time’ format, every song on Alpha Boys School Radio (ABSR) includes at least one past or current student. The school’s radio station adds to the development of the young musicians by ensuring that they are acquainted with the income revenues and streaming platforms available for their own musical works. By introducing the boys at the Institute to the live streaming music radio from an early age the operators of the school’s music programme seek to remove the mysticism that surrounds the use of digital platforms for the distribution and merchandising of one’s musical works.

Having been identified as an area of weakness for the Jamaican music sector in consecutive State of the Music Symposia staged by the UWI in collaboration with JAMPRO and JARIA, music education and apprenticeship are systematically addressed in the operation and mandate of the Institute, a model which can be used for a national focus on music education.

2. Tuff Gong – a successful studio in a digitized music marketplace

The digitization of the local music industry has negatively affected growth of Jamaican music studios. The post-modern musician uses an application on his laptop, phone and/or tablet to create good quality music. The advent of mobile applications, laptop, phone and/or tablet to create quality sounding music has therefore caused local commercial music studios to close, diversify their operations or downsize services being offered to clients. However, instead of downsizing one local studio, Tuff Gong International, decided to increase its operations to meet the digital wave head on.

Tuff Gong International was founded by Jamaican Superstar Bob Marley in 1965 and lies atop the Marley music empire which is itself a competitive advantage based on the success of Marley and sustained efforts by legateses after his death to grow the business in tandem with shifts in the global industry. Marley, who was affectionately called “The Gong”, embodied the ‘tuff’ you had to be to survive in the music business in Jamaica, and remains one of the most popular music celebrities in death. In an effort to better capitalize on the unique value proposition of the Marley name the studio decided to design its own merchandising and ensured that copyrights were in place to govern the use and

⁵ See Augustyn, Heather, 2017. “Alpha Boys’ School: Cradle of Jamaican Music” <http://skabook.com/foundationska/2017/11/alpha-boys-school-cradle-of-jamaican-music-by-heather-augustyn-and-adam-reeves-is-now-available/> (accessed November 2017)

distribution of items that bore the name Marley. As such, the recording studio morphed into an enterprise that included brands; the Bob Marley Museum, The Bob Marley Theatre, The Queen of Sheba Restaurant and Things from Africa Boutique. The Group increased its merchandising efforts by also including Marley Coffee; an international gourmet coffee company founded by Rohan Marley, sourcing beans from around the world, as far as Ethiopia, Central America and within Jamaica; and the House of Marley – Headset; Marley In-Ear Headphones, On-Ear Headphones, Over-Ear Headphones and Earbuds, designed for high-quality comfort and best-in-class sound.

The studio itself was eventually merchandized as artists, musicians, producers and tourists travel from all over the world to see and use it. The studio is said to have a vibe conducive to creativity, and this may be because the mixing board in the studio is the same one used by Bob on all of his records. Additionally, the mastering room gave birth to such songs as “No Woman, Nuh Cry”, “Trenchtown Rock”, “Stir It Up”, “Concrete Jungle”, “Redemption Song”, “Buffalo Soldier” and “Could You Be Love”, just to name a few. Since its inception, Bob Marley and Tuff Gong International have sold millions of records, and continue to do so.

In the wake of the constant shifts within the music sector and the difficulties being faced by local artists to access markets, the Tuff Gong studio made the leap to becoming a full one stop recording agency. The studio therefore began to offer:

- Full-Service Recording Studio
- Vinyl Pressing
- CD Duplication
- CD and Vinyl Mastering
- Digital and Physical Music Distribution

Tuff Gong has also become the exclusive licensed representative of two of the largest international labels in the world; Universal Music Group and Warner Music Group. Through these licenses they distribute the top selling artists in every genre from pop and hip hop to gospel and EDM. When it comes to reggae the list runs from Marley to Sean Paul. Additionally, the studio has one of the best vintage vinyl LP catalogues in the world.

The Tuff Gong studio has shown that the physical space called the studio needs not be done away with in light of the technological shifts in music. As such, what started out as a studio is now a recording studio, mastering room, stamper room, pressing plant, cassette plant, digital music distributor, wholesale record shop, booking agency, as well as offices for Rita Marley Music and Ghetto Youths International.

3. Stage shows

The street dance, stage show or outdoor music event is a vital component of the local music ecosystem. These outdoor events allow for the:

- Distribution of music
- Mechanizing of the artists
- Development of community based business

Despite the important nature of outdoor music shows the PIOJ’s Economic and Social Survey Jamaica (ESSJ) indicated that the municipalities/local authorities in all fourteen parishes issued 23,105 amusement licences in 2016 relative to 26,687 issued in 2015; as shown in table 6. The data from the PIOJ indicated that most parishes issued fewer permits, with eight local authorities seeing a corresponding decline in revenue. The worst affected was the Kingston and St Andrew Corporation, which saw its revenue decline by USD\$12 million. Additionally, the 2016 ESSJ revealed that the local authorities earned USD\$107.3 million in revenue from outdoor musical licences in 2016, as shown in figure 7. However, this was a decline of USD\$16.6 million from the \$123.9 million generated in 2015.

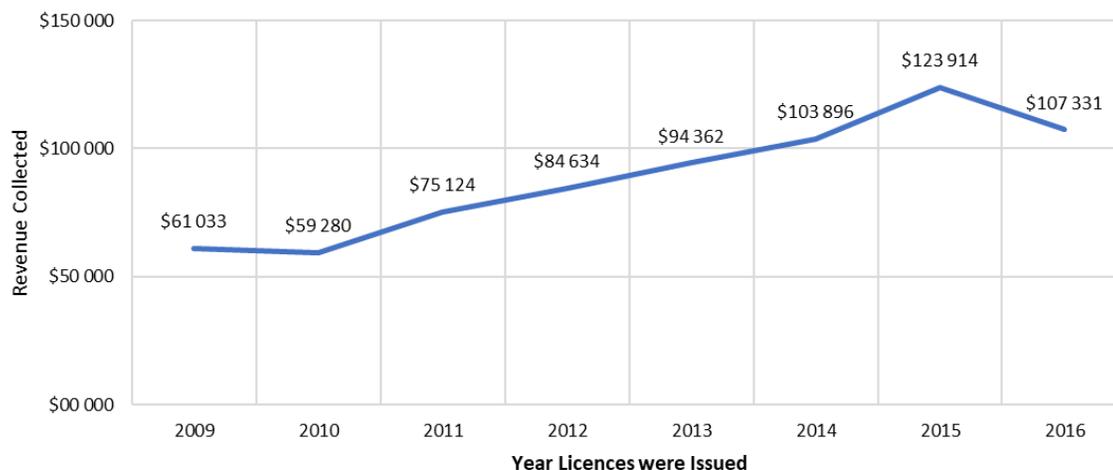
The first explanation for the decline in licenses issued for the hosting of outdoor musical events is the rise in crime in the communities in which these events are being held. Those parishes most affected by a reduced number of licenses such as Kingston and St Andrew, St Thomas and St James, tended to also reflect an increase in crime and violent activities. Figure 8 gives a parish level reflection of the revenues generated from permits procured for the hosting of live events. Not surprisingly figure 8 shows that the twin parish of Kingston and St. Andrew consistently generated higher revenues when compared to the other parishes, for the period 2009 – 2016.

It is important to note that the events that are issued with public licences, facilitate revenues for:

- Central and local government via the licences issued as shown in figures 7 and 8;
- The event operators/promoters and their staff;
- 3rd party linkage industries or sectors. The practitioners in these linkages industries use the events to promote and sale their products;
- Service providers who are the recipient of the capital expenditure (CAPEX); money spent by event promoters that goes into acquiring or maintaining fixed assets, such as land, buildings, and equipment.

Between June 2016 to December 2016, the MCGES reported that 2,727 jobs were created from the hosting of the parish licensed events. In the following year 2017, from January 2017 to September 2017, the Ministry of Culture, Gender, Entertainment and Sport reported that a total number of 4,156 Jamaicans were temporarily hired by the operators/promoters of parish licensed events. The jobs created by these events further add to the economic development of the communities and parishes that they are hosted in, and ultimately the economic viability of the nation. The total linkage value generated from June 2016 to December 2016 as reported by the Ministry stood at USD\$267,236,000. On the other hand, the Ministry reported a significant increase in the total linkage value generated for the period January 2017 to September 2017, which stood at USD \$310,361,000.

Figure 7
Annual total revenue collected from issued licences



Source: PIOJ Economic and Social Surveys Jamaica (ESSJ) from 2009 – 2016.

Figure 8
Parish revenue collected from issued licences



Source: PIOJ Economic and Social Surveys Jamaica (ESSJ) from 2009 – 2016.

Table 6
Number of licences issued at Parish level

Parishes	2009	2010	2011	2012	2013	2014	2015	2016
Clarendon	1 734	1 536	1 592	2 134	3 683	2 915	3 575	3 224
KSAC	4 499	2 229	5 817	6 487	6 720	7 020	9 413	7 040
Manchester	1 260	919	432	152	796	534	798	1 007
Saint Elizabeth	1 606	2 001	2279	2 625	2 547	2 226	2 302	2 228
Hanover	337	247	222	109	355	689	505	650
Saint Catherine	1 706	845	1 336	2 158	1 952	1 953	1 254	1 378
Saint Thomas	1 139	1 430	1 530	1 419	1 326	1 756	2 005	1 411
Westmoreland	1 310	1 158	454	860	1 034	866	685	501
Trelawny	710	588	741	836	733	1 500	904	809
Portland	249	340	548	439	861	1 554	918	978
Saint Ann	655	581	645	893	793	825	800	1 081
Saint Mary	1 036	1 059	1 414	1 712	793	1 072	2 158	1 582
Saint James	900	795	778	624	899	1 071	920	609
Portland	472	278	331	396	437	372	450	607
Total	17 613	1 4006	1 8119	2 0844	22 929	24 353	26 687	23 105

Source: PIOJ Economic and Social Surveys Jamaica (ESSJ) from 2009 – 2016.

Apart from the rise in crime and violence the lack of financial support is the other explanation that resulted in fewer licenses being issued for outdoor music events. Finance is an important binding constraint for the music industries across the world, particularly since the emergence of digitization of the music industries. The 2016 ESSJ reported that at the end of 2016 the outstanding stock of Loans and Advances to the Entertainment industry at Commercial Banks and institutions licensed under the Financial Institutions Act (FIA), was USD \$2,281.4 million. This was an increase of USD \$626.7 million compared with the end of December 2015. This reflected an increase of 39.3 per cent to USD \$2,241.9 million in disbursements by Commercial Banks as disbursements by FIA institutions declined by 6.1 per cent to \$39.5 million. The Loans and Advances received by the entertainment industry were the highest in 2016 when compared to corresponding period from 2012 to 2015. Loans and Advances to the Entertainment industry are primarily important for the advancement of the music sector because the majority of those within the industry are from the underclass that do not have access to other forms of finance such as funding by venture capital and equity finance for effectively building careers. Without the means to access loan facilities, artists, promoters, and various entrepreneurs within the music value chain do not stand a chance of creating a sustainable sector.

While there has been an increase in the number of loans being available to, and accessed by, entertainment practitioners, the concern is that the information presented in the ESSJ represents the entire entertainment industry and not just the outdoor music hosts. As such, more needs to be done to ensure that timely and actionable data is available. However, even against the background of increased loans being made available to entertainers, music industry practitioners and outdoor music hosts still complain about the difficulty in accessing loans from established banking institutions due to the fact that such institutions do not see the outputs of musicians as collateral upon which to secure loans. In this regard, Chaitoo (2013) noted that the banking system is preoccupied with lending to brick and mortar businesses or physical plants and remains averse to more risky service activities. An important issue is the lack of flexibility in the type of collateral that is accepted to secure loans. Caribbean banks are often reluctant to use intangibles such as moveable assets, the value of the intellectual property of the business

and outstanding receivables to secure loans. This often puts creative sector entrepreneurs who might not have fixed assets at a disadvantage in securing loan finance, which is the overwhelming bulk of finance available in the region.

