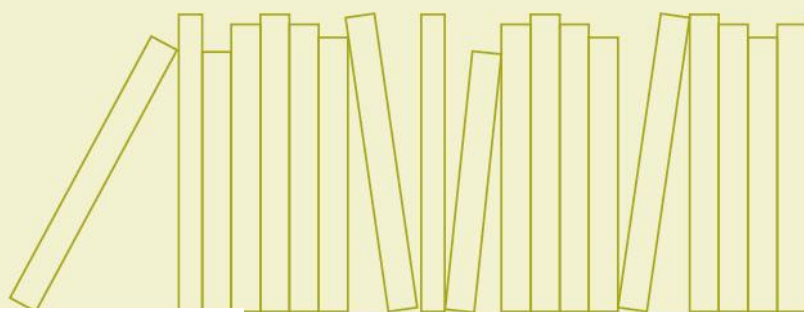


Economic Commission for Latin America and the Caribbean

**ECLAC SUBREGIONAL HEADQUARTERS
FOR THE CARIBBEAN**



Report of the expert group meeting on the Music and Film Sectors in Jamaica



UNITED NATIONS

ECLAC



UNITED NATIONS



**Economic Commission for Latin America and the Caribbean
Subregional Headquarters for the Caribbean**

Expert group meeting on the Music and Film sectors in Jamaica
4 December 2017
Port of Spain, Trinidad and Tobago

LIMITED
LC/CAR/2017/22
28 December 2017
ORIGINAL: ENGLISH

REPORT OF THE EXPERT GROUP MEETING ON THE MUSIC AND FILM SECTORS IN JAMAICA

This report has been reproduced without formal editing.

This document was prepared by Michael Hendrickson, Economic Affairs Officer, Economic Development Unit, ECLAC subregional headquarters for the Caribbean.

The views expressed in this document, which has been reproduced without formal editing, are those of the author and do not necessarily reflect the views of the Organization.

CONTENTS

A.	SUMMARY OF RECOMMENDATIONS	2
B.	ATTENDANCE AND ORGANIZATION OF WORK	2
1.	Place and date of the Expert Group Meeting	2
2.	Attendance	2
3.	Agenda.....	2
C.	SUMMARY OF PROCEEDINGS	3
1.	Opening of the meeting	3
2.	Overview and presentation of the study	3
3.	Plenary discussion	6
4.	Closing remarks	7
Annex I	List of participants	8

A. SUMMARY OF RECOMMENDATIONS

1. Focus should be placed on strengthening the weakest links in the value chain through improved training in song writing in music and script writing in the film subsector.
2. Develop a harmonized policy towards content requirements that reserve time slots for local content to be featured in the local media.
3. Since the small population in the Caribbean limited the consumption of media content, the region needed to export to reap the benefits of economies of scale. Therefore, the region needs to develop an effective export strategy that is targeted to particular markets, uses appropriate distribution platforms and that is linked to international value chains.
4. Develop innovative financing mechanisms such as angel investing, venture capital and crowd funding that might be better suited to the project based nature, high risk and uncertainty that are involved in creative production and distribution.
5. Upgrade the intellectual property regime to reduce loss of income through inadequate reciprocal arrangements with foreign rights management agencies and through piracy.

B. ATTENDANCE AND ORGANIZATION OF WORK

1. Place and date of the expert group meeting

6. The United Nations Economic Commission for Latin America and the Caribbean subregional headquarters for the Caribbean convened an expert group meeting to discuss the findings of the study “Lessons from Successful Case Studies of Music and Film Ventures in Jamaica” on 4 December 2017 in Port of Spain, Trinidad and Tobago. The meeting was conducted mainly via WebEx.

2. Attendance

7. Representatives from the following institutions participated in the EGM: The Institute of Caribbean Studies, UWI, Mona, Culture and Community Development Division, CARICOM, the Cultural Studies Division, UWI, Mona, the Faculty of Humanities and Education, UWI, St. Augustine, the Centre for Tourism and Policy Research, UWI, Mona and Creative TT, Trinidad and Tobago.

8. The meeting was chaired by the Coordinator of the Economic Development Unit (EDU) of ECLAC subregional headquarters for the Caribbean. The Economic Affairs Officer in the EDU and an ECLAC consultant who co-authored the study presented its findings.

