



Final Report

SVG POLICY FRAMEWORK AND DEVELOPMENT STRATEGY FOR THE CULTURAL AND CREATIVE INDUSTRY

**Prepared for the Business Gateway Project of the
Centre For Enterprise Development Inc.**

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Executive Summary

Recent technological advances and freer international markets have created great opportunities for economic growth within the cultural industries. Like most developing countries however, St. Vincent and the Grenadines faces challenges posed by the digital divide, and limited access to education and information. Inadequate cultural industry infrastructure, training, access to capital, knowledge of markets and effective regulatory framework also stand in the way of development. In addition, weak copyright systems and enforcement contribute to the proliferation of piracy and prohibits adequate remuneration. The above factors do work against the realization of the potential benefits of freer movement of goods, services and capital.

The St. Vincent and the Grenadines Cultural and Creative Industry Policy Framework is complemented by and includes an accompanying Development Strategy, and is prepared within the context of global trends in cultural industries development. This document examines and makes recommendations on policy and strategy at the national, regional and global levels, and particular emphasis is placed on the recommended approach of UNESCO as exemplified by the Global Alliance for Culture and Diversity and the Convention on the Protection and Promotion of the Diversity of Cultural Expression. This document is also prepared within the context of the SVG National Export Strategy.

The consultations that informed this policy framework and development strategy also brought to the fore the need for decisive action to be taken by industry and government in order to address challenges, encourage new development initiatives, and support the enhancement of existing activities.

On the plus side, the findings revealed evidence of a professional and positive approach within the fashion sub-sector, which has already started to have impact overseas. The visual arts and

crafts subsector, as well as the music subsector also show tremendous potential for growth and increased employment, based on the large numbers of already active and enthusiastic participants in these sub-sectors. Skilled and experienced artisans and designers from SVG have also been making an impact in the training of mass bands in St. Kitts, Anguilla, and Antigua, and the overseas success of music performers like Kevin Lyttle and Mattafix opens doors for others to follow. These are all positive accomplishments and circumstances that set the stage for further expansion of economic activity.

On the negative side, the lack of appreciation of the value of intellectual property rights poses a serious threat to further development of the arts. Piracy is rampant and there seems to be no anti-piracy activity. There are reports that criminal prosecutions for piracy under the Copyright Act have not been pursued due to the lack of knowledge of police officers with regard to the relevant enforcement procedures. Creativity and IP rights are also not seen by the banking and private equity investment community as valuable assets. There is no evidence of a structured collaboration between the tourism sector and the cultural and creative sector, and this is particularly so on mainland St. Vincent.

The findings and recommendations of this policy framework and development strategy provide a guide only and successful implementation will require dialogue and partnership between all parties, government, industry practitioners (including media), and the banking and investment sector. Emphasis must be placed on awareness building through a planned public education campaign. The activities of Invest SVG and relevant projects within the CED such as the Vincy Time website, the Business Incubator project and the proposed Virtual Mall, need to be expanded in scope to specifically target products and services offerings from the cultural and creative industry. Training and capacity building at all levels is a major challenge that must be faced with urgency. Industry practitioners are presently way below the level of professionalism and organizational capacity that is necessary.

In moving forward, a series of meetings will be necessary between the main parties to discuss ways of implementing the recommendations made. To facilitate this it is critical that industry participants move expeditiously to establish organizations to represent their interests.

Methodology

This study was undertaken using a combination of direct interviews, focus group meetings and questionnaires with cultural industry participants, representatives of Government departments and agencies and policy makers over a three month period.

Substantial use was also made of prior local and international research in particular, the research of Vonnie Roudette on the local arts and crafts sub-sector, and the work of Mrs. Joylyn Lampkin whose research for the National Export Strategy provided very valuable information. The cooperation and information provided by Minister of Culture Rene Baptiste and Mr. Anthony Theobalds of the Department of Culture was very useful and provided the necessary guidance for the effective execution of this report. There were however, some challenges, as in some cases the level of disclosure and/or response was limited. This resulted in the limitation of the depth and level of analysis in certain areas.

The methodology employed in the preparation of this report included the following:

1. Definition and mapping of the cultural industries of St. Vincent and the Grenadines;
2. Review and analysis of relevant national, regional and international documentation and research materials;
3. Meetings with local industry stakeholders;
4. Review and analysis of existing IP regime and institutional framework;
5. Review of existing training and capacity building initiatives;

6. Review and analysis of national, regional and international mechanisms for funding, marketing, promotion and distribution;
7. Review and assessment of linkages with the Tourism and ICT sectors;
8. Consideration of policy framework at regional and global levels;
9. Preparation of a SWOT analysis;
10. Recommendations and development strategy outline.

PART 1 – INTRODUCTION & POLICY FRAMEWORK

1.0 Introduction

1.1 Culture and Sustainable Development in St. Vincent and the Grenadines

The draft Cultural Policy of the Government of St. Vincent and the Grenadines (2005) represents a clear demonstration of the significance of culture and cultural activities to national development. It speaks to the broad socio-economic development implications and impact of culture, and emphasizes the Government’s identification of culture and the arts as vital to individual and national development.

While acknowledging the broader socio-economic implications of culture and cultural activities, this policy framework document will however be confined to, and focus on, cultural industries development in St Vincent and the Grenadines, in keeping with the project objective – “To

create a sustainable enabling business environment, which provides opportunity for the private sector to increase investment and create capacity or economic competitiveness”. The Policy Framework and accompanying Development Strategy are designed therefore to create the basis on which to build an environment for the commercialization of cultural products and services so that persons involved in the cultural industries can be adequately rewarded for their efforts.

1.2 Policy Framework

Music Sector

Summary of present situation

- Discrimination in fees paid to foreign versus local artistes;
- Limited opportunities for live performances in the hotel circuit, and the lack of adequate facilities for presentation.
- Low levels of airplay outside of Carnival period – there are 10 radio stations (FM) which play primarily Jamaican reggae and Anglo-American pop. There are no local content requirements.
- Limited sources of financing and lack of awareness of possible sources of funding results in limited overseas promotion and production. Similarly, there is lack of private sector buy-in for Carnival resulting in low sponsorship;
- There is declining attendance at calypso tents during the Carnival;
- Lack of access to professional domestic product development and representation services;
- Piracy has decimated the local market with now only 2 record shops, and sales declining by an estimated 75%; the maximum number of legitimate sales is estimated to be

approximately 500 albums. There are no legitimate online distributors and there are very few anti-piracy actions

Policy Goal:

To create an environment which allows for the maximization of revenue generation by music business practitioners

Policies

- To establish appropriate legislative and regulatory framework
- To develop training and skills development for creators, support and ancillary workers
- To support and promote properly governed trade and collective organisations
- To support development of regional and local content quota requirements

Strategies

1. Develop a complete database of local music industry participants which provides information such as the number of full-time and part-time participants, number of ancillary and support workers, main markets and revenues generated in order to guide policy

development and direction and also to determine the true economic impact of the sub-sector.

2. Undertake comprehensive research on the potential impact of the application of local content requirements to ensure local creators adequate levels of airtime and to promote local music;
3. Provision of fiscal incentives to encourage private sector sponsorship and investment in the Carnival, live performances and generally the music industry;
4. Provide ongoing anti-piracy campaigns and training programmes for enforcement agencies;
5. Undertake comprehensive review of relevant legislation and ratification of international treaties including the Rome Convention and the WPPT to ensure that infringement and anti-piracy actions are effective and to allow for the grant of rights and protection to local and international creators, including making provision for the presumption of ownership and subsistence of copyright and the reversal of the burden of proof to facilitate prosecution;
6. Conduct a feasibility study on the implementation of a home levy scheme on all imported media which may be used to reproduce copyright protected works; for example, CD-Rs and flash drives. The revenue generated should be distributed to rights-owners and to support cultural industries development programmes;
7. Offer developmental programmes including business and music programmes, and facilitate access through the provision of scholarships, grants and student loans for creators and support personnel to allow for professionalization and the growth of talent.

Arts and Crafts Sub-sector

Summary of present situation

- Craftsmen do not use trademarks or any labelling to distinguish their products. There is also very little documentation of traditional craft techniques;

- There are no standards or certification processes used to ensure a high quality is achieved consistently;
- There is little investment in marketing, with reliance on trade shows for exposure. To compound the situation there are no galleries and few display opportunities in St. Vincent and the Grenadines;
- Vincentian craftsmen are unable to operate competitively due to lack of innovation and creativity and competition from cheap imports;
- Financing is limited with some provided through the Centre for Enterprise Development and the National Development Foundation;
- Government provides material for training but there is no relief offered on import duties;
- The sub-sector suffers from the lack of formality with few export records, as product is placed on boats used for inter-island shipping and is not accounted for by Customs.
- There are few opportunities for skills development which would in turn allow for expansion into new areas or for higher levels of creativity and innovation in the sub-sector.

Some opportunities exist for the sub-sector in addition to the development of the production centres:

- The souvenir market has great potential as tourist demand small items which are easy to pack and transport, but further growth will require access to the necessary equipment;
- Pottery is also seen as having potential given the abundance of clay and black sand locally;
- Strengthening the linkages with tourism – there is a plan to develop a retail shop targeting tourists;
- Establishment of Sector Skills Development Agency (formerly National Training Agency) which will set standards for apprenticeship programmes, trainers and general human resource standards.