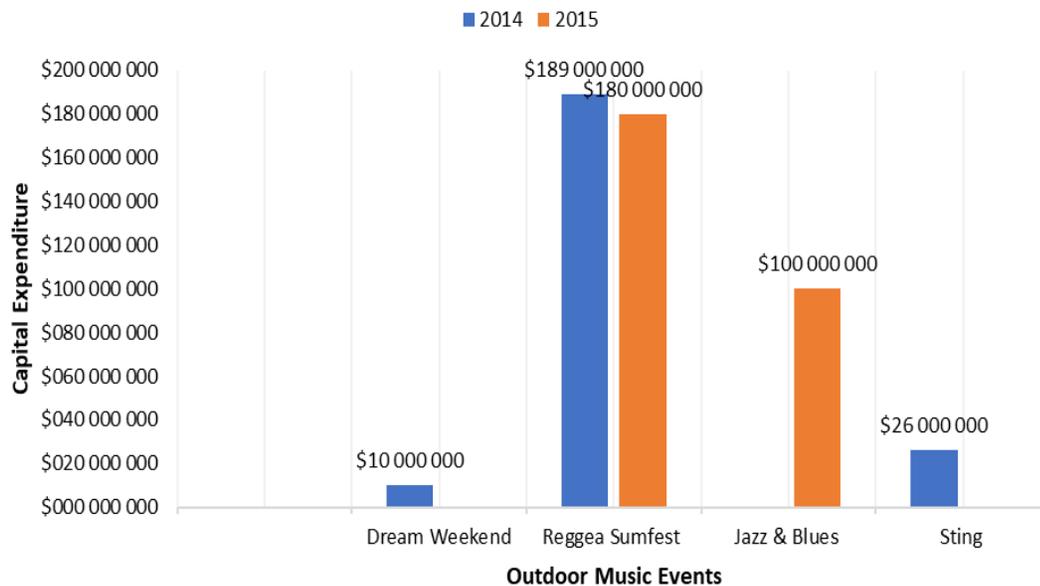
4. Reggae Sumfest – a stage show case study

Reggae Sumfest was started in 1993 by Robert Russell and Johnny Gourzong, along with a dedicated group of Montego Bay business and cultural interests. The mega event has showcased some of the biggest stars in music, including Rihanna, Kanye West, Usher, Christopher Brown, Alicia Keys, Nicky Minaj, 50 Cent, Lionel Richie, and numerous other international stars. Faithfully, it also presented the greatest and most authentic line-ups of the Jamaican and International stars of reggae and dancehall such as Damian “Junior Gong” Marley, Stephen Marley, Ziggy Marley, Dennis Brown, Toots & The Maytals, Beres Hammond, Burning Spear, The Mighty Diamonds, Sugar Minott, Gregory Issacs, Frankie Paul, Jimmy Cliff, Freddie McGregor, Tarrus Riley, Barrington Levy, Chronixx, Buju Banton, Luciano, Shaggy, Shabba Ranks, Vybz Kartel, Bounty Killer, Ninja Man, Elephant man, Ce’Cile, Etana, Beenie Man, Capleton, Lady Saw, Spice, Popcaan, Tommy Lee Sparta, and virtually every artist of merit in the world of Jamaican popular music. Besides being one of the longest running music festival in Jamaica and the world, Reggae Sumfest dubs itself as the most authentic reggae and dancehall festival in the world. Based on international festival data collected over the period 2010 – 2017 the longest running reggae festival is not Jamaican and neither is Jamaica’s Reggae Sumfest the largest such festival in the world.

The present owner of Sumfest is DownSound Entertainment, headed by Jamaican based music and media entrepreneur, Josef Bogdanovich. In an email correspondence, dated 20 April 2017, with this author the Sumfest owner stated that “To run a festival to [his] standard that can compete with international standard costs over \$150M to produce.” Notwithstanding the tremendous cost of hosting Sumfest, the event has had a strong showing each year, which is reflected by the event’s capital expenditure. Capital expenditure (CAPEX) represents the funds used by a company to acquire or upgrade physical assets such as property, industrial buildings or equipment. It is often used to undertake new projects or investments by the firm. This type of outlay is also made by companies to maintain or increase the scope of their operations. These expenditures can include everything from repairing a roof of a building, to purchasing a piece of equipment. Figure 9 shows the CAPEX of four of Jamaica’s largest outdoor licensed music events, of which Sumfest is one, for the 2014 and 2015 years. The aggregate contribution of these licensed events to the national gross domestic product stood at an estimated J\$ ½ billion (USD\$ 3,966,302). It is important to note that the 2014 CAPEX for the Reggae Sumfest event was J\$9 million (USD\$ 71,393) more than its 2015 CAPEX. The 2015 Reggae Sumfest CAPEX reduction is reflective of the larger reduction of the CAPEX being generated by the cultural and creative industries and specifically the music sector due to limited number of music festivals/shows/dances being granted permits and the added difficulty in accessing funding for the hosting of these events.

Joe Bogdanovich indicated that the factors which are critical to the success of the Sumfest event include the dedication of sponsors, artists, staff and patrons who have supported the festival over the years. There are hundreds of persons employed by Sumfest including vendors, technical producers, booking agents, marketing personnel, artists, and stylists. In relation to youth employment the event has employed a number of students as interns during the life of the event. Furthermore, Sumfest has acted as a launch pad for a number of artistes and other professionals who have gone on to make a name for themselves in the cultural and creative industries locally.

Figure 9
Expenditure from licensed outdoor music events



Source: ESSJ 2014 and 2015, <http://jamaica-gleaner.com/article/business/20160724/downswing-creative-market>.

Sumfest is one event following on only a few others which have used ICT in the broadcast of their product. The 2017 staging of the event saw the use of cutting edge Video Live Streams in both HD broadcast format and 360° Surround Video which were highly promoted for months globally, and streamed to the world on multiple media platforms. Viewership of the Live Streams ran into the hundreds of thousands of views from all over the world. Archival videos from Reggae Sumfest now number around 100,000 videos on YouTube, with views in the hundreds of millions. The festival itself has been promoted months on end through well managed global digital campaigns that had huge global penetration in the tens of millions, hitting web traffic, searches, YouTube, Face book, Reggae /Dancehall / Music / Lifestyle websites, and other platforms on a massive global scale.

What is also a success coming out of the change in ownership of Sumfest is the return of the sound system clash as a uniquely Jamaican performance mode in the Heavyweight Sound Clash staged in 2017. The event was a success with five sound systems competing. As the clash events have declined in Jamaica, they have maintained a presence on the global landscape in the Red Bull Academy sound system clashes and dubplate events.

Box 1**A successful reggae music venture: Rebel Salute**

The Jamaica Tourist Board (JTB) reported in 2013 that the annual Rebel Salute reggae festival attracted patrons from some twenty countries. Established since 1994 as an annual birthday celebration for owner and conceptualiser, Patrick 'Tony Rebel' Barrett, the festival is world renowned for catering to roots reggae lovers. It is marketed as a family-oriented festival with stipulations around lyrical content, non-alcoholic beverages and (v)ital food offerings which are linked to promotion of healthy Jamaican music and lifestyle. Artistes span the principal genres of reggae and dancehall who cater to patrons of all ages. Tourists form a huge percentage of the patrons at Rebel Salute amounting to 1/3 of all attendees.

The model of financing for Rebel Salute is typical. It is a private enterprise which has benefited from a range of sponsors. In an interview with Festival owner about production cost, Barrett revealed that the cost of staging the annual event is approximately JA\$50M. The festival was once billed as Pepsi Rebel Salute during the period of a three-year sponsorship agreement with Pepsi Co. It has also benefited from sponsorship deals with True Juice and Jamaica Tourist Board. These sponsors are seen to be aligned to the brand and overall mission of the festival. Currently organised by the Organic Heart Productions, Rebel Salute attracts most online sales annually from countries including Canada, Bermuda, Denmark, Finland, France, Germany, Great Britain, Martinique, Netherlands, Portugal Spain, Sweden, Switzerland, and the USA.

Between 2013 and 2014, media representation from some 12 countries across North and South America, Europe, the UK and the Caribbean including Billboard, NBC Reggae Festival Guide and El TiempoProfile covered the festival ensuring the transmission of its offerings to music consumers worldwide.

The parish of Saint Elizabeth was the first home of Rebel Salute for nineteen years and since the twentieth staging (2013) the event was relocated to Ocho Rios. This has increased access to the festival via mainstream transportation networks, including two international airports and shuttle bus services specifically used for the festival. There has also been an increase in overall patrons from the parish of Saint Ann and its environs. In previous years festival patrons hailed mainly from Kingston and Saint Andrew, Saint Catherine and Saint Elizabeth. The composition of attendees from St. Ann since relocation is significantly higher in proportion to the number of Saint Elizabeth patrons when the festival was held there. There is an indication therefore that support for the festival since relocation has increased and benefits significantly not only from locals but parishioners specifically. In 2013 the JTB reported that local patrons were mainly from Saint Ann (32 per cent), Kingston (17 per cent), Saint James (12 per cent) and Saint Catherine (10 per cent). Estimates were that 1/3 of patrons were tourists. According to the JTB 2013 report, the "highest proportion of the visitors attending Rebel Salute in 2013 were from the USA (37 per cent), followed by Canada (17 per cent) and UK (11 per cent). Persons from other countries accumulated to 36 per cent. There was a 5 per cent increase in the percentage of visitors from the USA and 3 per cent from Canada when compared to 2012.

Box 1 (concluded)

Visitors from the UK and other countries on the other hand decreased by 3 per cent.” Overall, it was estimated that the proportion of visitors to Rebel Salute increased by approximately 11 per cent when compared to 2012. “The majority (66 per cent) indicated that they were repeat visitors to Jamaica.” Some 50 per cent of the visitors indicated that they were first time attendees. The JTB also reported that an “overwhelming majority (98 per cent) of the local patrons indicated that they [had] seen improvements in the festival. This is an 11 per cent increase in comparison to those who said same in 2012. A smaller proportion of the visitors, albeit the majority (76 per cent) stated same.” (JTB 2013 Report)

The appeal of Rebel Salute 2013 and beyond can be assessed by the fact that a majority of (62 per cent) an increase over 2012 by some 20 per cent, “thought the event was excellent (78 per cent) and good (27 per cent).” Other as areas of appeal include the line-up of performing artists, music, security, venue, bathroom, food, beverage. We specifically mention here the ‘high level of interest to attend future staging of the event and ‘patrons’ willingness to recommend the event to family and friends’ which were also used as factors to assess the appeal of Rebel Salute and overall satisfaction. “The majority (80 per cent) of the locals were very interested in attending another Rebel Salute. This was the same as 2012.” Additionally, the “festival will be ‘definitely recommended’ by 95 per cent and ‘probably recommended’ by 5 per cent.” (JTB 2013 Report).

II. The film industry in Jamaica

A. Background

Jamaica has a long tradition in film, although the sector has been dominated by on-location foreign films. Jamaica has produced more than 141 films, with the number rising in excess of 200 if films with part footage in Jamaica and the rest in other countries were included (Polack, 2017). One of the earliest recorded film shot in Jamaica was the “Daughter of the Gods” in 1908. Further, “The Devils Daughter” filmed in Jamaica in 1939 was the first American black feature film. A range of genres of films have been produced in Jamaica, from documentaries to drama to action thrillers to horror.

Despite its long history in films, Jamaica did not create a full-service film promotion agency until 1984 when the Jamaica Film Commission was established as a department within Jamaica Promotions (JAMPRO), the country’s Trade and Investment Promotion Agency. The Commission facilitates film producers along different segments of the value chain, from pre-production to exploitation. Although the Commission has given greater emphasis to the development of the local film sector in recent times, its primary mandate has been to attract foreign productions and investment in studio facilities and other venues. Indeed, one of its central objectives is to promote Jamaica as the premier location for filming. In this regard it assists foreign productions with securing locations and local talent/crew, advocate for the development of the film ecosystem, and negotiates co-production arrangements among other forms of facilitation.

The strategic and targeted campaign of the Commission has led to an upsurge in highly billed foreign productions since then, including *The Mighty Quinn* (1989), *Treasure Island* (1990), *Knight and Day* (2010), *King of the Dancehall* (2015), *Sprinter* (2017) and *Yardie* (2017). Nevertheless, in the early period, the heavy focus on attracting foreign film productions led to less emphasis on nurturing an indigenous film industry. However, in recent times, the Jamaica Film Commission has been actively facilitating the development of the local film industry by a range of training and incentive programmes. The development of the domestic film industry and wider film aesthetic is crucial as Cham (1992) for instance has noted that foreign producers often use the Caribbean as a canvass to manufacture a stereotypical image that is often at odds with the day to day reality of the lives of its people.

More so than the music industry, local film producers in Jamaica continue to face serious challenges that have stymied the development of commercially viable productions. Key challenges along

the value chain include a shortage of well-trained script-writers, producers, directors, cinematographers and other skilled technicians, a shortage of financing, inadequate training institutions and underdeveloped distribution and exhibition platforms (Jamaica National Export Strategy: Entertainment, 2009). It is therefore incumbent upon regional governments in partnership with film makers and the wider private sector to work in concert to develop the institutional and incentive framework to create an indigenous film industry.