3. Agenda

- Welcome remarks and introduction
- Background and presentation of the study
- Plenary discussion on presentation and study
- Closure of the meeting

C. SUMMARY OF PROCEEDINGS

1. Opening of the meeting

9. The Coordinator of the Economic Development Unit welcomed the participants and gave opening remarks to frame the context of the expert meeting. He noted that ECLAC had been undertaking research and analysis that could inform the debate on economic diversification and structural transformation in the Caribbean. The initial round of studies focused on the services sector - a key pillar of growth in the subregion - and included de-risking and the financial services, as well as the offshore medical services sector. He noted that within the services sector, the creative industries provided a good opportunity for aiding in the diversification of the economies of the subregion. The Coordinator indicated that, although the background study focused on Jamaica, it provided recommendations that were applicable to other countries of the Caribbean. Overall, he noted that the wider aim of this and similar research was to suggest ways the subregion could strengthen the competitiveness of its exports and move away from being mere price takers in international trade.

10. The Economic Affairs Officer of the Economic Development Unit then welcomed participants and provided a brief background to the study. He noted that a determination was made to focus on success factors to determine what the cases were doing right which might provide lessons for start-ups and even established firms/ventures. He called on the participants to engage fully in the discussions, the outcomes of which could provide recommendations to improve the study.

2. Overview and presentation of the study

11. The ECLAC Consultant presented on the music sector in Jamaica. She noted that Caribbean governments needed to develop better data systems for the creative industries to enable better diagnostic analysis of the sector. Improved data are a precursor to better measurement and understanding of trends in the sector. She then provided an overview of the music industry in Jamaica.

12. She noted that the consumption and production patterns of Jamaican music had changed radically over the years partly due to changes in technology and consumer taste. This resulted in reduced income generation for many practitioners in the sector.

13. The presenter highlighted that the designation of Kingston as a UNESCO Creative Music City in 2015 provided an opportunity to showcase the country's music even more than before and also to increase the commercial value of the industry.

14. With respect to financial returns from the industry, the Jamaican Association of Composers, Authors and Publishers (JACAP) disbursed US\$56.7 million in royalties in 2016, an increase of 45 per cent over the 2015 figure. Other organizations had also witnessed an increase in earnings, owing to greater awareness, compliance and improved collection capabilities of the rights management agencies.

15. It was noted that the digital revolution presented both costs and opportunities for the music industry in Jamaica. Digitization had affected the professional structure of the sector, with commercial studios being replaced by home studios and the use of laptops. Further, the number of independent selectors who travelled with a digital collection of music to play at events had risen. However, there were opportunities. Artists had more control over their intellectual property, which

allowed them to generate more revenue for themselves. Artists such as Chronixx, Jah 9 and Protoje are now able to improve their success through the use of digital distribution platforms. Moreover, the song was not the only product on sale, since artists now create unique value propositions around their lifestyles, tours and one-to-one conversations.

16. The presentation assessed the critical success factors behind two case studies: Tuff Gong International, a successful studio in a digitized music marketplace, and the Alpha Music Programme. Jamaican reggae superstar Robert “Bob” Marley founded Tuff Gong International in 1965. The studio evolved over time and is now a fully branded enterprise; a one stop recording agency providing full service recording CD and vinyl mastering and digital and physical distribution of music, among other services. Importantly, Tuff Gong International had become the exclusive licensed representative of two of the largest international music labels in the world – Universal Music Group and Warner Music Group.

17. The Consultant flagged an important concern that had been expressed by some of the leading producers in the industry – including Gussie Clarke of Anchor Studios – was that some artists remained as ‘forced ripe fruit’ who had not mastered their craft, owing to their failure to go through the process of apprenticeship under major labels.

18. The Alpha Music Programme was highlighted as an example of a successful music training programme. The programme was started in 1880 to provide musical education for gifted students. The institution has provided an incubator environment for students to mature with the aid of seasoned practitioners. It offered performance and technology training with an emphasis on the theory and practice of music. She pointed to other factors that contributed to Alpha Music Programme’s success, including a 24/7 live streaming service and its radio station that acquainted students with income streams and distribution platforms that were available. Leading programme alumni included Joe Harriot, Don Drummond and Grammy nominee Winston Foster.

19. The presentation also highlighted the contribution of stage shows or live music in Jamaica. It noted that the street dance and stage show were a vital component of the musical ecosystem in the country. The Consultant provided an example where Shaggy and friends would put on a stage show, with part of the proceeds being contributed to local hospitals. Nevertheless, outdoor music events had declined in 2016.