Policies

- To promote and strengthen a properly functioning trade association;
- To provide a framework to facilitate high standards and quality;
- To establish and support a system which allows craftsmen and artists affordable access to input materials;
- To provide exhibition and retail facilities and access to consumers including tourists;
- To provide the appropriate legislative and regulatory framework to allow for the exploitation of intellectual property rights;
- To provide education and public awareness programmes to increase the level of creativity and innovation, business skills and intellectual property rights management.

Strategies

1. Carry out economic impact assessment study of the sub-sector and development of database to ascertain the number of industry participants;
2. Review performance of production centres and development of best practices;

3. Market
in



research to understand needs of consumers
areas such as fine arts, artesian craft
or souvenirs, and to identify
potential markets;

4. Assist in strengthening of trade associations and development of strategic plan

to encourage greater self-reliance, sustainability and professionalization in the sub-sector;

5. Develop display/exhibition facilities in primary tourist locations;
6. Educate craftsmen on and assist with the use of labelling and professional packaging;
7. Educate craftsmen on the management of intellectual property rights;
8. Document and promote the use of traditional techniques found to have added value amongst consumers;
9. Expand relief on import duties for inputs into the local craft sector;
10. Develop bulk purchasing programme for in-puts;
11. Training, vocational studies and development programmes, including apprenticeships to encourage skills development in the sub-sector;
12. Develop website for the marketing of Vincentian craft internationally;
13. Provide equipment and machinery to allow craftsmen the ability to use more sophisticated production techniques;
14. Development of focused marketing campaigns in major markets for crafts, and attendance at international trade fairs to meet with potential buyers;
15. Provide micro financing schemes which are accessible to craftsmen;
16. Expand and support programmes of CED targeting craftsmen and provision of specialized training and apprenticeship programmes;
17. Prompt accession to the Hague Agreement for the International Registration of Industrial Designs to allow for efficient international registrations;
18. Promote the use of collective certification marks and standards by craft sub-sector to authenticate products and to promote professionalism.

Fashion Sub-sector

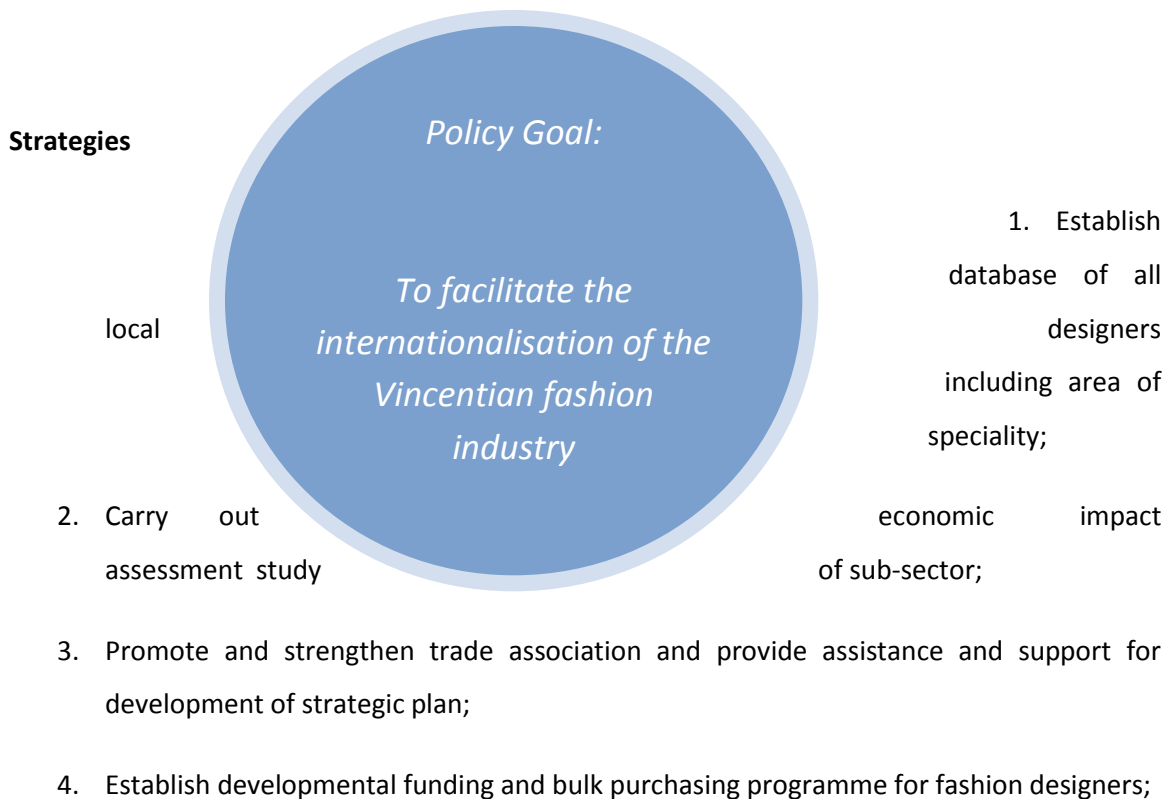
Summary of Present Situation

1. There are few trained designers, and there is need for skilled personnel such as qualified pattern makers and graders; most designers are self taught and creative, but require assistance in professional presentation;
2. There is also a need for trained ancillary and support personnel such as fashion photographers and stylists;
3. There is a lack of manufacturing capacity and difficulties finding suitable staff;
4. Business arrangements are generally informal, although with internationalization there is a growing awareness of the need for formality;
5. There is a lack of awareness of intellectual property rights – designers do not register their trademarks, and do not understand or are unaware of the use of industrial designs;
6. Demand is greater than supply – a result of difficulties in accessing inputs, but also because of the part-time nature of participants;
7. Arts and craft are generally not a requirement in the school curriculum. There is an A'level fine arts programme which is encouraging a greater interest in the fashion industry but there are no programmes to provide technical and business training;
8. There is no active industry association to lobby for the sub-sector;
9. The sub-sector does not benefit from any relief on import duties, and no bulk-buying programme; the cost and access to fabrics and other imported raw materials present a real challenge;
10. Local training programmes suffer from the lack of reference materials and books.

11. There is a lack of financing – except for that which is available through the National Development Foundation, but clients report difficulties in meeting the repayment terms.

Policies

1. To establish the appropriate legislative and regulatory framework to allow for the greater exploitation of intellectual property rights;
2. To provide access to training and skills development programmes locally and internationally in all relevant areas including intellectual property management, creative and business skills;
3. To support the establishment of a trade association;
4. To ensure the availability of fiscal and other incentives to participants in this sub-sector



5. Provide access to training programmes locally, regionally and internationally for designers through scholarships and funding in fashion design, business management and skills development;
6. Strengthen local training opportunities including the provision of training and reference materials;
7. Educate designers on intellectual property management, including the licensing of designs as a form of business expansion where manufacturing capacity does not exist;
8. Accession to Madrid Protocol and funding to assist with the registration of intellectual property;
9. Continue support for showcasing of Vincentian fashion internationally through participation in more trade shows and in local showcasing events.

Festivals and Events Sub-sector

Summary of Present Situation

1. Inadequate levels of corporate sponsorship for events including Carnival;
2. Low levels of international marketing for events other than Carnival;
3. Lack of adequate linkages with Ministry of Tourism and hence, low level of attraction for tourists;
4. Lack of appropriate physical infrastructure for the staging of events lacking adequate stages, lighting, changing facilities and technical support staff.

Policies:

- To develop the appropriate modern physical infrastructure for the hosting of events;

- To



coordinate marketing activity with Ministry of Culture, Ministry of Tourism and other relevant stakeholders including the creative community;

- To ensure that all national festivals and major events include participation from all cultural sub-sectors;

- To provide fiscal and other incentives to ensure increased private sector sponsorship and investment;

Strategies:

1. Conduct economic impact analysis of Carnival and other major festivals and events and contribution to the economy;
2. Revise incentive programme including fiscal incentives to attract corporate sponsorship and investment;
3. Expand relief on duties presently offered to masquerade bands to include other Carnival participants;
4. Implement marketing programmes regionally and internationally at trade shows and showcase activities in traditional and non-traditional markets;
5. Develop venue suitable for the hosting of major events, exhibitions and other cultural activities;
6. Have quarterly strategy meetings of all relevant stakeholders.

Heritage Sub sector

Summary of present situation

1. Lack of recognition of potential economic value of intangible heritage through attraction of tourists;
2. Lack of access to intangible heritage by tourists;
3. Lack of appreciation of importance of heritage in terms of identity including the need for greater documentation of and education on national heritage;
4. Need to ensure that all ethnic groups are included in national dialogue.
5. There is present concern about the rapid rate of destruction of buildings of historical value;
6. Apparent willingness to develop in areas of historical importance – an example is the building of airport in Yalou valley. There has also been some concerns raised regarding the sale of Balliceneux island which is of historical importance to the Gallinagu, despite calls for having it recognized as protected territory;



Policy Goal:

To preserve the distinct nature of Vincentian culture and important cultural objects whilst

Policies:

- Support the activities of the National Trust and local ethnic groups;
- To revise legislative and regulatory framework to ensure that necessary legal

- provisions are established to promote the preservation of cultural activities and objects;
- To educate and expose Vincentians and tourists on local history, cultural activities and objects;
 - To maintain and promote local heritage objects and activities;
 - To include relevant stakeholders in planning discussions to ensure all development plans respect cultural heritage objects;
 - To ensure documentation of cultural practices and objects.