Nevertheless, Jamaica has some strong points, which if properly harnessed through public policy could provide a platform for developing a strong local film industry. A clear advantage is the country's abundance of natural trainable talent, a cadre of production personnel who have honed their skills by providing a range of services for foreign on-location film makers, beautiful scenery, an improved intellectual property regime, and a renewed focus on the development of the local film industry ecosystem by the Film Commission. The full leveraging of these and other assets could provide the basis for a dynamic niche local film industry in Jamaica. Such a sector will not only provide employment for direct and indirect participants, but could boost foreign exchange earnings through sales abroad and also contribute to the cultural identity of the country. There is also scope for strengthening linkages among music, film, tourism, and fashion to create a more integrated and economically sustainable creative sector.

Despite the challenges that film firms and ventures have faced in Jamaica, a number of them have developed successful ventures and businesses. This has enabled them to contribute to empowering local communities by providing the opportunities for youths to acquire skills and experience that could be used in the workplace and also by developing commercially viable businesses that contribute to employment, government revenues and income for local suppliers of inputs into their operations.

This section of the study examines case studies of two successful ventures in the film sector. The first is the UWI Community Film Project, which is a project of the Centre for Tourism and Policy Research at the UWI Mona. The second is a leading documentary film "Songs of Redemption", which deals with prison rehabilitation and redemption through music at the General Penitentiary in Kingston. The first case study was chosen in order to highlight the potential of community film to contribute to the development of an indigenous film culture in Jamaica. Although it might not entail large commercial returns, the training and awareness provided through the Film Project continues to contribute to the wider film dynamic in the country. The second case study was chosen for its potential to inspire positive change in the society and also because there was a commercial element to it as the film was produced with the aim of making a positive return.

The study uses a key or critical success factors approach to unearth the most salient drivers of success for these two ventures. The basis for this is the view that there are certain critical drivers, which properly harnessed has led to the success of the ventures discussed and the framework is useful for study of other creative sector firms or ventures. The rationale for studying the success of representative individual ventures is that lessons learned might be applicable to other firms both in Jamaica and the wider Caribbean. This could provide insights for instance, into what segments of the value chain or networks feature film producers in Jamaica need to focus on; what approaches are best suited for scaling up their activities for export; and how should they respond to the digital disruption in distribution.

Simonton (2009) put forward three essential criteria for feature-length narrative films. These are: critical evaluations, financial performance and movie awards. Critical evaluations are important as the reviews and ratings of critics are often important in influencing public viewing of films during their release in cinemas. Critics' opinions tend to be quite important at the beginning of the theatrical release of a film and later on when reviews are provided in popular movie, video and DVD guides. Given the underdeveloped nature of the film industry in Jamaica and the wider region, critical evaluations are not as well-established; nevertheless, reviews in newspapers and on popular websites, especially by informed persons do influence public cinema attendance and television viewing for those local films that are released on television.

Financial performance is an important critical success criterion in film making. As is often noted to continue in business the film must pay for the light, sound, actors and other inputs into the production

and distribution process. The financial performance of local films in Jamaica and the wider Caribbean is often strongly influenced by cinema ticket sales, print sales (CDs and DVDs) including at film festivals and more recently on-line sales (streaming of content).

Film awards are also important measures of success in the industry. The headline awards at the international level are the Oscars, Golden Globes and Screen Actors Guild awards in the United States. Simonton (2009) has found that awards tend to cluster into four dimensions: the dramatic cluster that revolves around writing, directing, acting and editing; the visual cluster that includes, cinematography, art direction, makeup and costume design, the technical cluster that centres on special visual effects, sound editing and sound mixing and the music cluster based on score and song. In the case of Jamaica and the wider Caribbean awards at local, regional and especially international film festivals are more relevant. Caribbean film makers have long prized attendance and networking at the leading international film festivals, including the Cannes Festival, Toronto Film Festival, Sundance. The winning of awards at these and other festivals is often an important driver of the success of regional films both at the box office and on online platforms such as Netflix, Apple iTunes, Amazon and Vimeo. University screenings of Caribbean films in the United States and the United Kingdom are also a welcome source of publicity and discussion of these films. Storm Salter, producer of the Jamaican film 'Better mus come' (1990) has noted the importance of University screening of the film in the USA and the question and answer segment after the screening (Martens, 2015).

Film continues to be a growth sector in the world economy. Statista estimates that global box office revenue, one component of the sector is projected to increase from over US\$38 billion in 2106 to US\$49 billion by 2020.

Filming in Jamaica is over 100 years old, nevertheless the industry remains underdeveloped. The film value chain in Jamaica consists of a range of players from script writers to producers, editors, sound engineers to promoters and distributors, among others. Back in 2003, Stanbury estimated that there were some 20 companies actively and consistently involved in film and video production and over 300 private contractors who provide support services to the sector. The Culture and Creative Industries Business Plan that was commissioned by the Planning Institute of Jamaica (PIOJ) indicates that in the audiovisual sector (film, video, TV and radio) there are currently at least 20 companies actively involved in film and video production and there are over 300 individual private contractors who provide a range of services to the sector. Employment in the sector accounts for around 0.52 per cent of total national employment and the sector represents 0.62 per cent of GDP.

The Jamaica Culture and Creative Industries (CCIs) Business Plan provides a blueprint for the competitive development of the sector. The Plan highlights the critical role of Jamaica's CCIs as a generator of employment, an opportunity for growing competitive exports in global markets and a generator of positive spill over effects in other sectors, including tourism and manufacturing. In effect, the CCIs are arguably best positioned to contribute to a distinct Jamaican brand in most areas of production and trade that could contribute to both product/service quality and differentiation.

The Plan notes that the film and audio-visual subsector contributes to important spill overs into tourism and other sectors. Indeed, interactive media and digital platforms are convergent technologies that help to integrate CCIs and other sectors. This can not only help to scale up activities, but contributes to unique portfolio offerings in music, fashion, sports and other sectors.

The Jamaica Film Commission continues to undertake a number of programmes and projects to advance the development of the film sub-sector in Jamaica. Important among these are:

- Under the National Export Strategy, to identify and participate in 3 film festivals per year to promote and market local films in major markets. In 2016-17, missions were undertaken to a number of film festivals including the Tribeca Film Festival, the Toronto International Film Festival and the Trinidad and Tobago Film Festival. The main achievements for the 2016-17 period included, the holding of 42 investor/buyer meetings, 17 persons being exposed to the market increased awareness through new contacts.

- The Film Commission held a Creative Industries Open House Forum in 2017. The Forum included presentations on services, the role of JAMPRO and issues relating to policy incentives, industry governance among others. 118 persons attended the Forum and its live stream got 238 views.
- Export promotion missions and road show were undertaken in 2016. These focused on skills development, technical cooperation and the exchange of knowledge. The road show entailed a study tour to Seoul, South Korea and to Birmingham in the UK.

B. The film value chain in Jamaica

According to Porter (1985), a value chain is the connected series of activities that a specific industry performs in order to create and deliver a product or service to the market. EDICTIVE (2017), indicates that an industry's value chain can be divided into primary activities that include operations, service, logistics, sales and marketing and support activities or infrastructure such as procurement, technology development, and financing and human resource management. The film value chain refers to all stages involved in the pre-production, production, distribution, exhibition and exploitation of the product/service across the film business. From an intellectual property standpoint, the film industry entails a 'bundle' of rights. These related rights that combine in a film product can be divided into three parts: i) the underlying rights; ii) newly created copyrights; and iii) exploitation rights (Finney, 2014). The underlying rights to a film usually begin with a book, script, play or other material that has been acquired, along with other underlying rights to character, image or music that are used in the film. These rights are usually acquired from third parties who own them. After a film has completed the production and post-production stages, a new right is created- the film copyright. Related copyrights are usually created for the soundtrack, costumes or characters. The film copyright is exploited by licensing agreements for sale, distribution and merchandising of the product and services to third parties.

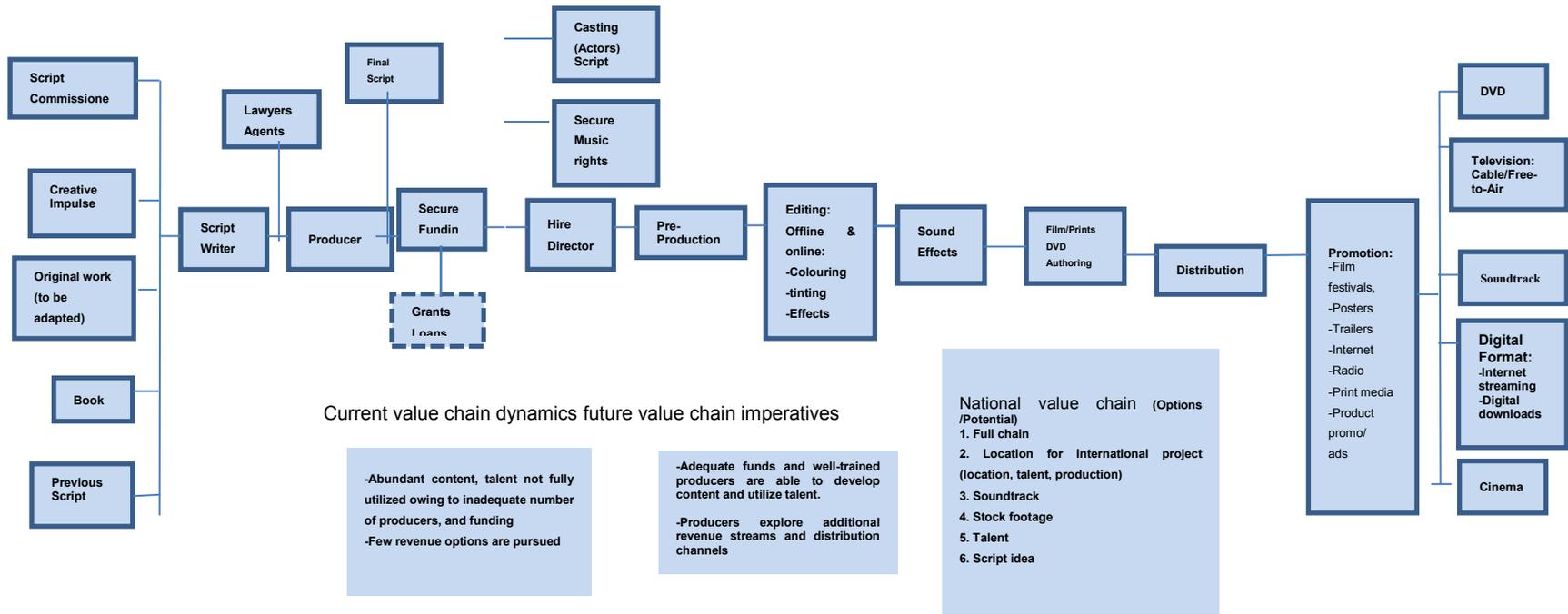
The global film value chain has evolved over time, owing to a number of forces, including increasing concentration due to mergers and acquisitions, changes in technology and financing arrangements (Yong Jin, 2012). Moreover, the studio model, epitomised by Hollywood is different from the independent film model, which is more applicable to domestic feature film sector in Jamaica and the wider Caribbean. The Hollywood model has developed as a result of increasing vertical and horizontal integration of the film industry in major markets, especially the United States. Vertical integration in which the Hollywood majors control most parts of the value chain from pre-production to production to domestic and international distribution is a major source of power in the industry (Ferrer-Roca, 2014). For example, Disney, a major studio, often sells merchandise based on its films and features its films on its cruise line. Vertical integration is reinforced by horizontal integration where the majors own and distribute their films through different platforms such as theatres, pay-per-view TV, streaming services and traditional cable TV.

As diagram 3 indicates the film value chain in Jamaica spans the segments from pre-production to production to distribution and exhibition. In the pre-production stage, the script for the film is commissioned by securing a script writer. This is a critical stage as good stories with sound plots are essential in making a high-quality film. Lawyers and agents intermediate between scriptwriters and producers to ensure proper intellectual property contracts. With the final script in hand, the Producer seeks out funding for the film venture.

The Director is then contracted to manage the production, including contracting the actors, securing, music, animation and other rights and selecting locations. The process of shooting, editing, adding music, sound and animation effects is a key component of film production that requires a skilled and creative Director. Determining the formats for distribution is also important, especially in this digital age. Jamaican film makers need to allocate a portion of their budget for market research to guide their distribution formats. Traditionally film prints, including CDs, DVDs and now Blu-ray were important formats, but online streaming is now an important source of demand.

Jamaica, like its CARICOM counterparts, confronts a number of challenges at different stages of the film value chain. The main areas of challenge are analysed below.

Diagram 3
The film value chain in Jamaica



Source: Jamaica National Export Strategy: Entertainment, 2009.