20. In addressing the way forward, the presentation noted that younger Jamaican music practitioners needed to embrace the cross-fertilization of Jamaican and other African diasporic music genres. Also, there was a need for music incubators that facilitate the development of formal primary to tertiary musical education and talent development, and the studio needed to be reclaimed as a key space in the creative process, including collective writing, ‘vibe-ing’, and apprenticeship.

21. The presentation on the film subsector gave a brief overview of the global film industry as well as in Jamaica, and provided a context before examining the success factors behind the case studies. It was noted that film was a central part of the creative industries worldwide, based not only on its commercial value, but also its ability to shape attitudes and behaviours. Globally, film earned US\$124 billion in revenue in 2016. The sector was being influenced by key trends, including deregulation, corporatization – driven by the profit motive – and digitization, which led to prosumers, persons who were increasingly both producers and consumers of content.

22. He pointed to Jamaica’s long history in film-making. Indeed, on-location films were made in Jamaica for over 100 years. For a long time, the emphasis on promoting foreign films drew attention away from local productions, but, more recently, the Jamaica Film Commission had been actively promoting and facilitating local productions in collaboration with agencies such as the

Jamaica Film and Television Association (JAFTA). He explained that the Film Commission facilitated producers along the value chain from pre-production to production. The Commission also aimed to promote Jamaica as a premier location for filming by assisting foreign productions with finding locations, getting incentives and negotiating co-production arrangements. The most iconic local film was *The Harder They Come*, which was produced in 1972.

23. In 2003, Stanbury estimated that there were some 20 companies actively engaged in film and video production. Meanwhile, in 2010, Jamaica had recorded over US\$16 million in business linkages between foreign projects and the local industry.

24. The presentation discussed the UWI Community Film Project (UWICFP) as an interesting case study of community filming. The Centre for Tourism and Policy Research (CTPR) at UWI Mona started the project in 2012, aiming to open employment opportunities for youths in at-risk communities, use filmmaking to invest youths with greater self-esteem and a more positive attitude to work and community life, and to contribute to the wider film aesthetic and industry on Jamaica. To date, 224 trainees¹ have graduated from the programme. Participants have been trained in areas from script to screen, including production, directing, costume and set design, distribution and exhibition.

25. A number of factors were critical to the success of the UWICFP. Important among them are the following:

- A broad community search for talent. This followed the critical mass theory, which implied that the wider the search for talent in this case, the more likely it was to find an exceptional talent.
- A hands-on apprenticeship-type training programme – this provided practical training that was configured to the needs of the students and led to networks of connection to help them further develop their craft. This provided them with the basis to undertake their own projects or set up their own small businesses in video production.
- A base financial model with funding coming from private sources, including the Grace Kennedy Foundation, the Office of the Principal at Mona, UNESCO, and the Jamaica Social Investment Fund (JSIF) in 2016.

26. The Greater August Town Film Festival (GATFFEST) had also been critical to the success of the project. The Festival helped to promote the short films that were done by students of the project and provided them with training and networking opportunities under the mentorship of international film experts. In addition, supporting institutions such as the Edna Manley College of the Visual and Performing Arts and CARIMAC had facilitated the project. Going forward, the UWICFP needed to be further expanded to other communities to facilitate the development of a wider community film ecosystem and to be supported by sustainable funding through the JSIF, for instance.

27. The second case study dealt with the *Songs of Redemption* film. The film was a documentary on the inmates at the General Penitentiary in Kingston. It centered around an innovative redemption programme aimed at facilitating the rehabilitation of inmates through music and stories. The film won the Krakow Film Festival award in 2014 and the Caribbean Tales award in 2013. The critical success factors behind the film include:

- A strong, relatable story, which showed inmates as victims, as were the victims of their crimes;

¹ This number includes 74 women and 150 men.