Strategies

1. Promote stronger linkages with Ministry of Tourism, National Trust and other relevant stakeholders in development planning and marketing activities;
2. Include exposure to intangible and tangible heritage in tourism marketing and programmes and linkages with eco-tourism projects;
3. Encourage use of local traditional foods in restaurants in primary tourist areas;
4. Document local intangible and tangible heritage objects and activities and distribute documentation especially to students;
5. Establish national symbols, including possible use of petroglyph or breadfruit leaf as national symbols and as authentication label for Vincentian products to be used in tourism marketing campaigns.
6. Review of fiscal incentives to encourage greater private sector investment in the preservation and protection of tangible heritage;

Book Publishing and Literary Arts Sub-sector

Summary of present situation



1. Inadequate printing facilities
2. Non-existence of local commercial book publishers
3. Limited commercial activity

Policies

- To provide the space necessary for the showcasing of local literary works;
- To promote the creation of local literary works;
- To create an environment conducive to local publishing activities;
- To educate Vincentians and the international audience on Vincentian literary works;
- To document traditional folklore.

Strategies

1. Establish database of all local authors including poets;
2. Carry out economic impact assessment study of sub-sector;
3. Promote establishment of literary arts and book publishing trade association and provide assistance and support for development of strategic plan;
4. Support submission of works to and attendance at regional and international literary festivals
5. Incorporate literary arts showcases in other cultural events;
6. Develop comprehensive documentation and repository programme for local literary works;
7. Support activities of Eastern Caribbean Reprographic Rights Association (ECRRA)
8. Establish developmental funding to facilitate establishment of commercial printing facilities and bulk purchasing;

Performing Arts (dance, theatre) Sub-Sector

Summary of present situation

Apart from the annual Theatre Arts Festival, there are approximately five other small theatrical presentations each year. However, only one performing arts group has ever staged a show independently. Most shows represent an amalgam of performances from different groups. The primary venue for the presentation of the performing arts is the Peace Memorial Hall, with a capacity of 200. There is mention of a plan for the construction of a larger more modern performing arts centre, but no work has commenced as yet.

Dance is by far the most vibrant activity in the SVG performing arts sub-sector. There are approximately 6 functioning dance groups/companies, and 21 schools with groups of dancers. There is however little evidence of any attempts to incorporate dance with music production and presentation activities such as promotional music videos and live musical performances.

Policies

1. To support professionalization and programmes to allow for financial sustainability of theatrical groups;
2. To develop and support programmes which allow for the increased showcasing and of performing arts presentations;
3. To encourage the development of performing arts groups and activities in schools;

Strategies



1. Establish database of all local dramatic, dance and other performance groups and individuals;
2. Carry out economic impact assessment study of sub-sector;
3. Promote and strengthen trade association and provide assistance and support for development of strategic plan;
4. Review and develop comprehensive performing

arts programmes at primary, secondary and tertiary levels;

5. Offer of performing art scholarships;
6. Provide incentives for the incorporation of performing artists in other cultural forms;
7. Provide adequate physical infrastructure and resources for showcasing of performing arts;
8. Include performing arts showcases at tourism promotion events locally and abroad;
9. Ensure access to development funding for performing arts organisations.

Film and Video Sub-sector

Summary of Present Situation

- Development of the domestic film and video sector does not appear to be a priority area as there is no evidence of funding or other support to producers, and a department for promotion of this sector does not exist.
- Lack of respect for the value of local video production services
- High cost of imported equipment
- Untrained technical personnel
- Under-developed local market for products

Policies

- To provide support for further development of local film and video sector;

- To provide programmes which allow for skills development;
- To provide opportunities for the showcasing of local creations.



Strategies

1. Establish database of all local video and film producers, actors and support service providers;
2. Carry out economic impact assessment study of sub-sector;
3. Establishment of a specialized division of an existing government agency to act as a film commission;
4. Design and implement a campaign to attract overseas film makers to SVG as a production location for shooting of feature films, music videos and TV commercials;
5. Establish developmental funding for local producers and opportunities for international collaboration;
6. Provide incentives for local broadcasters to include increased local programming;
7. Provide funding assistance and scholarships for local producers and actors;

8. To incorporate participants from other cultural sub-sectors and ancillary workers in local productions e.g. fashion designers, performing artists, musical composers, beauticians, sound technicians etc.

Public Institutional Framework – Ministry of Culture

Summary of present situation

Presently, the Ministry of Culture operates with an internal department as well as statutory organisations which oversee policy and developmental activities in addition to the production of the national carnival. The Peace Memorial Hall is the only entity which is self sustaining whilst the others are dependent on budgetary allocations from Government. However, it is recognised that there are a number of operational inefficiencies. The National Cultural Foundation/NCF remains for the most part inactive. Its mandate appears unclear and in fact conflicts with especially the CDC - To organize cultural festivals, and the NCF – To develop, maintain and manage theatres, libraries and other cultural facilities and equipment provided by the government;

The role of the Government in the development of culture may be summarized as:

- to establish policies and programmes for the sustainable development of the cultural industries;
- to provide legislation to promote local and foreign investment;

The situation in St. Vincent and the Grenadines warrants a review process as highlighted in the Submission of Advance Proposals by the Department of Culture for 2009,¹ *“After fifteen (15)*

¹ (SVG Department of Culture 2008)

years while the number of persons working in the Department has increased somewhat, the structure of the Department has remained the same. It is time to show, in the structure of the Department and in staff to operationalize the NCF, the serious concern for cultural development”.



Policies:

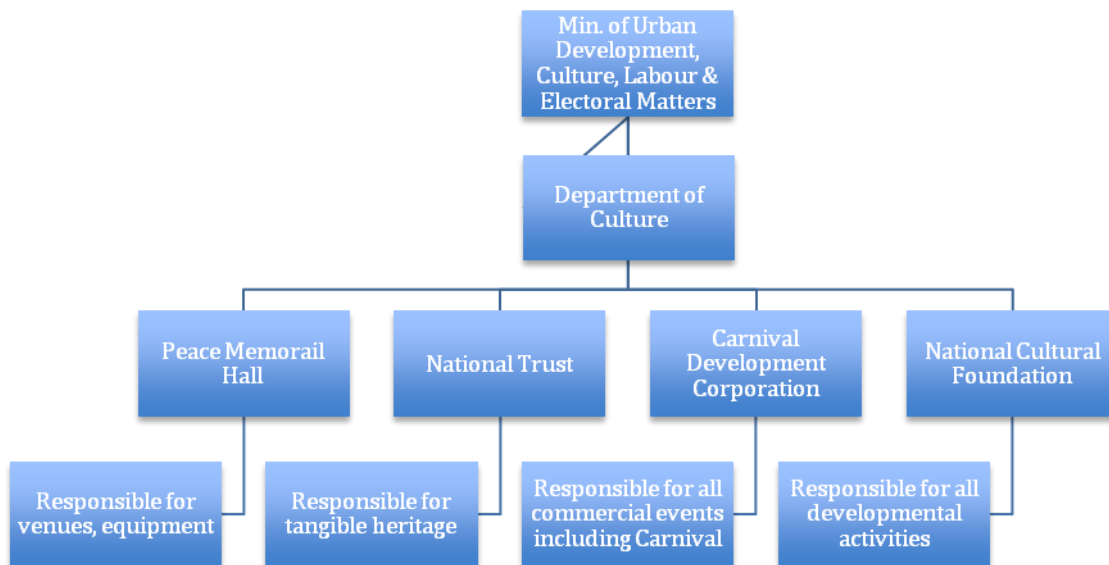
- To create a coordinated policy making and strategic planning environment;
- To develop a relevant institutional framework and to deploy the necessary resources;
- To streamline operations in the most efficient manner;
- To proactively engage stakeholders.

Strategies

- The Department of Culture should retain responsibility for policy, research and oversight of the various agencies but it must be ensured that there is staff with the knowledge base to address issues such as international agreements, including the analysis of trade agreements.
- Strategic collaboration with the Ministries responsible for education, trade, finance, legal affairs and all other relevant areas, recognizing the multi-sectoral nature of the cultural industries;

- Peace Memorial Hall should remain a stand-alone agency but the expertise garnered over the years should be galvanized to have it take responsibility for the general management of theatres, other cultural facilities and equipment, instead of placing that responsibility with the NCF;
- The NCF should assume a developmental focus whilst the CDC is restructured to allow it to focus on the commercialization of national festivals and events given its experience with the management of the Carnival.
- To ensure financial viability of CDC, fiscal policies should be implemented to encourage increased private sector investment, a comprehensive financial review of Carnival and other major national events should be done, commitment of Government to provide adequate subvention should be reinforced, and research conducted to explore the possibility of CDC providing competitive event planning services to private events as a source of funding.