C. Major challenges along the film value chain in Jamaica

1. Insufficient affordable finance

Finance is an important binding constraint for independent film makers across the world. Arguably, the situation is even more serious in Jamaica, where financing for risky ventures with uncertain returns is even scarcer. As Frampton (2014) notes, there are three models of film financing: the subsidy finance model, the pre-sale model and the pure equity model. The subsidy model entails the use of public subsidies such as grants, tax concessions or soft loans to fund film projects. The pre-sale model is where the film maker is granted loans and advances against a portion of the distribution rights of the film. This model is hardly ever available for fledgling independent film makers, such as those in the Caribbean, because there is a lack of an established reputation based on directorial and acting experience mean financiers are not willing to take the risk.

Meanwhile, the pure equity model entails individual or institutional investors investing in the film in return for a share of its profits. Therefore, their rate of return depends on the success of the film. Again this model is hardly used in the region. However, Antigua and Barbuda have entered a deal with wealthy Angel investors to finance a new film on the life of Bob Marley, under its Citizen by Investment Programme (CIP). The film will be produced by Golden Islands Filmworks Ltd, which is based in Antigua but backed by Hollywood experts. The government of Antigua and Barbuda has entered a deal with the company to finance five feature films to the tune of US\$125 million. This is part of a wider initiative to develop a nascent film industry on the island.

The Jamaican government has in place a system of incentives for film, but all indications suggest that these have benefited foreign on-location films much more than domestic film makers. These include tax-free profits from overseas release of film and video for a period of nine years; duty free and tax-free concessions on equipment, machinery and materials for the building of studios and support facilities; an investment allowance of 70 per cent of the amount spent on investment in infrastructure, with the ability to carry-forward the unused portion and a general consumption tax (GCT) rebate of 16.5 per cent for all goods and services bought in Jamaica for the film project, among others. Nevertheless, owing in part to the high public debt and constrained government financing, very little direct financial support is provided to domestic film makers.

In Jamaica many indigenous film makers have to finance their projects from their own savings and what they can scrape together from disparate sources, including small foreign grants and public assistance where available. Commercial banks which dominate the financial system are reluctant to provide financing for film making and other creative sector activities, which they often deem not bankable because of the high risk to return perception for these activities. Chaitoo (2013) also notes that the banking system is preoccupied with lending to brick and mortar businesses or physical plants and remains averse to more risky service activities. Jamaican film makers might need to explore improved joint production arrangements with international film makers who can provide finance and technical knowhow that could be combined with Jamaican indigenous capital and talent.

The Development Bank of Jamaica (DBJ) operates a loan window through the commercial banks, which is based on traditional collateral requirements. The programme allows micro small and medium size enterprises (MSMEs) defined as businesses with less than 5 to 50 employees and total annual sales or turnover ranging from less than or equal to J\$10 million to J\$150 million, to secure up to 90 per cent of their financing. The loan package allows businesses up to 10 years to repay at competitive interest rates.

2. Challenges in the areas of script writing, distribution and exhibition

The consensus among the film experts both from individual interviews and the JAMPRO Stakeholders Forum was that script writing at the front-end and marketing and distribution and exhibition at the back-

end were the two most important bottlenecks in the sector. The view of stakeholders (JAMPRO's Creative Industry Stakeholder's Forum⁶) was that there is a wide gap between the leading script writers and those with lesser ability and expertise. A key issue that needs to be addressed is how to create stronger storylines and plots for short films, feature films and documentaries. This depends on the innate ability, training, experience and exposure of the writer to top class writers from whom they can learn their craft. An important issue raised was that Script writers need to put more effort into creating stories that meet the demand and expectation of their audiences to be commercially viable. In a welcome development, The Jamaica Film and Television Association (JAFTA) Propella Initiative has been assisting up and coming film makers with producing commercially viable scripts.

Films are not purely aesthetic events, so producing a good film is not enough. The film maker needs to find the right medium to distribute and exhibit his/her film to make it profitable. Distribution is one of the most challenging aspects of the film value chain (De Vinck and Lindmark, 2014). In fact, it is the area that has been most disrupted by digital technologies. This makes it critical for distributors of films in the region to be as innovative and *au courant* with the latest technologies and networks to maximize their returns relative to distribution spending.

Most film makers in Jamaica and the wider Caribbean have little money left for marketing and promotion after producing their films. As a result film festivals provide a key platform for marketing and exhibiting their films. Indeed, the Independent Cinematography Office of the UK, only about 10 per cent of feature films are exhibited in cinemas worldwide. More countries in the region have been hosting film festivals. Since its inception in 2006, the Trinidad and Tobago Film Festival (TTFF) has grown into one of the Caribbean's premier festivals. The festival provides the opportunity for Caribbean film makers to exhibit their work, participate in film workshops and labs, network with regional and international filmmakers and to identify potential sources of funding for independent films. The Bahamas hosts a top class international film festival, which has showcased over 1000 local and international films.

The inaugural Jamaica Film Festival was held in 2015. The festival was aimed at providing local film makers with the opportunity to display their talent and craft in scriptwriting, producing, directing and acting. In addition, it was geared to attracting local and foreign investors to boost investment in the sector to increase the number of local productions and improve the distribution and exhibition of local films. However, the festival was put on hold in 2016, as the industry response supported the Film Commission's decision to focus on upgrading the quality of local productions and the local ecosystem to create a greater footprint at future festivals.

Theatrical or cinema releases are also important for Caribbean films, especially those of a high quality. In a reflection of demand for good regional stories, high quality local films often attract full or near full audiences for a few weeks after release. In Jamaica local films often run for weeks in local theatres, even at an average ticket cost of US\$9 each (Frampton, 2014). Data from the Planning Institute of Jamaica indicate that revenues for the Palace Amusement Company, increased by 10.1 per cent from J\$113.8 million to J\$1242.5 million in 2014/15, driven mainly by higher film rental, box office receipts and confectionary sales. However, in 2015/16, revenues contracted by 1.5 per cent to J\$1223.3 million, owing largely to lower box office receipts and film rental revenues.

Nevertheless, the differential in power between local film makers and cinema operators mean that film makers might not get a fair share of the return from box office sales. According to the industry standard, cinemas return about 40-50 per cent of box office receipts to film distributors. From the box office receipts, the distributor has to deduct its distribution expenses and commissions (known as prints and advertising costs) and also its advance to the producer. The balance that remains goes to the producer and is called the 'overages' (Irish Film and Television Network, 2017). On time, within budget productions are key to producers increasing their overages.

⁶ The Authors of this study solicited the assistance of the JAMPRO Film Commission to convene a 'Stakeholders Forum' to discuss issues, challenges, opportunities and success stories in the film and music sectors in Jamaica on 27 May 2017.

As small operators, many Caribbean film makers undertake both production and distribution. It is therefore critical that they design a streamlined value chain to limit costs and maximize their returns at each stage of the chain. This means that they have to keep down costs at all stages from pre-production to production to distribution given the relatively small margins in the industry.

3. Film production

Good film production combines art and science and technology. To produce good films producers, require high quality equipment that is costly, also the cost of securing good locations in Jamaica tends to be high (JAMPRO Stakeholders Workshop). Notably, this contrasts with premier film locations such as the United States, which offer a range of production incentives, including free locations and a range of tax incentives and cash grants (Beckford, 2015).

Co-production is a potential area of opportunity for Jamaica and the wider Caribbean. In 2007, Jamaica signed a co-production treaty with the United Kingdom, which opened an avenue for the country to attract larger budget, high quality productions, thereby transferring professional and technical skills and benefiting domestic productions. Nevertheless, Jamaica has derived little benefit from the treaty as the treaty requires a minimum contribution of 20 per cent of the budget from local financing, in an environment of significant risk aversion from financial entities.

4. Trading arrangements

Trade in audiovisual goods and services which include film, music, television and video games are regulated under the WTO. Nevertheless, countries have been trying to balance the cultural facets of the sector, including identity formation and cultural diversity with the commercial aspects including trade liberalization and market efficiency. As a result, the audiovisual sector is one of the least liberalized sectors across countries (Sauvé, 2005). At the regional level article 45 of the Treaty of Chaguaramas provides that “member states commit themselves to the goal of the free movement of their nationals within the community”.

Specifically, free movement has been permitted for artists, sports persons, musicians and media workers. However, generally the implementation of the protocol in this area has been arbitrary at best and often not in the spirit of the treaty. Artists and media workers travelling across the region to perform at shows or to undertake film work have been met with a range of overt and covert obstacles that increase their transactions cost and difficulty of conducting their trades in member countries. Important challenges faced by this group include high customs duties on equipment and materials of their trade, cumbersome customs procedures, including duplicate checking of customs records for the movement of the artist’s equipment and goods in the home and member country of the performance.

5. Local content in media programming

Caribbean countries have long been concerned about the overwhelming dominance of foreign media content. A dated study by Aggrey Browne found that in 1986, 88 per cent of programmes broadcast in the Caribbean were foreign. All indications suggest that this percentage remains quite high today, although there has been a proliferation of locally owned radio stations in some countries. There has been some debate about how the region should address the low local content in the audiovisual sector. Farrell (2010) has cautioned against local content quotas in the audiovisual sector, noting the disruptive effects of the internet that would make it difficult to regulate what consumers want to consume. He also notes the likelihood that service providers will provide lower quality programmes and difficulty involved in regulating complex media entities.

Meanwhile, Frampton (2014) acknowledges Farrell’s concerns about quota allocations, but argued that nevertheless they should be explored as a means to boosting the development of the local film industry in the region. He noted that the key is that quotas are complemented by broad support including training, production financing and fiscal incentives. On balance it seems that quotas should be considered as part of a progressive industrial policy mix for the creative industries. To be effective content quotas will have to be carefully developed, probably the simpler the better and should be complemented with film product development incentives to ensure high quality feature film production

that could attract the interest of fairly savvy regional public. It is noteworthy that local content requirements have been used in large economies such as France, Canada and China.

The CESCO study that was commissioned by the Jamaica Film Commission in 2016, recommended the use of content quotas for television, including cable and direct television providers and also for cinemas. The recommendations included allocations of 20 per cent of all screen time in the 7 a.m. to 12:00 p.m. slot to be reserved for Jamaican produced children and youth programming in the first year of implementation. This would increase progressively to 30 per cent and 40 per cent in the second and third year after the implementation of the quota. For prime time television, the study recommended that 30 per cent of all on-air programming be reserved for Jamaican produced episodic television, documentary, mini-series, comedy or television movie during the 7 p.m. to 11 p.m. slot in the first year, increasing to 50 per cent by the third year of implementation. It is recommended that cinemas be required to allocate 30 days per year with an equal combination of matinee and evening slots for domestic content film programming in year one. Also, at least 50 per cent (15 days) of this period must be weekends, including Friday, Saturday or Sunday, which is the prime period. By year three the allocation should increase to 75 days per year.

Similarly, Trinidad and Tobago has developed a draft Local Content Policy for Musical and Audio-visual Works. The draft policy recommends that any company licensed for television and or radio broadcast by the Telecommunications Authority of Trinidad and Tobago be required to allocate 50 per cent or more of its broadcast time to local content, within 24 months from the date of publication of the policy, in order to benefit from government's fiscal incentives.

6. Government policy

The traditional evolution and success of the creative industries in Jamaica and the wider Caribbean has been due more to the hard work, inventiveness and good fortune of the artists and creators rather than government support and clear public policy. This has been evidenced by the relatively low weight that ministries of culture hold in the ranking of ministries. In reality culture and the creative industries have long been the 'orphan child' of policy makers. However, the evidence is that this is changing as governments become more aware of the true potential of their creative sectors, both for identity formation, boosting economic growth and soft power diplomacy. This has been influenced by the loss of competitiveness in sectors such as light manufacturing and tourism and research that has shown that the creative sector was one of the most resilient during the recent global crisis.

James (2007) estimated that the copyright services sector which includes music and film contributes around 5 per cent of GDP and over 3 per cent of employment. It must be noted that these are sizeable portions of output and employment. Similar to other Caribbean countries, the sector runs a balance of payments deficit, partly reflecting its stage of development. However, in Jamaica segments such as the music industry were expected to run a surplus. Therefore, overall music and film and the wider creative sector can be earmarked as a potential growth pole in Jamaica.

There is evidence that public policy is catching up to grow the music and film industries in Jamaica. The Ministry of Culture, Entertainment, Gender and Sport (MCGES's) new draft National Policy on Culture and Creative Economy (2017-2027) marks an important departure from the past policy approach. The draft policy seeks to better integrate the cultural and creative industries into Jamaica's rich culture and heritage. In recognition of the dual role of cultural and creative industries, the policy seeks on the one hand to promote Jamaica's unique cultural heritage and expressions in an effort to maintain its people's identity and on the other hand to monetize the cultural and creative products and services so that they can contribute optimally to new jobs, incomes and foreign exchange earnings. The goal is to position the sector as a key plank in Jamaica's effort to diversify and strengthen the competitiveness of its economy, thereby contributing to sustainable development.