- An experienced production company – Nicetime Productions – which had acquired experience in filmmaking and had produced other films such as ‘*Why Jamaicans Run So Fast*’;
 - An appropriate financing model based on self-financing from savings;
 - A marketing and distribution model that incorporated digital distribution.
28. The study provided key recommendations for advancing the development of the music and film subsectors in Jamaica. These included:
- Strengthen the weakest links of the value chain, including songwriting in music and script writing and distribution in both subsectors;
 - Develop a harmonized policy toward content requirements so as to stimulate more and better quality domestic productions;
 - Develop innovative financing mechanisms that are better suited to the high risk and uncertainty in these creative subsectors. These could include venture capital where possible, angel investing and crowd-funding;
 - Develop a forward-looking digital distribution model and provide the relevant training for persons in the sectors to develop their own digital distribution systems.
 - Upgrade the intellectual property management regime to reduce loss of income through inadequate two-way arrangements with foreign rights management agencies and through piracy;
 - Leverage regional and international trade agreements such as the EPA’s Protocol on Cultural Cooperation to increase co-production and business-to-business contact that facilitates trade in creative products and services;
 - Create a Creative Industries Information System to provide harmonized data on the sector and indicators of performance.

3. Plenary discussion

29. A number of issues were raised in the plenary discussion, which could inform the study and also suggest areas of future work. The first phase of the discussion focused on the rationale for support of the creative industries. It was noted that the intrinsic value of the sector in terms of identity formation, cultural confidence and belonging was important alongside the sector’s commercial value. Further, issues of class and race were also critical to understanding the limited support for the sector by policy makers in the subregion. The discussion also suggested that the study of why firms fail was as important as assessing their success.

30. It was noted that there was a timing dimension to support an industrial policy, since subsidization depended on what stage of the industry a firm was. Therefore, support measures for start-ups would not be relevant for established firms that need to upgrade their operations to meet changing technology and demand.

31. It was suggested that it would have been good if the paper had included a case study on one of the enabling institutions. This could have provided some appreciation of the challenges faced by these institutions in providing support to creative firms and ventures.

32. With respect to subsidies and content requirements, the meeting noted that Canada was a good example to study. Canada offered soft money (tax reduction) and investment facilitation, and also had content requirements for music and film, which provided a distribution channel for its domestic producers.

33. It was also noted that the small population in the Caribbean limited the consumption of media content. It was felt that the region needed to export to reap economies of scale. However, the ability to export was constrained by the quality of some production from the region.

34. The meeting also suggested that some indication should have been provided as to how the case studies were chosen, and that it would have been good to have included a fully commercial case. One of the presenters noted the difficulty in getting information from persons in the subsectors - particularly financial data - and pointed to the limited response received from the survey instrument that was conducted.

35. It was noted that the study should have referenced the 2015 CARICOM Framework on the Cultural and Creative Industries, the Jamaica National Development Strategy (Vision 2030), and also the effort to establish a Creative Industry Management Unit in the region.

36. The meeting also noted that the cultural nuances of the film sector, especially its history as an elitist activity, had affected its operations and the information on activity in this subsector. It was also noted that other types of musical genres such as gospel and jazz were important in the region, and some focus should be given to those genres.

4. Closing remarks

37. The Coordinator of the EDU thanked the experts for their active engagement during the meeting, and noted that their input would be incorporated into the study as far as was feasible. The participants thanked ECLAC for the opportunity to contribute, and requested that ECLAC continue to undertake work on the creative sector in the region.

Annex I**LIST OF PARTICIPANTS**

Jamil Agard, Production Consultant, Creative TT. Email: jamil.agard@filmtt.co.tt

Ian Boxhill, Centre for Tourism and Policy Research, UWI Mona. Email:
ian.boxhill@uwimona.edu.jm

Hilary Brown, Programme Manager, Culture and Development, CARICOM Secretariat.
Email: Hilary.brown@caricom.org

Suzanne Burke, Lecturer, Cultural Studies, UWI St. Augustine. Email: imanitt.suzanne@gmail.com

Deborah Hickling, Research Fellow, Creative Economy Development, UWI Mona. Email:
Deborah.hickling@gmail.com

Sonjah Stanley Niaah, Institute of Caribbean Studies, UWI Mona. Email:
culturedoctor@gmail.com

**Economic Commission for Latin America and the Caribbean
Subregional headquarters for the Caribbean**

Sheldon McLean, Coordinator, Economic Development Unit. E-mail: Sheldon.Mclean@eclac.org

Michael Hendrickson, Economic Affairs Officer. Email: Michael.Hendrickson@eclac.org

Machel Pantin, Economic Affairs Assistant. Email: Machel.Pantin@eclac.org

Nyasha Skerrette, Economic Affairs Assistant. Email: Nyasha.Skerrette@eclac.org



Economic Commission for Latin America and the Caribbean (ECLAC)
Comisión Económica para América Latina y el Caribe (CEPAL)
www.eclac.org