Figure 1 Revised Institutional Framework – Ministry of Culture



Public Institutional Framework – Commerce and Intellectual Property

Office (CIPO)

Summary of present situation

- CIPO has experienced technological difficulties which have hindered functionality. For example its server had not been functioning for some time at the time of this study and some documentation has been lost. The office is unable to provide electronic services or statistics in a meaningful manner as this requires extensive manual retrieval. Nonetheless, there are plans to offer services online with electronic payment facilities in the future.
- The registration of businesses by local cultural industry practitioners is minimal. This appears to be as a result of the relatively high cost of registration.
- Although the registration of local trademarks is increasing, these increases are not reflected in registrations for the cultural industries.

- There are no registrations for collective or certification marks. Although the Industrial Designs Act 2005 came into force in 2005, as yet there have been no applications. In all cases the lack of registration of intellectual property rights appears to be because of a low level of awareness.

Policies:

- To effectively educate cultural practitioners on intellectual property rights and the management of their rights;
- To provide training for enforcement agencies to allow for the enforcement of rights;
- To ensure access to the intellectual property and judicial system by rights-owners;
- To provide services at affordable rates.



- To educate the public with regard to the value and importance of intellectual property

Strategies

- Provide annual enforcement, anti-piracy and anti-counterfeiting

workshops with the collaboration of the

World Intellectual Property Office (WIPO), the International Federation of the Phonographic Industry (IFPI) and other local and international stakeholders and enforcement bodies for cultural industry practitioners, the general public, attorneys and enforcement agencies;

- Review the registration costs for local businesses to ensure that the costs are affordable;
- Provide technical expertise to individuals, trade associations and organisations within the cultural industries;
- Develop an extensive education and public awareness programme aimed at students, creators and the general public on innovation and creativity and intellectual property rights;
- Develop sustained anti-piracy campaign;
- Develop strategic partnerships with cultural industry trade associations and other private and public sector stakeholders.

Figure 2 Revised Institutional Framework – CIPO



Public Institutional Framework – Centre for Enterprise Development & Invest SVG

Summary of Present Situation

Centre for Enterprise Development (CED)

The main challenges of CED are:

- Reconciling its mandate to raise funds with its developmental focus;
- Meeting annual financial requirements
- Meeting internal human resource requirements and capacity building

It does not presently have many clients in the cultural industries but is advocating the development of clusters including one for the cultural industries as was done in agriculture.

Invest SVG

There are some challenges to the proposed increased interface by Invest SVG with the creative and cultural industry. These include:

- Invest SVG's own knowledge of, and familiarity with, the intricacies of the sector, are limited and inadequate; and
- The lack of coordination of an agreed agenda of activities for national development.

Policies:

- To provide technical and financial assistance to cultural industry participants;
- To provide and support training programmes in priority areas of the various sub-sectors;
- To expand the business incubator programme with a specific focus on the cultural industries;
- To develop internal capacity to allow the offer of the highest levels of service;
- To develop strategic alliances with trade associations, public and private sector entities involved in the Vincentian cultural industries;



Policy Goal:

To provide relevant services to cultural industries practitioners to enable the development of globally competitive local businesses

Strategies:

- Review existing literature on the local cultural industries to ascertain priority areas, as well as regional and international literature to establish best practices, bench marks and to develop follow up action plans;
- Engage in structured dialogue with cultural industry stakeholders in order to develop coordinated national strategy and to limit areas of overlap;
- Develop training programmes for staff on various aspects of the management and development of the cultural industries;
- Prepare and disseminate market research and other relevant information including annual reviews to stakeholders.

Private Institutional Framework

Summary of Present Situation

Relevant private sector creative industry organizations are either non-existent, dormant or institutionally very weak in St. Vincent and the Grenadines. Existing entities are lacking structure, administrative support, funding and access to business and management skills.

Policies:

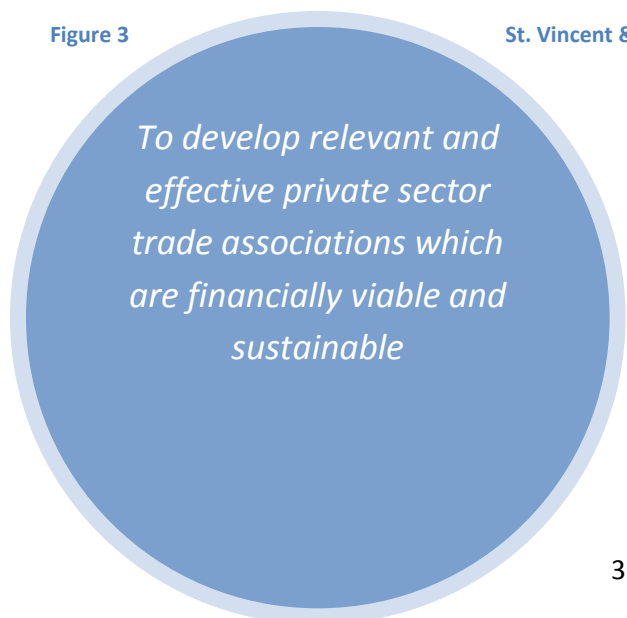
- To provide integrated support services to cultural industry participants;
- To provide a framework that represents the interests of cultural industry participants, and allows for meaningful inter-sectoral dialogue.

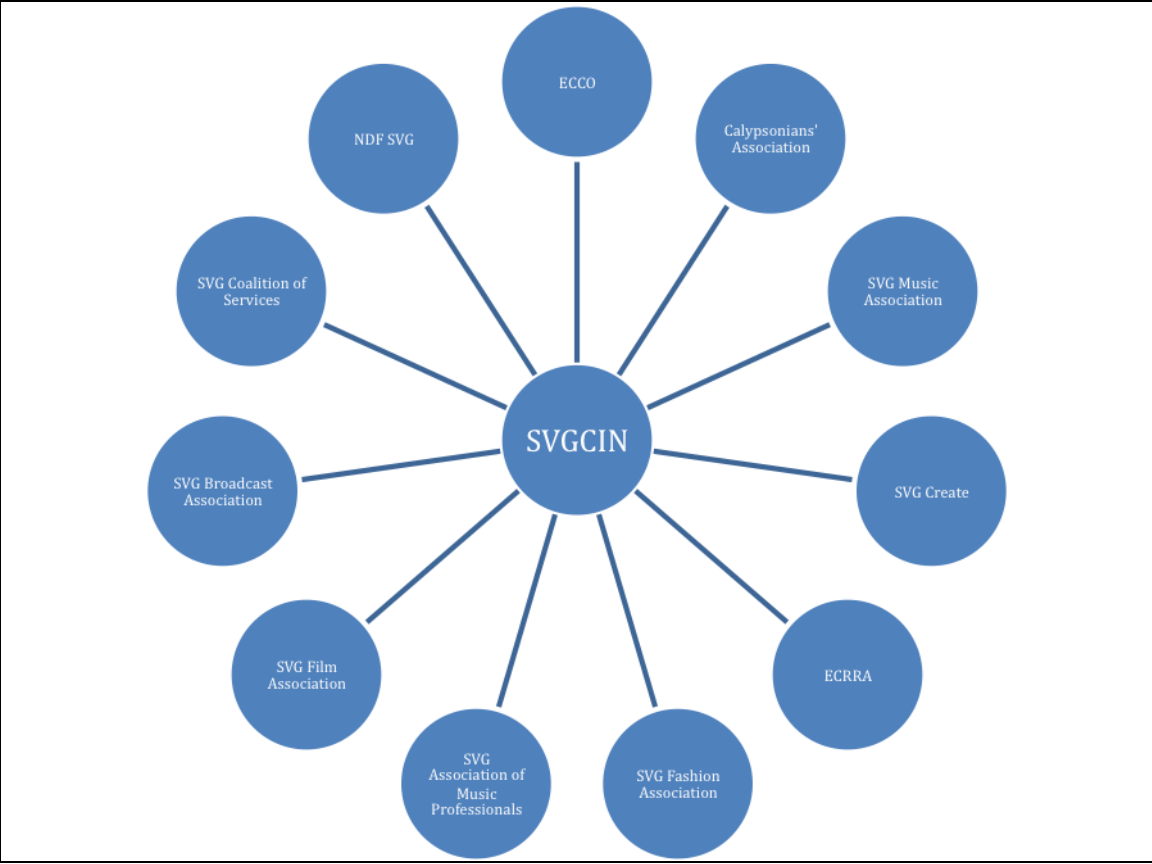
Strategies:

- An umbrella organization should be established to represent the interests of all sectors of the cultural and creative industry;
- Other sub-sector organizations should be established to represent the specific interests of practitioners in those sub-sectors;
- Empower trade associations to be financially sustainable;
- Facilitate the offer of administrative and marketing support by the SVG Coalition of Services.
- Create a network of all public sector and private sector stakeholder organizations and agencies. (SVG Cultural Industries Network)

Figure 3

St. Vincent & the Grenadines Cultural Industries Network (SVGCIN)