Overall both the aesthetic and commercial facets of the sector are expected to help enhance "Brand Jamaica", which is an important part of the country's competitive strategy. With respect to the film sector, the policy includes stipulations for local content/personnel as far as possible to bolster the development of the local industry through human capital development, technology transfer and technical

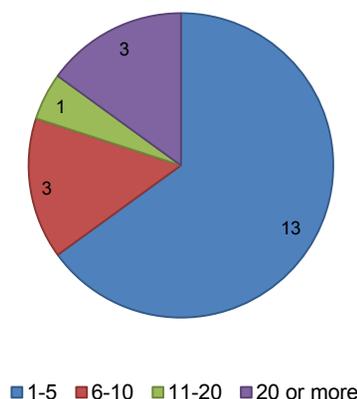
upgrading. Indeed, the new IMF representative to Jamaica, Dr. Lonkeng Ngouana, (2017) has noted that “Brand Jamaica” is underleveraged around the world; therefore there is significant scope for Jamaica to export a wider range of ‘identity’ products and services linked to its excellence in music, culture and sport in a range of markets.

D. Creative industries survey results: film subsector

A survey of businesses and participants in the music and film industry in Jamaica was undertaken. Unfortunately, the response rate was relatively low with seventy-nine participants attempting the survey; fourteen completed the full survey, while sixty-five only completed a portion of it. Nevertheless, despite the low full completion rate it was decided that given paucity of primary data on the sector some basic analysis of the completed questions would be carried out to provide some insights into the nature and operation of the subsectors. In the film sector it was found that of twenty-six responses, eight were incorporated businesses, ten were sole proprietors and two provided support services. This is in keeping with the profile of the sector noted at the JAMRPO Stakeholders Forum, where small individually owned businesses seem to be most important in the country. However, if the proportion of support service providers at around 8 per cent of the total is reflective of the wider industry, there might be some cause for concern as it might indicate that film makers are not adequately resourced by support services to carry out their craft.

The twenty-six businesses indicated that they employed less than two persons on average, underscoring the small size of firms in the film subsector.

Figure 10
The number of persons film operators employed in their business



Source: Creative Industries Survey- Film Section- Jamaica.

Of the nineteen businesses that responded, three (15.8 per cent) indicated that they had one skilled⁷ employee, three had three skilled employees and for two of them all their employees were skilled persons. Of fourteen respondents, four or over twenty-eight per cent put in business investment at start-up of less than US\$5000, while four were larger businesses with start-up investment of between US\$10,000-\$15,000. Nevertheless, only one business each had investment of between US\$20,000-\$24,000 and US\$30,000 or more. This again highlights that most businesses are relatively small with a limited capital base. Further, there is also the implication depending on their area of focus in the film value chain that a number of businesses might not be able to afford the most up to date, more expensive equipment, which could affect the quality of their productions.

⁷ Skilled employees are defined as those who had special knowledge, training and experienced for the job based on university level education and or on the job training.

Similarly, six out of fourteen operators (23 per cent) indicated that their average sales of film products and services, including live performances were less than US\$ 999, while only 1 earned more than US\$20,000 per month.

Six out of eleven businesses reported average monthly value of the sales of goods or services (including revenue from performances) of less than US\$999, while two had sales values between US\$10,000 and \$14,999.

Four out of fourteen (28.6 per cent) of businesses noted that they spent less than US\$999 on operational expenses each month, while six indicated that they spent between US\$1000 to US\$4,999, only two businesses spent in excess of US\$5000. With respect to different components of expenditure, of seven respondents, four (57.1 per cent) indicated that the rental of business premises was their most important item of expenditure each month, two (28.6 per cent) noted that outlays on materials and supplies were most important.

With regards to the success of their businesses, two out of seven respondents ranked access to finance and vision⁸, respectively as the most important drivers of their success. Interestingly, none of the respondents listed innovation as the most important contributor to their success. If this is representative of the wider industry, it is an area of concern given the critical role of innovation and new technologies and platforms in the production and distribution of films. Half of the 8 respondents described the general policy environment as somewhat favourable to very unfavourable and no respondent described it as very favourable. Although only indicative, this corresponds with the general sentiment from interviews and the JAMPRO Stakeholders Forum that noted that there is need for greater tangible policy attention to the creative sector.

Of nine businesses that responded five (55.6 per cent) noted that they have not benefited from any government incentives such as tax breaks, duty free concessions or extension services, while four (44.4 per cent) noted that they benefited from some concessions.

Box 2

Veteran contributor to film development in Jamaica – Franklyn St. Juste O.D.

Franklyn St. Juste has been engaged in the production of motion pictures for 50 years in all areas of production activity, which includes scripting, directing, photography, editing and sound. He has worked as Director of Photography on the films “The Harder They Come” and “Children of Babylon”.

He is currently Adjunct Senior Lecturer at the Caribbean School of Media and Communication (CARIMAC) – University of the West Indies, in the areas of Broadcast Media Management, Film and Television Production.

Franklyn St. Juste is the recipient of several Jamaican National Honours – Order of Distinction (OD) and the Silver Musgrave Medal for Achievement in Cinematic Arts; Life Achievement Award – Caribbean Tales Film Festival; as well as other awards, both international and Jamaican, including in theatre lighting design.

E. Case study one – the UWI Community Film Project

Community film arose as a counter to the large national and global film industry. Community film projects seek to embed filming in communities to respond to their need to tell their own stories through film. As Wikipedia notes, community film operates within education and community work environments as a force for promoting human rights and advocacy on behalf of individuals and communities (Wikipedia, 2017). It emphasises the potential impact of collaborative creativity or mass innovation on a community and could indeed contribute to developing critical mass in film, especially in developing countries.

⁸ Vision is defined as the ability to identify new trends and direction in which the sector is heading.

Image 1
Centre for Tourism and Policy Research photo of UWI CFP



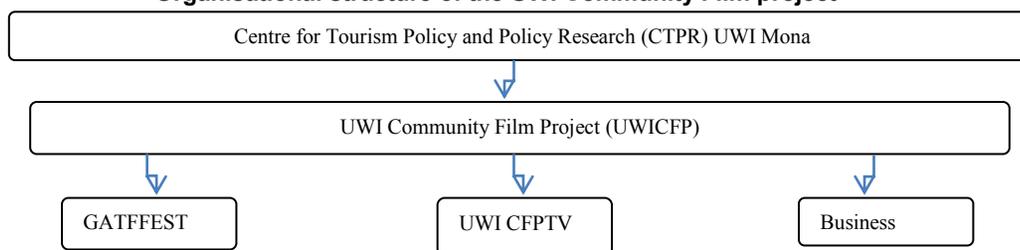
Source: UWI Community Film Project.

The UWI Community Film Project (UWICFP) arose out of an initiative by the Centre for Tourism and Policy Research (CTPR) at UWI Mona. The project aims to provide training in film making for youths in low income, marginalised and at-risk communities. The project provides an avenue for matching the demand for local, indigenous stories, themes and portrayals with the supply of untapped, raw talent. The main objectives of the programme are:

- To open up potential employment opportunities for youths in the communities through training in film-making, with a focus on gender balance.
- To use film making as a medium for investing youths with greater self-esteem and a more positive attitude towards work and community development.
- To use film as a medium to highlight community issues based on the shared interests, talents, concerns and creativity of young people.
- To promote increased cohesion, unity and solidarity among different members and segments of the community.
- To contribute to the development of a wider indigenous film aesthetic and industry in Jamaica by boosting the critical mass of skilled persons who can be hired not only for on-location foreign films, but for domestic indie films.
- To influence youths away from deviance and criminal activity and to reduce recidivism for those who have exited the prison system.
- To facilitate community development and heritage tourism through film and video production

Diagram 4 shows the organisational structure of the UWICFP. The CTPR has overall responsibility for the Project. The Film Project is linked to the Greater August Town Film Festival (GATFFEST), which provides an avenue for exhibiting films from the festival, while UWI TV provides internship for the participants and all these aspects are aimed at contributing to business development.

Diagram 4
Organisational structure of the UWI Community Film project



Source: UWI Community Film Project.

These goals are being realised by the creation of a small film ‘cluster’ that integrates technical, financial, operational and managerial resources. The programme has brought together a group of technical experts to train students in the theory and practice of film making. The training covers the different stages of the film value chain to enable students to fully understand and appreciate what it takes to take a project from script to the screen. Participants are trained in production, selection of location, directing, costume and set design, cinematography, make-up artistry, art direction, acting and editing, film psychology and distribution and exhibition. The focus is on mixing theory with a heavy ‘dose’ of on the ground, practical experience so that participants can undertake their own film projects.

Participants work in groups during the training to share ideas and create their own film project. Each group is required to brainstorm to create its own topic and theme and to use the material taught to create their own 5-10 minutes short film. This provides the basis for producing longer films as they gain more experience (UWICFP, 2015). The students are assessed based on attendance, class participation and the quality of their final film production. Students who meet minimum standards in each criterion then graduate the course with a Certificate of Participation.

Further, the expectation is that participants on completing the programme will be able to find gainful employment in the area or be able to set up their own small businesses providing video and film solutions for persons in theirs and other communities. Nevertheless, it has been found that even those participants who have not gained employment in film or video production have benefited from the training and have been able to use the habits of discipline and structured work in other jobs. In effect the training has made them more prepared for the job market.

As the table below shows between August 2012 and December 2016, 224 graduates were trained under the UWICFP, 74 females and 150 males. Initially, the project targeted youths from a number of low-income communities, including The Greater August Town, Mona Commons, Trench Town, and Portland Cottage. Nevertheless, the scale and scope of the project has expanded to include a number of other communities in Montego Bay, including Norwood, Rose Heights, and Glendevon and also Johnston Town in Lucea (see table 7 below). The project aims to create an ecosystem in which film-making can thrive and develop in these communities. This is based on providing relevant training and support services that enable participants in the project to hone their craft. The project facilitates a ‘can do and do it yourself’ culture among participants, which would help them to find employment or self-employment after the training.

The Film Project has evolved over the years becoming more ambitious in scope. In 2014, the Project expanded to Western Jamaica and produced the first batch of graduates from Montego Bay. In keeping with the times, the participants were trained through a mix of face to face and Skype sessions. The programme was also extended to the Portland Cottage community and, in a welcome development, three graduates from the area were offered scholarships from UWI, owing in part to the initiative of the Sustainable Rural and agricultural Development Research Cluster at SALISES and the Caribbean Coastal Area Management Foundation (C-CAM) which have been working in the community.

Table 7
Number of cohorts trained from different communities

Cohort	Date	Number of graduates	Community of residence of graduates
Cohort 1	August 2012	5	The Greater August Town
Cohort 2	December 2012- February 2013	16	The Greater August Town
Cohort 3	September - December 2013	30	The Greater August Town
Cohort 4	January - March 2014	41	Mona common & Nannyville
Cohort 5	September – November 2014	35	The Greater August Town, Portland Cottage & Norwood & Canteberry (Montego Bay)
Cohort 6	September - December 2015	35	August Town, Trench Town, Jones Town, Spanish Town (Kingston) & Salt Spring, Norwood, Flankers, Rose Heights, Rosemount, Glendevon in Montego Bay & Johnston Town in Lucea
Cohort 7	June - August 2016	18	Rose Town, Maxfield Avenue, Greenwich Farm
Cohort 8	September - December 2016	44	August Town, Trench Town, Jones Town, Spanish Town (Kingston) & Salt Spring, Norwood, Flankers, Rose Heights, Rosemount, Glendevon in Montego Bay & Johnston Town in Lucea

Source: The Centre for Tourism and Policy Research, UWI Mona, UWICFP.

1. Critical success factors in the UWI Community Film project

Although the UWICFP is a work in progress it has realized some critical success measures, which point to its potential to contribute to the development of a successful indigenous film niche in Jamaica. The success factors could be analysed as follows:

a) A broad community search for talent

An important success factor of the Film Project is its broad search for talent in various communities across Jamaica. By engaging as many communities as possible, the Project is likely to contribute to the country achieving a critical mass of persons along the different segments of the value chain.

Critical mass works on the law of probability in that the more persons who are recruited from the targeted communities to participate in the Film Project, the more likely it is to get a few stand-out graduates who would be able produce high quality feature films that could garner critical acclaim and financial success both on the local market and at international film festivals such as Cannes and Toronto. Indeed, given its small population, Jamaica would do well to undertake as wide a search for talent as possible to foster the necessary competition and networking that could stimulate the development of a vibrant indigenous film industry. Also, Film Project could search for international exchange programmes with community film projects and universities abroad to share experiences and learn from their programmes.

Indeed, the continued spread of the Film Project can lead to network effects or positive externalities result from the interaction of a large number of participants with local trainers and international experts (Moraga, undated). This might just provide the hotbed that produces the ‘Bob Marley’ of Film in Jamaica. It is also noteworthy that reggae music evolved out of the marginalized communities in Jamaica, which have long been wellspring of creativity and talent.

b) A hands-on apprenticeship-type training programme

Filmmaking is a difficult and involved art and business. Nevertheless, a number of filmmakers have noted that formal film school training is not necessary to excel at the craft. Indeed, renowned filmmakers such as Quentin Tarantino, Christopher Nolan and Paul Thomas Anderson did not attend film school. It has been found that apprenticeships programmes that provide hands-on practical experience in

filmmaking are more effective in teaching students the craft and creating the networks and connections that would help them to succeed in the industry. This means that real world experience tends to trump formal film school training in the industry (Film Connection, 2012).

An important success factor of the UWICFP has been its use of a mentor-apprentice approach. This has allowed the participants to learn from experienced persons in the industry and to work on actual film projects after having learned the fundamentals of filmmaking. In fact this approach that provides a mix of theory and much practice is best suited to participants, since most are low skilled, often without High School CXC certification. Therefore, the apprenticeship approach provides flexibility to tailor the training to their abilities and needs.

The programme has enabled the participants to hone their skills at reasonable pace, to undertake on-location small film projects for assessment, to receive direct feed-back and to interact with and share ideas and experiences with their peers. Combined these factors enable trainees to learn more quickly and solidly so that they can undertake their own projects or set up their own small business providing video and short film for weddings, funerals and other events in their communities. In addition, some trainees have gained employment with UWI TV. This allows them to hone their skills in a systematic way and to gain experience in an organized and structured setting, to better understand the organizational culture surrounding filming.

An essential component of the project has been the opportunity it provides for graduates to get internships and work at production houses where they could further develop their skills and take their filmmaking to the next level. The programme has been supported by the RJR Group/RETV and Lennie Little-White of Mediamix.

c) A basic financing model

Adequate and appropriate finance is essential for the development of successful indigenous film industry. As Bintliff (2011) has noted, films are expensive, risky propositions. The Film Project has a nascent finance model built on funding by the private sector including Grace Kennedy Foundation, the Office of the Principal at UWI Mona, UNESCO. In 2016, the full group of participants was funded by the Jamaica Social Investment Fund (JSIF). The Fund provided a grant for J\$1.5 million to the Project. This was an explicit acknowledgement of the important development contribution that the programme is making in vulnerable communities. The JSIF manages a loan of US\$42 million from the World Bank to implement the Integrated Community Development Project (ICDP). Given that Jamaica's Vision 2030 Plan has strengthening education and training for the creative industries and growing the number of creative businesses as two goals, continued funding for the UWICFP under the JSIF would be a welcome development.

Nevertheless, as the Film project expands, it is expected that other sources of finance will be needed to expand the pool of resources. This would enable the Project not only to attract a larger cohort of participants, but also to invest in better quality, equipment and to delve deeper into other areas such as animation and computer graphics. To scale up financing, other corporate entities need to come onboard to support the Project as part of their Corporate Social Responsibility (CSR). In addition, a scoping assessment should be done to find out the range of international organisations and NGOs that might be interested in financing a community film project that empowers youths from marginalized communities.

d) Film festivals – the role of the Greater August Town Film Festival (GATFFEST)

As the Caribbean's largest community film festival, the Greater August Town Film Festival GATFFEST's origin is deeply rooted in community development. The festival originated from the UWI Community Film Project (UWICFP). GATFFEST is an important complement to the UWICFP as the festival was developed to provide an outlet to showcase and exhibit the films that were produced from the project (UWI, 2017). The festival has been running for the past five years and has become an established part of the cultural calendar in Jamaica.

Crucially, the festival recognizes the importance of both competition and networking to the success of the indigenous film sector. Therefore, local, regional and international film producers are all

allowed to present their work for selection based on their quality. Over time this has had the effect of spurring the UWICFP graduates to strive to improve their skills ranging from script writing to exhibition in order to compete with foreign feature films, many of which have larger budgets and better trained personnel. Competition is indeed the springboard for innovation and improved product/service quality and each year the number of films submitted to the festival has been increasing thereby increasing the competition for selection. Indeed, in 2017 it was noted that over 1600 films from around the world were submitted, of which 70 were selected to be viewed during the festival. The large number of films meant that the festival had to be extended in 2017 from four to ten days and a number of the films had to be shown at the Palace Cineplex Complex.

Importantly, GATFFEST provides an ideal opportunity for local film makers and aspirants to make contact and network with experienced feature film makers from around the world. During the festival, workshops, panel discussions and question and answer sessions are conducted by experienced international and local film makers. These provide ideal opportunities for students and other participants to learn so they can improve their craft. At GATFFEST 2017, renowned international film makers, including Menelik Shabazz whose films include ‘Burning an Illusion’, which won the Grand Prix at the Amien Internaitonal Film Festival in 1982 and who also produced “Catch a Fire”, as well as Andrew Tucker the Australian film maker whose feature length documentary ‘Accordion’s Voyage’ won the India Catalina at the Colombia International Film Festival’ were contributors at the Film Workshops. They presented on topics that are quite relevant to indigenous feature film production in a developing society. Menelik presented on how to produce one’s film projects and how to use the new distribution, marketing and exhibition models to generate revenue. Tucker presented on film making on a small budget, which is quite relevant to the situation in Jamaica given that most participants at the JAMPRO Stakeholders Forum highlighted insufficient and high cost of finance as one of the most significant constraints to film development in Jamaica.

e) Supporting institutions for development of skills and expertise

The film project has established collaborations with the Edna Manley College of the Visual and Performing Arts and the Caribbean Institute of Media and Communications (CARIMAC). The Edna Manley College provides training in the visual arts, music, dance, drama and education and liberal studies, all of which are relevant to the film industry. It provides from certificate to Bachelor’s degree programmes in these areas. The college has developed a high level of proficiency and expertise over the years. The college aims to provide a stimulating academic and physical environment to enable students to hone their craft and pursue the highest levels of research, practical skills and general academic excellence. Importantly, the college promotes partnership, collaboration and networks to support the development of the arts. In addition, the college motivates graduates to be leaders in their fields and embeds its training in a wider socio-cultural understanding of the Caribbean societies (EMCVPA, 2017). This historical and sociological vision is important as a source of creative ideas and innovation that can lead to the development of unique creative products and services that can compete on the local and international markets.

Having started in 1974, the Caribbean School of Media and Communication (CARIMAC) has long experience in providing training in mass communication. Indeed, the Institute is regarded as one of the stand-out success stories of the UWI system having established a reputation for consistently high quality, and practical training. The School was rebranded in 2017 with a change in its name and focus in some areas. The change entails a shift from a school of journalism to one that also trains students in public relations, marketing, animation, film and television.

Indeed, its programmes have been upgraded in recent years to provide more relevant training to meet the needs of media practitioners. Courses now include a Bachelor of Arts in Mass Communication and a Master of Arts in Communication and Social Behaviour Change. In anticipation of modern trends, a bachelor of fine arts in animation was introduced in 2015 with a focus on 2D and 3D animation and motion graphics, all of which are vital for today’s filmmakers. As part of its rebranding, CARIMAC plans to introduce new programmes including a Masters Degree in Media and Management and courses in social media marketing and sports commentary and analysis. Crucially it also plans to strengthen its networking and exchange programmes with international universities and media institutions. This will

enable it not only to attract foreign students, but to leverage the expertise, technology and management skills of media and communication houses which have a global reach.

The Media Technology Institute (MTI), which was established in 1984, provides practical training for media practitioners in the technical and production skills to ensure international standards are met in the local media. MTI provides high class courses in videography, audio engineering, voice and speech, digital design, and digital graphics and animation. The focus on enabling students to ‘do it themselves’ at the Institute means that their entry hurdle to the world of work is significantly reduced. Therefore, there is a high demand for graduates of MTI in the Jamaican and regional media.

2. UWI Community Film Project: the way forward

The Film Project has truly come of age and is having a transformative effect on the youths of the underserved communities that are represented. The project could be described as a sustainable project that is achieving a triad of objectives: student training and skill empowerment for employment; telling the stories of the communities to project a better image of their possibilities and improving student self-confidence, self-esteem and assurance that they can accomplish their goals once they are prepared to make the necessary sacrifice.

Nevertheless, the Project needs to continue to expand across other communities in Jamaica. This would provide the basis for the development of true community film ecosystem in the country, thereby helping it to achieve critical mass that could spawn a few very good new filmmakers. However, this would require a scaling up of financing for the Project. Therefore, a case could be made for a continuation of government financing under the JSIF project, supported by the private sector.

Box 3

Justine Henzell of “The Harder They Come” still going strong

Justine Henzell is an independent film producer and oversees the legacy of *The Harder They Come*, the award-winning movie, co-written, produced and directed by her father, Perry Henzell, which continues to reach a global audience 45 year after its release. A feature film sequel and a stage musical for North America are currently in development.

Henzell has directed two feature length documentaries highlighting the history of Jamaica. “OnePeople-The Celebration”, celebrated Jamaica’s global reach in her 50th year of independence and premiered on 6 August 2012 across Jamaica as part of the official Independence celebrations as well as at BAM (New York) and O2 in London to tremendous acclaim. Her most recent documentary ‘Jamaica Arise’ chronicles the 75-year history of the People’s National Party which is the oldest political party in the Caribbean. Spanning 1938-2013 it shows Jamaica’s development from pre-independence to the current decade with all the achievements and obstacles that occurred along the way.

Henzell is passionate about nurturing emerging talent and so has formed the Creatrix Collective to produce content exclusively directed by Jamaican women. The most recent being the ‘Losing Patience’ web series created by Teeqs.

Henzell is also a founding member of the Jamaica Film & Television Association (JAFTA) Propella Initiative which supported the production of five short films by Jamaica filmmakers in 2016 and again in 2017, in partnership with JAMPRO and the CHASE Fund.

In addition to her work in film, Justine is a Co-Founder and producer of the Calabash International Literary Festival which was first staged in 2001.

In 2012 Justine was honoured to be named by the Private Sector Organisation of Jamaica and The Gleaner as one of the 50 under fifty Business Leaders Shaping Jamaica’s Future. Justine has served on many public-sector boards such as the Entertainment Advisory Board and the Jamaica Tourist Board.

Born in Kingston, Jamaica, where she still resides, Justine has two adult children, Drew and Dylan, of whom she is well proud.

Source: Jamaica Film and Television Association and JAMPRO.

F. Case study two – the film “Songs of Redemption”

The second case study focuses on “Songs of Redemption”, a documentary film that was produced by a national of Spain, Nando Guereta of Nice Time Productions. Nice Time Productions is a Jamaican-Spanish production company that is dedicated to professionally documenting, representing and exhibiting in film and music the significant cultural and sports creative talent and achievements of Jamaicans (Thinking Nomads, 2014). The film was dedicated to the work of Italian activist Carla Gullota, whose NGO ‘Stand Up for Jamaica’ undertakes a number of practical projects to rehabilitate inmates in the country’s prisons, to better reintegrate them into society after serving their sentences or to make the best of their lives for those serving life sentences. The initiative is part of new thinking in restorative justice aimed at getting prisoners to acknowledge their crimes, to encourage them to warn youths about the dangers of criminal activity and to rehabilitate them.

Songs of Redemption is a feature length documentary about inmates at the General Penitentiary in Kingston, Jamaica. Taking its title from Bob Marley’s hit song, the film documents the pathos and ethos of the struggle of inmates in the prison to come to terms with their lives in prison and to find redemption and rehabilitation through music. The film highlights an innovative programme for the rehabilitation of a number inmates. The rehabilitation programme was supported by the Minister of National Security, Commissioner of Corrections Prendergast and Superintendent Fairweather and the programme allows inmates to develop their musical skills and to use music to deal with issues of forgiveness and redemption. As Pires (2013) noted, ‘Songs of Redemption’ tells the story of ‘bad’ Jamaican men who create good Jamaican music and find, in the process, their own redemption”. The crew for the film consisted of three Jamaicans and three Spaniards. One Jamaican was hired to undertake the backend office or administrative work. Nice time Productions paid the inmates for the music they recorded for the film.

The documentary was filmed on location at the General Penitentiary. The producer met with the inmates, got to know them and filmed their life stories. A representative group of inmates were chosen based on their life stories, musical talent and the plot that the producer wanted to convey.