PART 2 – SITUATIONAL ANALYSIS

2.0 Definition and Mapping of Cultural Industries

2.1 *Cultural and Creative Industries*

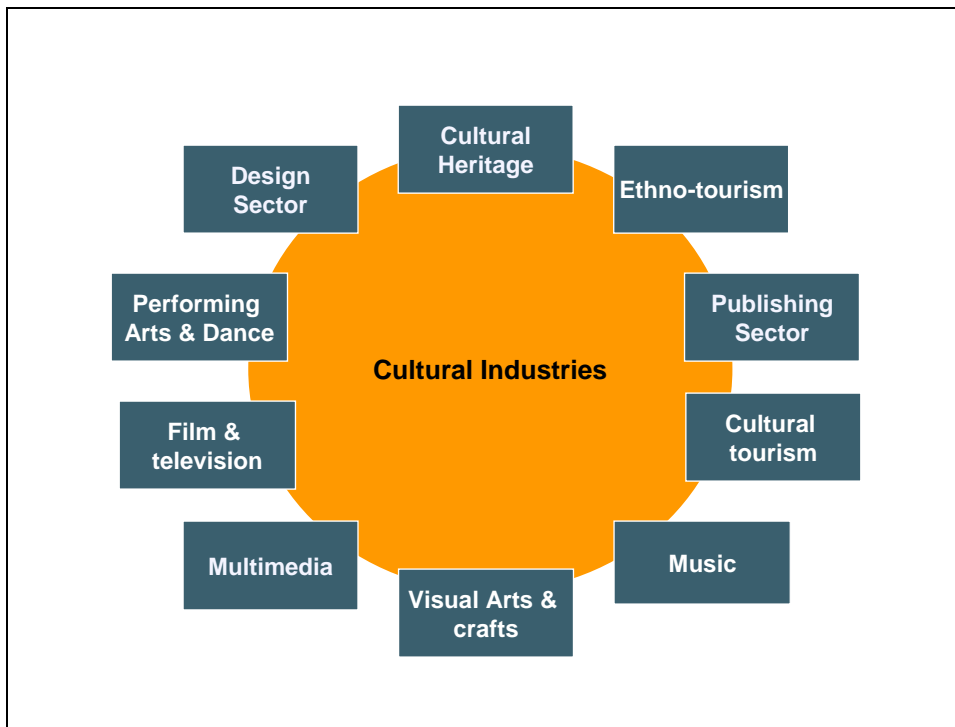
According to the UNESCO website the terms “cultural industries” and “creative industries” have been used interchangeably in reference to **“those industries that combine the creation, production and commercialisation of contents which are intangible and cultural in nature. These contents are typically protected by copyright and they can take the form of goods or services”**. In some countries cultural and creative industries are also referred to as “sunrise” or “future-oriented industries” or even “content industries”. In all instances however, the notion includes printing, publishing and multimedia, audiovisual, phonographic and cinematographic productions as well as crafts, design and the visual and performing arts. In some countries the concept is also extended to include architecture, fashion, sports, manufacturing of musical instruments, advertising and cultural tourism.

Although used interchangeably, there is an accepted distinction between the terms and the most commonly accepted definition of the creative industries is that these industries are “those requiring creativity, skill and talent, with potential for wealth and job creation through the exploitation of their intellectual property.” (UK Department of Culture 2001)² The cultural industries are a sub-set of the creative industries as the creative industries include for example, software, advertising, architecture and business intelligence services.

² UK Department of Culture, Media and Sports, 2001

UNESCO defines “cultural products” as being inclusive of both goods and services where “cultural goods” are defined as “consumer goods which convey ideas, symbols and ways of life” whilst “cultural services” are “those activities aimed at satisfying cultural interests or needs. Cultural services do not represent material goods in themselves but facilitate their production and distribution.” Such activities may include licensing activities, the promotion of cultural events and cultural information and preservation.

Figure 4 Scope of the Cultural Industries



(ILO & SEED n.d.)

Figure 5 The Value Chain of the Cultural Industries



- Highly fragmented consists of many individual, micro, and small enterprises
- Informality, lack of professionalism and business training
- Part-time activity and lack of financing
- Dependent on high levels of innovation and creativity
- Heavy reliance on intangible assets but general lack of awareness of intellectual property rights
- Interaction with numerous ancillary and support services

2.2 Mapping the Cultural Industries in St. Vincent and the Grenadines

Effective policy development is only possible if it is based on accurate and reliable data. Accurate and reliable data is also a pre-requisite for an analytical understanding of the status of cultural industries in a country and the impact on economic and social development. The ultimate objective of data in this sector, therefore, is to make an assessment of the demonstrable extent to which cultural industries can impact on poverty reduction and local economic development. Similar to indicators for other sectors of the economy, economic indicators for cultural industries may be assessed as a ratio of working population, output, capital, and productivity.³

As is the case in most developing countries, there are challenges in attempting to map the cultural and creative industries of SVG. For purposes of this policy framework document a

(UNESCO n.d.)

number of interviews were conducted and questionnaires sent to industry stakeholders in the private and public sectors.

SVG Overview of trade in culture

St. Vincent & the Grenadines is a net importer of cultural goods as reported by UNESCO⁴:

Exports US\$ thousands

Books	Visual arts	Audiovisual media	Total
2.7	17.6	0.4	20.2

Imports US\$ thousands

Heritage goods	Books	Newspapers & Periodicals	Other printed matter	Recorded media	Visual Arts	Audiovisual media	Total
28.1	1,127.7	245.4	169.7	113.8	241.5	24.4	1,950.8

2.2.1 Music Sub-Sector

Background

⁴ International Flows of Selected Cultural Goods and Services 1994-2004 – Defining and Capturing the Flows of Global Cultural Trade, UNESCO Institute for Statistics, UNESCO Sector for Culture 2005

The music sub-sector is by far the most vibrant sector of the cultural and creative industries in SVG, and is comprised of recording and performing vocalists, musicians, music producers, steel bands and other ensembles, choral groups, and personnel providing representation and technical support such as agents, recording engineers, designers, and providers of equipment services. The main musical genres are calypso, raga-soca, jab jab, reggae, hip-hop, American pop. Opportunities for live performance presentations are limited. Major national events such as the SVG Carnival and overseas participation in Trinidad Carnival, Caribana and Labour Day in North America do provide some performance outlets for musicians.

Estimated No. of Writers, publishers, performers & producers⁵:

An up to date directory with listings of the participants in the SVG music sector does not exist and the only available published statistics are as follows:

Writers Composers & Publishers	20
Performers	285
Producers	8
Average number of compositions created	110
Sound recordings manufactured per annum	190 ⁶

⁵ (Berry 2004)

⁶ (Nurse 2001)

Information provided from focus group meetings and interviews conducted by the CCI consulting team however reveal the existence of the following:

Solo Music Performers	50
Music Producers and Promoters	24
Performing Bands (including steel bands)	14
Gospel Bands	12
Drumming Groups	5

The music sub-sector in St. Vincent and the Grenadines has four associations:

- The Calypsonians' Association is established to function as a union, and calypsonians must be members in order to compete in CDC organized events. It functions in collaboration with the Carnival Development Corporation (CDC), but has no secretariat or resources.
- The SVG Music Association focuses on classical music and traditional folk. It previously organised the National Music Festival annually, but this has not been held for the past three years.
- Eastern Caribbean Collective Organisation (ECCO) is the collective management organisation for the Organisation of Eastern Caribbean States' territories headquartered in St. Lucia with a local agent and director in St. Vincent and the Grenadines. It presently has just over 60 members registered but has not yet started operations in SVG although training has been provided for the agent.
- The Youlou Pan Movement is established to provide representation for all panists, pan builders, pan arrangers and pan tuners in St. Vincent and the Grenadines.

The main sources of domestic revenue for musicians are through the provision of live performance services on cruise ships and during Carnival. There is also revenue generated from tour markets primarily in Trinidad and Tobago and in New York for the Diaspora community.

Legal and Regulatory Considerations

Copyright and related rights issues are addressed in the Copyright Act 2003. St. Vincent and the Grenadines has also ratified the WIPO Convention, Berne Convention and TRIPS agreement in 1995. St. Vincent and the Grenadines as part of the OECS territory is covered by the Eastern Caribbean Copyright Organization (ECCO) and collective management activities are to start shortly. The estimated minimum licensing revenue for both copyright and related rights is US\$68,000. Under Part X of the Copyright Act – Collective Societies, permission is required by registration from the Registrar of Intellectual Property to establish a Collective Management Organization (CMO). It is also provided that the Registrar shall not under normal circumstances register more than one CMO in respect of the same class of works.

However, there are some challenges to effective collective management in SVG in relation to performers and the producers of sound recordings. There is uncertainty with regard to the interpretation and application of the Copyright Act provisions relevant to these neighbouring rights, particularly with reference to foreign rights holders. Additionally, SVG is not party to the Rome Convention for the Protection of Performers, Producers of Phonograms and Broadcast Organisations or WIPO Performances and Phonograms Treaty (WPPT). Clarification is necessary as foreign rights-owners may not be incentivised to make investment in SVG and local rights-owners are disadvantaged internationally. The recent international successes of artists such as Kevin Lyttle and Mattafix provide clear confirmation that SVG recording and performing artists can be globally marketed, but they are unable to collect performance royalties internationally as a result of the abovementioned circumstances.

Additionally, under the Copyright Act difficulties arise in the prosecution of pirates as the claimant must prove not only authorship but also the subsistence of copyright and respective ownership. In practice this means that first it must be proved that copyright infringement has taken place as well as all aspects of copyright - subsistence of copyright, authorship of the work, chain of title, assignments, and when necessary the owners of copyright will have to come in from overseas to testify.

This makes an infringement action potentially lengthy and expensive and has resulted in the lack of successful prosecution. The above is also complicated by the burden on the claimant to prove that the defendant does not have a legitimate licence which given the possibility of multiple rights-owners and licensees can be extremely difficult.

2.2.2 Arts and Craft Sub-sector

Background

The international trade in visual arts and crafts was valued at US\$23.2 billion in 2005⁷ and according to the Creative Economy 2008 report the arts and crafts industry is the only creative industry where developing countries have a leading position worldwide, accounting for 60% of total world exports of creative goods. The market for craft products relies on quality and design, and the application of historical, artistic, and unique inputs, and is characterised by:

- Requirement of little start up capital
- Flexible working hours
- Self employment
- Small production runs

⁷ UNCTAD, UNDP Special Unit for South-South Cooperation 2008, Creative Economy Report

The visual arts and crafts sub-sector is the largest cultural sub-sector in St. Vincent and the Grenadines and represents the area of greatest growth potential. Other than CARICOM, the markets of greatest interest are the EU (primarily Germany, UK, France, Italy and Spain), USA and Japan, which are the largest importers of visual arts and crafts. The main products of interest in these markets are traditional fine art craft, high end and commercial/mass consumption.

It is estimated that there are 50 persons working in the Vincentian craft sub-sector which is characterised primarily by individual artisans who are for the most part self-taught. Most artisans work in handicraft with some fine craftsmen and painters. SVG Create is a trade association established to represent artisans, but this organization is now dormant. SVG Create was established in 1996 to serve the interests of persons involved in craft and the fine arts (painting), and to promote public awareness and provide marketing support to participants. For a period of 6 years SVG CREATE organized and presented the National Art and Craft Exhibition during the SVG Carnival, and also operated a shop for the use of 70 art and craft producers. The organization also facilitated and supported the participation of producers in the Caribbean Gift and Craft Show for a number of years.

There has been some work done on the in service training of over 90 teachers in creative education by Fine Arts and Design lecturer Vonnie Roudette. There have been annual visual arts exhibitions since 2004 which have generated sales in excess of \$50,000 and a major art and cultural representation by SVG at CARIFESTA X in Guyana in 2008. Significant linkages have also been made through the Contemporary Young Artists Movement/CYAM arts festival held in 2006, resulting in the training of several young people overseas in over 10 disciplines.

The Government of SVG also operated a craft cooperative, but this no longer in operation. There are few opportunities to exhibit work not only in mainland St. Vincent but on the smaller islands as well, although some artisans have been able to participate in the Caribbean Gift and

Craft Show, and craftsmen, fashion designers, and jewellers have been a part of delegations to regional and international fashion shows.

Figure 6 Craft Types, Markets & Outlets⁸

⁸ (UNIDO and UNESCO 2002)

Type	Description	Product Characteristics	Price/Volume	Market/Outlet
Traditional Fine Crafts	Ethnic products, works of art produced by an individual master/artist following the traditional design. Very often unique pieces.	Uniqueness Ethnic appearance from the national heritage Historical value	High-end market. High price - Low volume	Museums, Galleries, Private Collectors, Foundations
Artisanal Crafts	Crafts produced using traditional methods. Generally hand-made using traditional raw materials and technology. The design is historically based, but adjusted to greater volume production. Workshops/artisans willing/able to collaborate with design consultant to obtain market advantage.	Ethnic appearance Historical relevance Design adapted to reflect national heritage	Medium to high-end market Medium- high price Larger volume is possible and planned for	Specialised Stores Craft Exhibition Design Centres
Commercial Crafts	Items made in the traditional manner but adapted to needs and tastes of the buyer market. Foreign professional buyers, designers redesign to adapt products to market needs, highly influenced by trends in fashion.	Ethnic appearance Design adapted to reflect national heritage.	Low to Medium Price dictated by market demand Planned for large volumes	Specialised Stores Life-style shops, Importers Tourist shops Craft Exhibition Design Centres Mainstream buyers
Manufactured Crafts – Mass Production Crafts	Products manufactured in larger volumes, using machinery and/or larger organised networks of crafters. Crafts are ordered by tradesmen in large quantity, often do not follow tradition. Patterns and designs borrowed from different sources.	Ethnic appearance Adapted design to reflect buyer market needs Accessories to extend other trendy products	Low to Medium Price dictated by market demand High emphasis on value for money, as required by buyer market Well developed value chain accommodating large volumes	Mainstream buyers, Global chains, Tourist Shops

The principal markets for Vincentian crafts are local, tourists and Trinidad and Tobago. It is notable that the traditional grass rugs of St. Vincent and the Grenadines are unique in terms of material, weave and designs, and there is an especially well-developed market for these products in the hotels in the Grenadines.

There is a handicraft division within the Adult and Continuing Education Unit of the Ministry of Education. This division has a mandate of training, and is in the process of establishing production centres which are supposed to be self-sustaining, except for instructor, premises and utility costs, which will be borne by Government. Participants are also provided training in business skills through the Centre for Enterprise Development which runs an incubator programme. Some training is also available externally in Jamaica and Trinidad and Tobago. The primary objective of the production centres is to meet supply constraints. Two production centres have already been established with 15-20 participants at each location, and it is hoped

that five will eventually be set up. Although precious stones, gold and silver have to be imported, substantial use is made of locally available materials – coconut shells, black coral, sea shells, seeds, sea bottle and straw.

Some opportunities exist for the sub-sector in addition to the development of the production centres:

1. The souvenir market has great potential, as tourists demand small items which are easy to pack and transport, but further growth will require access to the necessary equipment;
2. Pottery is also seen as having potential given the abundance of clay and black sand locally;
3. Strengthening the linkages with tourism – there is a plan to develop a retail shop targeting tourists;
4. Establishment of the Sector Skills Development Agency (formerly National Training Agency) which will set standards for apprenticeship programmes, trainers and general human resource standards.

Legal and Regulatory Considerations

Industrial Designs

The Industrial Designs Act 2005 recently came into force offering protection for *“a composition of lines or colours, a three dimensional form or a material, whether or not associated with lines or colours, is deemed to be an industrial design where such composition, form or material gives a special appearance to a product of industry or handicraft, can serve as a pattern for a product of*

*industry or handicraft and appeals to and is judged by the eye*⁹.” Under the Act a design can be registered if it is new and if, *it has not been disclosed to the public anywhere*, therefore, for designs already on the market no protection will be available under the Act. Another concern is that there is a cost involved for each design to be registered which could be a deterrent for local designers. Further, where designers are actively seeking to enter the international market, there is the additional cost of international registrations in each of the markets of interest.

However, under the EPA Agreement, CARIFORUM States have committed to endeavour to comply to accede to the Hague Agreement for the International Registration of Industrial Designs (1999). This Agreement provides for the filing of an international deposit for the registration of industrial designs in several countries. The administrative procedures under this agreement are handled by WIPO and makes provision for nationals, residents or companies established in a country party to the Agreement to obtain protection for their industrial designs through a single international deposit, in one office. This has the potential of simplifying the administrative process as it expedites the process of registration - the deposit can be made in a single country, in a single language (French or English), with payment of a single set of fees in a single currency.

Additionally, for groupings of designers, the St. Vincent and the Grenadines Trade Mark Act 2003 provides for collective trade mark defined as *“a sign used, or intended to be used, in relation to goods or services dealt with or provided in the course of trade by members of an association to distinguish those goods or services from goods or services so dealt with or provided by persons who are not members of the association.”*¹⁰ The Trade Mark Act also allows for certification marks which provide for *the owner of the certification trade mark, [to certify] in*

⁹ s. 4 Industrial Designs Act 2005

¹⁰ S. 136 Trade Marks Act 2003

*relation to quality, accuracy or some other characteristic, including in the case of goods, origin, material or mode of manufacture”.*¹¹

2.2.3 Fashion Sub-Sector

Background

The term fashion sub-sector actually describes the clothing, apparel and fashion accessories and jewellery design industries as well as modelling. Internationally, the clothing and apparel industry includes finished clothing products made from both natural and synthetic fibres and is distributed through three main channels: brick and mortar, catalogue and online. It is estimated that this industry will have a value of US\$1.78 billion by the end of 2010¹².

Category	Sales US\$ Billion	Market Share (%)
Brick and Mortar	169.256	92.9
Catalogue	7.177	3.9
Online/ Internet	5,873	3.2
Total	182.306	100.00

(Fashion Products n.d.)