By the standards of feature films in developing countries, Songs of Redemption has been quite successful. The film has won a number of awards, including the 2014 Kracow Film Festival in Poland’s best documentary music film, winner of the 2013 Pan African Film & Arts Festival Los Angeles- Best Feature; winner of the 2013 Caribbean Tales Toronto Film Showcase- best documentary; winner of the Africa World Documentary Film Festival – best documentary. The film has also won the Trinidad and Tobago Film Festival-Best Feature Documentary Film and People’s Choice Award, the Cinedoc Tbilisi film Festival- public award and the Barranquilla International Film Festival- Special Jury Mention.

1. Critical success factors

The critical or key factors that contributed to the success of the Songs of Redemption Film, which are instructive for other similar feature film producers in Jamaica and the wider Caribbean are as follows:

a) A strong and relatable story line

Strong script writing based on a good plot or story is a key pillar of a good film. A good, relatable story has been a key factor driving the success of Songs of Redemption. As producer Guereta has noted, the film provides another view of prison life to the public. He highlighted that the general public often has a perception of prison life that is derived from watching movies. This view often portrays prisoners as mean individuals working out in gyms, forming gangs and creating trouble for the prison authorities. However, reality is often quite different from this stereotype. Indeed, he noted that most inmates often feel lost and are in fact just trying to survive as best as they could in a hostile environment.

This counter narrative, which also highlights that the inmates are often also victims, along with the victims of their crimes, provided the plot for an appealing story. Furthermore, the film deals with issues of rehabilitation, redemption and restorative justice, which have often been met with mixed reactions in Jamaica, but are seen as an important part of prison and criminal justice reform in many countries. The use of captivating interviews with inmates combined with original reggae music that is created and performed by the inmates, wardens and local producers were important in driving the appeal

and demand for the film, especially in international markets (YouTube Trailer for Songs of Redemption Film, 2013).

b) A production company with experience in the market

Songs of Redemption was produced by a well-established Jamaican production company, with international experience ‘Nice Time Productions Limited’. The company has its headquarters in Jamaica, but has representatives in the wider Caribbean, North America and Europe. It was established and registered in Jamaica in 2009. Although the company is primarily focused on producing films, its portfolio also includes music production and management, events promotion and sports management (About Us-Nicetime Productions Limited, 2017). The company also supports young people in acquiring education and training in the arts and sports.

Nicetime Productions also has two other leading feature films to its name: ‘Hit me with Music’ and ‘Why Jamaicans Run so Fast’ both of which have been produced by Director Miguel Galofré. The first is a documentary on the evolution of Jamaica’s dancehall music with a strong focus on the career of Yellowman, a leading early artist. Similar to Songs of Redemption this documentary is filled with revealing interviews with dancers, street children and some of the biggest stars in the dancehall music business (Caribbean Creativity, 2012). The second, tries to explain the basis for Jamaica’s sprinting success in the Olympics and other competitions. It features interviews with Usain Bolt and other medal winners and provides unique stories of the struggles and triumphs of the athletes- all infused with lively Jamaican music.

c) An appropriate financing model

Similar to other small independent film companies, Nicetime Productions confronts financing challenges. Nevertheless, the company has been able to undertake self-financing for its projects as they do not exceed the company’s internal financing capacity threshold. A good documentary film in Jamaica might cost US\$35,000 to \$40, 000 or more and often film companies have to finance such a production from their own resources, while a higher end one might cost in excess of US\$70,000 (interview with Nicetime Productions representative). Indeed, most film makers deem the use loan financing for documentaries and short feature films to be uneconomic as the relatively small domestic market and high quality required to penetrate the international market for these types of films mean that film makers might not recoup their expenses.

d) Marketing and distribution strategy

Film marketing and distribution is probably the most dynamic and disruptive part of the industry’s value chain. Nicetime Productions is in tune with the changing trends in film marketing and exhibition and strives to use as many distribution media and platforms and also varying price points depending on effective demand for a given film in different market segments. Nicetime Productions markets its films, including Songs of Redemption through digital downloads on its website for a reasonable fee. The company has also started to use other digital media including Amazon, Vimeo and others to reach a larger audience. Nevertheless, marketing through these channels is relatively expensive, with costs for subscriptions on some platforms ranging from US\$2,500 to US\$3,000.

The company also has a presence on other social media networks such as Facebook and YouTube, where people can learn about the company and what films it is in the process of producing. Further, YouTube trailers, provide publicity for their films and direct viewers to sites where they can purchase downloads of the films. In a novel approach to exhibiting its films, the company negotiates with universities in the United States to screen its films for a reasonable cost to the University of around US\$300. This approach is well suited for informative documentaries, which could be a part of class curriculum. It is expected that films such as ‘Songs of Redemption’ and ‘Why Jamaicans Run so Fast’ would attract a university audience.

e) Contracts based on publicity

The success of Songs of Redemption through awards and acclaim has opened opportunities for the company to be contracted to do other documentaries. This is important because the commercial margin for these types of films is quite small, with many companies failing to make a profit after meeting cost obligations. Therefore, contracted work is often a quite useful avenue for low budget film makers to

make some money, a portion of which could be ploughed into their own productions. Since “Songs of Redemption”, Nice time Productions has been commissioned to do a number of documentaries, including ‘Tell the Children the Truth’ for Tammy Hart Productions, ‘Living in Waterhouse’ for the Peace Management Initiative (PMI), ‘Paddling Spirit’ for Jamaican artist Laura Facey and also another project dealing with conflict resolution. Further, the company is also planning to film a second part of Songs of Redemption involving new inmates who have joined the Prison Rehabilitation Programme.

Box 4

JAFTA Propella: a good take-off

The Jamaica Film and Television Association (JAFTA) is a non-profit organization that is committed to the development of the film and television industry in Jamaica. Specifically, the organization works to document and share data on the industry, identify growth opportunities in the sector and to assist in building capacity by providing training and mentorship to budding talent. The organization provides international networking opportunities for filmmakers and avenues for them to enter local film competitions, with an eye on exhibiting the best productions at film festivals.

In 2016, JAFTA, in partnership with JAMPRO and the CHASE Fund launched the Propella Initiative, which provided five local filmmakers with J\$500,000 each to produce a short film. Funding for the project came from the CHASE Fund, which provided a grant of J\$2.5 million for the production of the five short films, and from JAMPRO which underwrote J\$3 Million in capacity building and market attendance for the delegation at international film festivals. The initiative turned out to be quite successful, with the five films selected premiering at the Trinidad and Tobago Film Festival in 2016 and 2017, and the cohorts attending the Toronto International Film Festival and the Clermont Ferrand International Film Festival. The films spanned the range of genres from drama to sci-fi.

The plan is to make JAFTA Propella an annual sector development initiative in order to provide a production and exhibition outlet for talented Jamaican filmmakers, in recognition of the difficulties along the value chain.

JAFTA also facilitates practical training and mentoring for filmmakers. Earlier this year it participated in a British Council script writing workshop in partnership with JAMPRO that was facilitated by Ludo Smolski, a script development consultant and lecturer at the National Film and Television School (UK). The workshop provided guidelines on how to create strong screenplays through the analysis of script structure. JAFTA coordinated the open call process in Jamaica and 15 participants were selected, following a rigorous selection process, by a 3-member judging panel represented by the British Council, JAFTA and JAMPRO.

Source: Jamaica Film and Television Association and JAMPRO.

G. Legends of Ska

The idea for the documentary idea occurred to filmmaker Brad Klein on 30 December 2000, moments after doing a live telephone interview on a Ska radio programme on KUOM-FM with the first star of Ska, Mr. Derrick Morgan. It was Klein’s fourth radio interview with a Jamaican foundation artist and this one had gone particularly well. Back then, it was just after the astounding success of the Buena Vista Social Club (BVSC) and right before Ken Burns’ 14 part series, *Jazz*, was about to air on Public Television in the USA. After the conclusion of Morgan’s interview, Klein turned to a fellow deejay in the studio and said “when is someone going to make a film on the music we love?” At that moment, he realized that he was the person to do the film.

With an amazing rush of energy and purpose, he returned home from the radio station to comb through the collection of 33, 45 & 78 rpm records. He had been a record collector, a teacher on the history of Jamaican music at the University of Minnesota and a Reggae disc jockey for 20 years, but knew nothing about making a film. In those first few days, the film came together in his mind and he never wavered throughout the 15 years working on it. Using the BVSC as a model, Klein set out to put together a reunion concert with as many original Ska artists as possible. That concert would become the spine of the film, while chronologically telling the history of the new island nation and the music that emerged with it. In-depth stories on the various singers and musicians would surround the songs of the original Ska period, in turn informing viewers how everything came together during the early 1960s.

In 2001, Steady Rock Productions, LLC was established as the production company for the film. With the assistance of two attorneys, the team assembled a Private Placement Memorandum and an Operating Agreement, in order to attract accredited investors. A potential investor packet was assembled, which included a one inch thick, full colourful booklet created on what the film was going to be about, who would be in it and a concise history of original Jamaican Ska. Also included was DVD of the BVSC and the CD ‘Hog in a Cocoa’, featuring many great Ska songs from the early period.

One early mistake made as a first-time producer was underestimating the cost of raising money. Initially the project was pitched to 50 wealthy individuals who were known in some phase or other of Klein’s life. Each of those packets cost over \$100 to produce and much to my surprise, not one of those 50 people chose to invest in the film. None of them had any previous connection with Jamaica. They only knew Klein or his parents from long ago. To this day, Klein is still seeking investors.

Regarding the production, assembling everyone and piecing together the All-Star Skatalites Orchestra for the concerts was a highlight. Although cancelling the initial concert was initially a setback that turned into a blessing. The original date for the concert was 22 September 2001 at the House of Blues on the Sunset Strip in Los Angeles. Considering the idea for the film had only come nine months earlier, it did not allow enough lead-time for having everything coordinated properly. Two things contributed to having the event rescheduled:

- A lack of sufficient funds to pay for the entire event.
- The September 11 terrorist attack.

Raising money for the production has been an ongoing struggle since its inception and continues to be a hindrance to this day. Klein had raised capital from two independent sources other than himself and had commitments from two others. But he knew it was not going to be enough. Then the world changed on 11 September 2001 and he had to postpone the event. No one in America was in a party mood and Klein knew immediately how difficult it would be at that time to get a large group of ripe Jamaican musicians from around the globe through U.S. customs and immigration.

Cancelling the concert after the events of 9/11 afforded the opportunity to regroup, buy more time and give one more chance to try again. By mid-November 2001, another investor had agreed to put in \$50,000 USD, and Klein immediately started planning another concert date. Finding a time when the members of the Skatalites band were available was key, as we needed as many of the original members as possible to perform. Authenticity was the driving force and between 10-14 July 2002 became the new event dates.

The main factor/(s) that contributed to the success of the film in Klein’s opinion were as follows:

The content (history, singers, musicians and the story), plus his never ending push to complete the film. According the Klein, the film is still incomplete with it being roughly 98 per cent done. A final sound mix and ending credits are still to be determined. Klein maintains he is still pitching the film to financiers, hoping to raise the finishing funds in order to have the film broadcast and released to the public. Before that can happen, synchronization rights must be cleared for the last ten songs from two music labels. Until that time, the “success of the film” is still in the balance. However, Klein remains buoyed by Winston Churchill proclamation - “Never, Never, Never Give Up.”

The film has contributed to employment, especially youth employment and it has done more for youth education than employment, though not enough young people in Jamaica have viewed the film, over the last two years, the film has screened in Europe, North and South America, and parts of the Caribbean at numerous film festivals and special screenings, garnering three awards. Klein hopes that it will be broadcast to the nation on Television Jamaica (TVJ) sometime in the near future, but that cannot occur until the outstanding synch rights have been obtained.

With respect to the use of modern ICT technologies such as digitization, social media, crowd sourcing of inputs and finance, Klein noted that a mix of these technologies have been used. For instance, movies from the 1960s have been digitized so that they can be edited into the film, Facebook and the Legends of Ska website has been used, despite the cost maintain audience interest. Also, two kick

starter campaigns were launched with \$15, 500 pledged out of a goal of \$50, 000 (Interview with Klein, June 2017).

According to Klein, *“everyone has a different idea of success, though most of society focuses on financial returns. I tend to focus on how far the project has come since its inception, the quality of the work, the importance of documenting the early musical history of Jamaica and what still might happen in the future.”* Klein still plans on releasing the film, a CD/LP soundtrack, a coffee table book featuring the four days all the artists were together in Toronto and possibly a tour featuring Ska singers and musicians from all the genre’s generations.