The global apparel industry is characterised by:

- Large variety

¹¹ S. 141 Trade Marks Act 2003

¹² <http://www.fashionproducts.com/fashion-apparel-overview.html>

- Short life cycle
- Volatile and unpredictable demand
- Long and inflexible supply

The barriers which exist in the industry are:

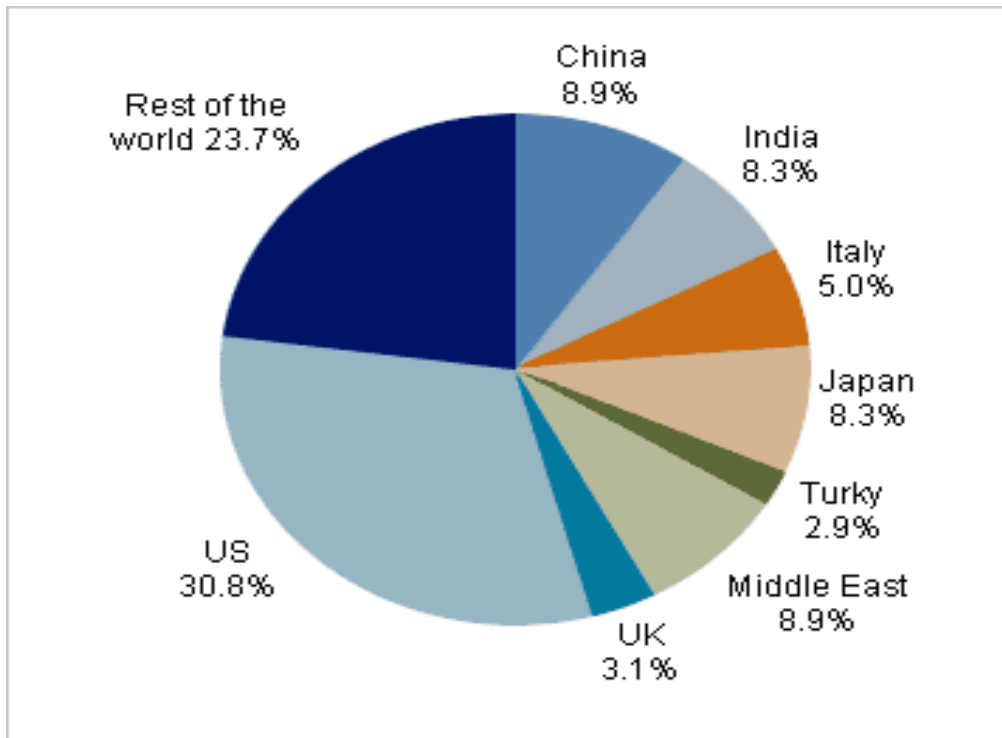
- Increasing demand and an inability to meet demand;
- Need to keep pace with rapidly changing fashion trends;
- Developing countries lack the finance, human resources and other resources to set up factories;
- Difficulties caused by competition, quality requirements and the need to produce at low costs;
- Trade regulations which impede imports;

The fashion accessories industry includes bags, belts, hats, fashion eyewear and watches. This sub-sector has an estimated value of US\$74.9 billion and this is expected to grow in spite of a number of challenges due to increasing consumer demand:

- Increasing raw material prices
- Emergence of new markets
- Changes in consumer buying power
- Over capacity and competition

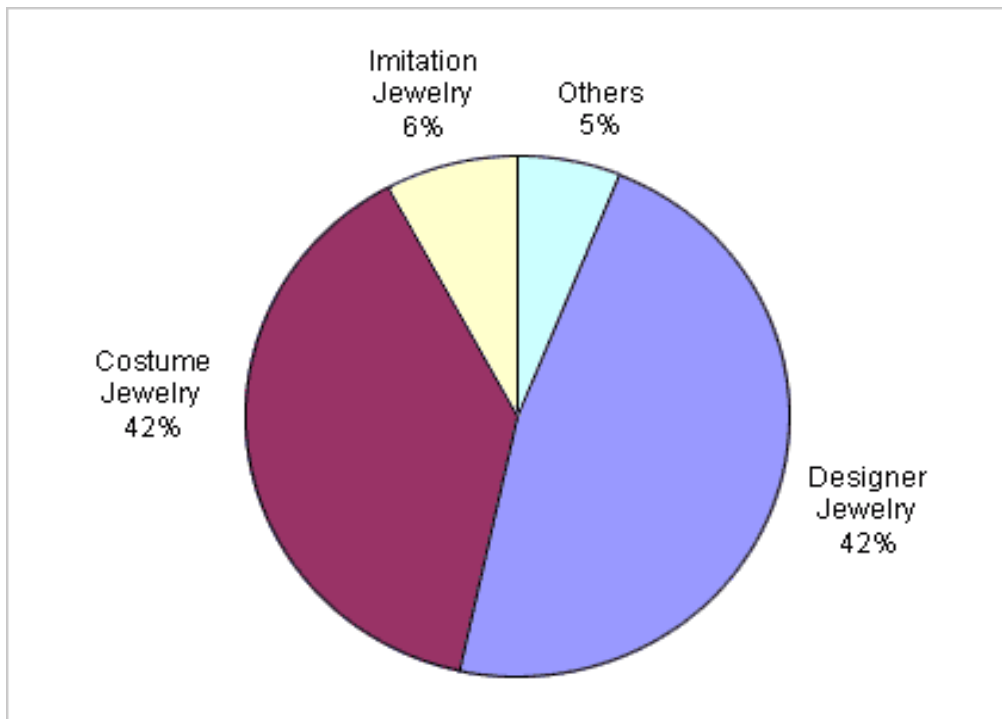
The global fashion jewellery industry is composed of replica jewellery made of leather, brass, ivory, silver plated, semi-precious stones amongst others. It is further categorised as costume, designer and imitation jewellery. The size of the global fashion jewellery industry was estimated at US\$1.46 billion as at the end of 2006 with an estimated growth rate of 4.6% reaching US\$1.85 billion by 2010 and US\$2.3 billion in 2015 with China and India having a combined value equivalent to the US market in 2015.

Figure 7 Geographic share of the global fashion jewellery consumption



(Fashion Products n.d.)

Figure 8 Market Trends in 2006



(Fashion Products n.d.)

Challenges to the further growth of the sector internationally include:

- Shortage in raw materials has led to increase in prices and competition where polishing of semiprecious stones takes place. This has in turn led to shortages in the supply chain;
- Shift in manufacture to countries with low labour costs;
- Competition from other luxury goods.

Certainly, St. Vincent and the Grenadines can boast of being the birth place of well-known designer Nicole Miller and there has been a growing interest in the fashion and accessories sub-sector in St. Vincent and the Grenadines with recent participation in New York Fashion Week, Jamaica (Caribbean Fashion Week), the Miami Fashion Week, Trinidad Fashion Week, Grenada, Barbados (including Barbados Fashion Week), St Kitts, BVI, Bahamas, and the Caribbean Gift and Craft Show. There are an estimated 5 accessory designers (jewellery, shoes and bags) and 12 clothing designers including 4 qualified designers.

Previously, there was offshore clothing manufacturing in St. Vincent and the Grenadines but most of these businesses have closed. This activity is now in decline and the few businesses that exist are micro-size. It seems that a large impetus for the present attention being given to fashion is due to the Fashion Caribbean show in SVG which ran for seven years until 2008, but has been stopped due to lack of financial support while having to compete with other regional shows. This event was able to attract top regional designers and depended on private funding and Government sponsorship. There are however, other smaller shows throughout the year. These shows are used to develop brands through exposure and to generate sales which are mainly in the local market and in traditional shops (there are presently 2 designer owned shops). Additionally, there is some vibrancy in the export of models regionally to various shows, and St. Vincent and the Grenadines has been active in the Caribbean Fashion Awards for the past two

years. There are approximately 40 models, none of which work full-time. Support for trade show attendance has been primarily offered through Invest SVG and the Centre for Enterprise Development. Organisational support is being offered by the Small Business Association and the SVG Chamber of Commerce. The primary opportunities identified for the Vincentian fashion sector are:

- Presence of a high-end market in Mustique and amongst tourists;
- Training opportunities in Barbados and Trinidad and Tobago;
- Potential, with marketing support in the online market but there is a fear that this might cause further problems in meeting supply

Legal and Regulatory Considerations

Trademarks

The Trade Mark Act 2003 is particularly applicable to fashion designers in SVG as an integral part of the branding process. Section 2(b)(i) of the Act provides that *a trade mark is taken to be applied in relation to goods or services if it is:(i) applied to any covering, document, label, reel or thing in or with which the goods are, or are intended to be, dealt with or provided in the course of trade.*” The registered trade mark system is generally not widely used by local designers and this seems to be the result of lack of awareness and cost. The issue of cost in terms of expansion into the international market is exacerbated by the fact that SVG is not party to any of the international trade mark systems. However, under the CARIFORUM/EU EPA there is the commitment to consider the possibility of acceding to the Protocol Relating to the Madrid Agreement Concerning the International Registration of Marks (1989), the revised Trademark Law Treaty (2006) (‘the Singapore Treaty’) and to endeavour to apply the Joint Recommendation concerning the protection of marks, and other industrial property rights in signs, on the Internet, as adopted by WIPO at the Thirty-Sixth Series of Meetings of the Assemblies of the Member States of WIPO, 24 September to 3 October 2001. The Joint Recommendation has as its objectives the harmonisation and simplification of the formal

requirements for the recording of trademark licenses and acts as a supplement to the Trademark Law Treaty.