H. Prospects for value-added across value chains: film and music-based tourism

Apart from their contribution in their own right, music and film can strengthen intersectoral linkages with tourism and other sectors. In an effort to diversify and revitalize their tourism product, a number of destinations have ventured into creative tourism. According to Campbell (2017), creative tourism provides visitors the opportunity to pursue a creative activity, including arts, crafts, music, learning about a film and a cookery workshop, while staying in good quality accommodation. It therefore enables tourists to connect with the local communities in a destination and therefore increase the spillover benefits from tourism. Further, as Campbell notes, creative tourism is an area of increasing demand in world tourism. This stems from the fact that many tourists now want to be ‘prosumers’ (both producers and consumers of a tourist experience). Also, it tends to boost word of mouth advertising of a destination because of the embedded, authentic experience that the tourist gets in the destination. Given its abundance of natural beauty, talent and creativity, Jamaica should give greater emphasis to creative tourism to renew the sector.

Music festivals such as Sumfest and Rebel Salute already attract a significant number of tourists to Jamaica. Jamaica needs to provide space for tourists to participate in its festivals, culinary arts, dance, fashion and other cultural experiences to create high value-added experiences for the tourists that could increase spending in the country. For instance, this could include organized visits to the sites of early music production and locations where major movies were filmed in the country.

III. Recommendations to facilitate the development of a more successful music and film industry in Jamaica

General research and the case studies point to the importance of a strong value chain, supported by specific clusters to the success of the music and film industries in Jamaica. Further in the case of Jamaica and the wider Caribbean, the wider value system or global value chains are important as music and film today are often based on collaborations that bring together disparate talent and expertise from different countries. However, these are not enough, as these creative activities are embedded in a wider institutional and policy framework, which can either facilitate or impede their competitive development. Broadly, Jamaica and the wider Caribbean need to tackle supply side or productive development, demand side, public policy and institutional bottlenecks to accelerate the development of a more competitive music and film industry. The following recommendations are proposed based on research, interviews and the survey of stakeholders in the music and film industries in Jamaica:

A. Strengthen the weakest links in the music and film value chain

The consensus among the music experts both from individual interviews and the JAMPRO Stakeholders Forum was that song writing and artist management at the front-end and marketing and distribution at the back-end were the two most important bottlenecks in the industry. These are the low-hanging fruit areas that need to be prioritized for action to advance the development of the industry. Jamaica therefore needs to develop an upgraded training programme in music writing. The quality of one's song has become even more important in a digital marketplace where hundreds if not thousands of musical content are uploaded to the web each day; all fighting for the attention of the listener. At the back end of the value chain, music practitioners need to rethink music distribution, marketing and exhibition. This

should begin with careful research on what mix of traditional platforms and digital platforms that are best suited to the industry.

Similarly for film, script writing at the front-end and marketing and distribution at the back-end were the two most important supply side bottlenecks in the sector. Jamaica therefore needs to develop an upgraded training programme in script writing. The programme should be hands-on with a good mix of theory and practice. The leading agencies engaged in promoting film, including JAFTA and JAMPRO could develop an exchange programme and invite leading script writers in major markets such as the United States, UK and India to collaborate with local script writers to put on workshops in Jamaica for as low a cost as possible. In particular this could be promoted through JAFTA Propella, as has been done with GATTFEST.

At the back end of the value chain, film makers need to rethink film distribution. This should begin with careful research on what mix of traditional platforms such as the use of cinemas, film festivals and digital platforms are best suited to the industry. A first requirement is legislation, regulations and an incentive framework that facilitate the distribution and exhibition of Caribbean films in local and regional cinemas and television. This should entail proper systems for cataloguing and licensing films to distributors in different member countries. Harmonised legislation in this area would reduce costs and facilitate consistency and dispute resolution. Further a multi-mode approach to distribution and exhibition should be undertaken, including cinema releases, DVDs and CDs, live streaming and Blu-ray among other formats. This will not only provide a wider range of options for film distributors, but would better match the increased sophistication of the regional consumer.

Importantly, the regional Diaspora should be viewed as a logical extension of the region in the marketing and distribution of music and film and other creative content. Nascent channels exist where members of the Diaspora can purchase or stream some film and music content, such as purchases while on vacation and informal networks in North America and Europe. However, there is need for the development of formal distribution and exhibition channels to capture a larger share of the Diaspora market for Jamaican and wider Caribbean content. Regional music and film producers, commissions and policy institutions need to research what scope exists for co-distribution arrangements with Indie and feature film distributors in major markets. Indeed, the Diaspora market should also be leveraged as a testing ground to reach the wider market in metropolitan countries.

With respect to festivals Caribbean musicians and film makers need to choose the most appropriate festivals to screen their films to maximize publicity and marketing potential (Aft and Renault, 2006). This would depend on the cost of entry, but factors such as the publicity that could be gained and the ability to network with other film makers and potential co-producers should also be considered.

B. Develop a harmonized policy approach towards content requirements

The audiovisual sector, including is one of the least liberalized under the WTO. This stems in part from members desire to balance the cultural and commercial aspects of the sector. The sector is a powerful force for projecting a country's unique culture and identity and members are careful not to allow market forces alone to guide its development. Caribbean countries in particular, owing to geography and history are especially prone to cultural penetration by the major audiovisual companies from the United States and Europe. The time has therefore come for the subregion to design a balanced industrial policy framework that includes local content requirements for domestic radio and television and well-targeted subsidies to nurture the development of its music and film sectors.

C. Strengthen the other components of the value chain and network

Although the greatest priority should be given to remedying the weakest links in the value chain, the other components of the chain also need to be strengthened. The main competitive advantage of the region in music, film and other creative activities remains ‘raw talent’. However, as the deteriorating performance of the West Indies cricket Team⁹ has shown talent alone is not enough to achieve success. Talent must be harnessed, upgraded and professionalized to become competitive. Music and film production in Jamaica and the wider Caribbean needs further investment to upgrade the quality and consistency of output. Currently, a wide gap exists between the leading producers and those with less experience and expertise. Policy should develop a strategy to narrow the gap in expertise between these two groups. This would enable the region to achieve a minimum critical mass of competence in the industries.

The skills upgrade for film makers could be facilitated by training programmes such as the BA in Film that is offered by UWI St. Augustine. UWI should move to introduce a Master degree programme (MA in music and film). However, this should be supported by practical apprenticeship programmes with experienced regional and international musicians and film makers. Jamaica should strengthen film incubation initiatives that provide a one-stop-shop for a package of inputs and services and the right culture to help film start-ups to succeed. Initiatives are currently being undertaken by the JAFTA Propella, the Making Development Work Initiative with the British Council and the Business of Sustainability for Studios (BOSS Project) under the auspices of JAMPRO and the World Bank. These and other incubator initiatives could provide affordable space, hands-on technical training, shared equipment, access to financing, mentoring and networking opportunities (Small Business Trends, 2017).

D. An innovative approach to film financing

Financing has been noted repeatedly as the single most important constraint to the development of more high quality music and feature films in Jamaica. This results in part from the high levels of uncertainty as the likely commercial success of these ventures. Most films, for instance, do not make money. Therefore financial institutions and equity investors are usually not inclined to finance films without a range of risk mitigation guarantees. In addition, the pre-sale model is not really an option in the region. Jamaica and the wider region need to come up with an innovative hybrid model to provide more affordable and sustainable for domestic film makers. Given the market failure in music and film financing it is proposed that public private partnership arrangement should be designed so that government could share some of the risks of financing films. Caribbean governments should consider creating a ‘Regional Film Production Fund’ with part financing from the government budget, a tax on the sale of cinema tickets¹⁰ and cable TV providers and contributions from the private sector- a portion of which could be written off by a tax credit, which is based on the amount contributed. The Film Commission of Jamaica has submitted a proposal for a Film Fund to assist in financing film projects.

E. A distribution model for the digital age

Music producers and film makers in Jamaica and the wider Caribbean need to develop a modern film distribution model that matches the digital age. To do this effectively players in the industries need to undertake their own market research to gauge which distribution platforms are optimal for their productions. Market research will provide the information for a targeted distribution model, which is especially important given the limited resources available for spending on distribution. Nevertheless, it is anticipated that a mix of traditional and new digital platforms will produce the best distribution model. Filmmakers, for instance, should continue to focus on maximizing their earnings from local cinema

⁹ See Tim Wigmore (2016)- “West Indies Cricket talent is there- now reform needed to cultivate it”

¹⁰ The idea for the tax on the sale of cinema tickets was gotten from film producer, Franklyn St. Juste of Jamaica.

showings and regional and international film festivals. Of necessity this should be underpinned by better quality productions that are in line with consumer demand, especially given the intense competition and influence on consumer taste and preference from the Hollywood majors. Indeed, domestic film makers would need to pay attention to the timing of the releases to avoid head-to-head competition with prime time release of these majors¹¹. Caribbean music and film makers also need to better exploit international niche markets for their films.

F. Leverage the regional market and international trade agreements

Presently the regional market is not being well leveraged to promote cross-border trade in music and films. The situation is better for music than film, but even musicians still complain of the difficulties in moving and performing across the region, despite the CSME protocol on free movement. In the case of film, producers find it very difficult to exhibit even high quality films that have done well in their home country across the region. It is recommended that the region create a harmonized legislation and an incentive framework to facilitate cross-border production, trade and exhibition of regional films. This would not only expand the market for domestic films in the region, thereby allowing film makers to benefit from economies of scale but would also provide an important testing and proving ground to enter the global market.

G. A modern intellectual property regime

The different intellectual property management agencies in Jamaica need to strengthen their rights management regime. Critical areas of focus should include, improved arrangements for collecting rents for use of music and film works in foreign countries. This requires stronger reciprocal arrangements with rights bodies in these countries. Moreover, copyright law need to keep abreast of rapid technological changes which allow users to create more novel methods of piracy. Enforcement of piracy laws in Jamaica itself is essential, as artists lose significant revenues to piracy.

H. An up to date creative industries information system

A creative industries information system should be developed at the regional level. This should be an integrated system with an E-registry of participants disaggregated by sex in the sector, data and information on the subcomponents of the sector such as music, film, fashion, arts and craft and design. In addition, statistical divisions in the region should set out a programme to better measure and capture the contribution of the creative sector to GDP and trade. This should be complemented by developing indicators of performance and competitiveness in the sector that are in line with measures that are being undertaken at the global level to enable comparison. The Statistical Institute of Jamaica (STATIN) currently compiles some data on the sector in its 'other services' category, but a well-designed programme is needed to capture accurate up-to-date data on the sector.

I. A youth apprenticeship programme

Given the high levels of youth unemployment- in excess of 25 per cent in some countries, Jamaica and other countries should develop a strong creative industries youth entrepreneurship programme. This should include the use of creative incubators to provide targeted business skills and management training for youths who are interested in making a living in the sector. Incubator training should be supported by on the job training with creative enterprises so that youths can gain real world experience to help them develop their own businesses. The World Bank has funded the Jamaica Youth

¹¹ The Hollywood majors often make major releases during the summer and Christmas seasons to maximize audience attendance (Simonton, 2009)

Employment in Digital and Animation Industries Project in the amount of US\$20 million. The project aims to create an enabling environment and to spur youth entrepreneurship and self-employment in the digital and animation industries in Jamaica.

J. A comprehensive policy framework

Development moves within the sectors have to be supported by the implementation of both national and regional incentive schemes through a comprehensive policy framework. Importantly, this has to be done in the context of a governance structure that is cognizant of safeguarding national cultural heritage and enshrined in a management mechanism that corrects the concerns in Jamaica even at the ministerial level where there are currently six primary and six supporting ministries with varying levels of portfolio responsibility for the cultural and creative industries.

IV. Conclusion

Jamaica has long been known for its creativity and innovation in music. The industry has evolved from its inner city communities to achieve world acclaim. The music industry remains an important contributor to employment and incomes for artists and support personnel. As exemplified by the case studies, a number of artists and ventures have developed professional music services and studios that have been successful in their own right. Despite a long history, the Jamaican film subsector has not achieved the level of success of its music counterpart. This has stemmed in part from a heavy policy focus on attracting foreign on-location films, more so than developing the domestic film industry. However, this is changing with a renewed focus on nurturing local talent and professionalizing film training.

The consensus of experts in the music and film industries is that there is significant potential for increased growth in them. However, to realize their full potential, they will have to tackle a number of constraints along their value chains. Important among these are improving song writing and artist management in music and script writing and distribution in film making. Also, local content requirements should be considered to assist local content producers with distribution. However, minimum quality standards should be established for content to promote demand by the public. Innovative financing is also needed given the shortage of affordable finance in the subsectors. Crowd funding, public funding; and venture capital where feasible should be considered as sources of finance and it is important to identify any kind of barrier faced by female producers in accessing these financial services.

Furthermore, a new distribution model is needed that takes account of the digital disruption that has been taking place in the industry. Music and film makers need to develop a distribution system that gives greater priority to on-line streaming, video on demand and other platforms to distribute their products. In addition, they need to strengthening linkages with global value chains, through better networking and collaborations with international artists and studios. These could provide a foundation for growing their market share in international markets.

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