The Madrid Protocol allows for the registration of trademarks internationally without having to make separate applications in each territory reducing translation costs and local trademark attorney fees. Additionally, after registration, renewals are covered through a single request and fee for all designated contracting parties. The Madrid Protocol also results in the simplification of the registration process as there is a single international application through WIPO which is responsible for checking applications. The Singapore Treaty is an update of the Trademark Law Treaty 1994 ('the TLT') and the revised Treaty addresses the formalities related to trademark registration, taking into account new developments in the field of information technology.

2.2.4 Book Publishing and Literary Arts Sub-sector

Background

The SVG literary arts, printing and book publishing sector appears to be relatively under-developed. Apart from the government printing facilities there are only three small commercial printers operating in SVG along with a few commercial desktop printing operators who offer services for cards, flyers, bound documents and some promotional items such as pens and calendars.

There is no evidence of the existence and operation of any commercial book publishers. There is one small publisher who has published its' own works and has recently embarked on providing publishing services for other authors. Almost all local books published are either self published by the authors, or published by overseas based book publishers. As a result of the inadequacy of domestic printing facilities only a few books are printed locally. Most books are printed either in other Caribbean countries or outside of the Caribbean. The Department of Culture does operate

somewhat as a book publisher, but on a non-commercial basis and primarily for purposes of documentation.

The leading literary arts, book publishing and distribution entity in the SVG is R&M Adams Book Centre operated by Vincentian writer and historian Dr. Edgar Adams. Some local book sales are also handled by Gaymes Book Shop. Dr. Adams has had 12 books published covering his works on subjects about SVG history, culture, and cultural traditions, as well as short stories and novels. According to Dr. Adams the poetry sector in SVG is fairly vibrant, and a recent survey conducted by him revealed that as many as 65 persons in SVG have had their poems published in newspapers. There are hardly any books published with SVG poems, but there is evidence of a new era of poetry in dialect in a few printed books.

The market for existing original published books is very limited as a result of the tendency to focus on content relevant only to Vincentians. Commercial printing constraints at the local level and the cost of overseas printing and transportation also act as deterrents to the growth of the book publishing sector.

2.2.5 Performing Arts (dance, theatre) Sub-Sector

Background

The SVG performing arts sector has evidence of fairly significant but part-time activity. The main activity for the performing arts is the annual Theatre Arts Festival coordinated by the Ministry of Culture in conjunction with five performing arts community groups. Each group prepares and presents its own show for the Festival. Representatives of each group also work together with representatives of the Ministry of Culture to form a Festival organizing committee.

2.2.6 Film and Video Sub-Sector

Background

The level of activity in the SVG film and video sector is very low and there is no evidence of either state funded or private institutional framework. There is no structured mechanism for the promotion of the film and video sub-sector. Approximately seven video production companies operate in the islands, local television broadcasts are provided by SVGTV and Karib Cable. Cable subscribers do however have access to other regional channels such as TEMPO and RE TV.

There have been some overseas based film and video production projects in SVG, including the feature films *Pirates of the Caribbean* and *White Squall*. A documentary on the “Nine Mornings” activities was also produced by the Travel Channel, and BET Jazz has produced a promotional video for the SVG Jazz Festival. There is however no tangible evidence of lasting benefits to SVG from the hosting of these films. Local video producers concentrate mostly on the recording of weddings and some music videos. Not many music videos are produced however. News programmes, educational programmes, the schools debating competition, some local TV commercials, a few paid programmes and the annual Carnival events represent the only local content on television in SVG.

2.2.7 Festivals and Events Sub-Sector

Background

From a national policy development perspective, festivals and major events play an integral role in the growth of the cultural industries given the fact that they generate direct and indirect income across multiple economic sectors, they act as catalysts for other activities; they generate employment and taxation revenue, and most importantly, their impact on cultural tourism. Festivals and events are a significant marketing tool in cultural tourism, offering visitors other reasons for choosing a particular location especially when they allow for unique cultural experiences. They also act as an effective economic stimulus when they take place throughout the year outside of the main tourist season and in areas which are outside of the principal tourist areas.

Internationally, there has been a rise in the number of arts and culture festivals as a result of the increase in leisure time and rising incomes, falling transportation costs, increased tourism consumption, the shift in richer countries to the services sector and the comparatively low prices of festivals. The potential of festivals and events has been exemplified in the United Kingdom during the present recession. The English collective management organization for music the PRS, estimates that UK music festivals will contribute approximately £450 million to the British economy in 2009 with two million attendees including tourists. The revenue from these festivals will be generated not only from ticket sales but also in food, accommodation and other activities.

There are a number of festivals and major events in St. Vincent and the Grenadines; the largest is the carnival, Vincy Mas which is estimated to generate EC\$20 million¹³. It is managed by the Carnival Development Corporation (CDC) and in spite of the economic value of the Carnival; the CDC operates at a financial loss.

Other major activities include:

¹³ SVG National Export Strategy 2009-2014 Export Sector: Music and Entertainment Sector Consultation Document (Draft) October 2009

- Blues and Rhythm Festival, which originated in Mustique in 1976 and is organised by the Bequia Tourism Association in conjunction with the St. Vincent Department of Tourism and the private sector entity Basil's Bar. The event takes place in January and early February in St. Vincent, Mustique and Bequia and features local and international artists.
- Bequia Regatta is a celebration of traditional boat building in Bequia and takes place in March.
- Easterval, which celebrates Easter, takes place for ten days in April and features boat races, sports, a calypso competition and beauty pageant in addition to traditional activities such as pumpkin wood boat racing. It began in 1966 and is organised by the Union Island Easterval Committee.
- Maroon and Arrowroot Festivities take place around Easter and celebrate the costumes and dancing, songs of Africa, and the Big Drum Dance, unique to the southern Grenadines. It also includes a celebration of the important root crop.
- Breadfruit Festival takes place every weekend in August throughout St. Vincent, showcasing dishes made from breadfruit along with local cultural activities.
- Independence celebrations take place during the month of October with a variety of activities including Gospel Fest, fashion showcases, pageants and arts and crafts fairs.
- Nine Mornings, which takes place during the nine days preceding Christmas, but remains relatively unknown to non-Vincentians and hence is not a major tourist attraction.

With the exception of Carnival, it is difficult to measure the true impact of these events on tourist arrivals, as there are no significant changes observed.

Current Calendar of National Events

Month	Event
January	Blues Fest
February	St. Vincent Yacht Club Regatta
March	National Heroes' Day
	Bequia Easter Regatta
April	Easterval
May	Maroon and Arrowroot Festivity
June	Canouan Regatta Weekend Festivities
	Bequia Carnival
	Vincy Mas
July	Fisher Man's Day (Bequia)
August	Breadfruit Festival
October	Independence Celebrations
November	National Tourism Month
December	Nine Mornings

Venues for Festivals and Events

Name	Capacity	Type of Events/Facilities
Peace Memorial Hall	225	Main performance space Theatrical productions but also used for concerts, meetings
Arnos Vale Playing Field	8,000-10,000	Stadium and sports complex – cricket field (seated and standing audience) and

	Cricket field 1,000 smaller facility	hard court used for outdoor concerts (standing audience)
Victoria Park	2,000 seated 12,000 standing	Primary venue for Carnival events and major music concerts
Methodist Hall Church	250 200	Conference venue with 2 floors
Heritage Square	800-1,000 standing	Outdoor street space in Kingstown which is closed to traffic. Outdoor events
Small venues throughout islands – bars, restaurants etc	Max. 300 -400	Small presentations, dances
11 resource centres	100-150	
School auditoria		

There are plans for a new performing arts auditorium with a capacity of 700 seated.

2.2.8 Heritage Sub-Sector

One of the principal foundations upon which the cultural industries is built is tangible and intangible heritage. Tangible heritage includes monuments, historical buildings and objects and archaeological sites, whilst intangible heritage includes rituals, social practices, oral traditions, traditional dance and language. The preservation of cultural heritage, while being recognized as providing economic value, is often more acknowledged for its role in providing a measurement of the identity and soul of a people.

Cultural heritage is not limited to material manifestations, such as monuments and objects that have been preserved over time. This notion also encompasses living expressions and the traditions that countless groups and communities worldwide have inherited from their ancestors and transmit to their descendants, in most cases orally (UNESCO)

Intangible Heritage

The islands of St. Vincent and the Grenadines have a rich intangible cultural heritage which has been informed by various ethnic influences. With an estimated population of 118,149 (June 2008 est.) the ethnic groupings are: African descent 82%, Mixed (European, Asian and Carib) 14%, other 4% (Commonwealth Yearbook 2009). Of particular interest are the cultural influences of the members of the community who are the descendants of African slaves, the Carib-Amerindian community and the White emigrants from Barbados.

The Amerindians (a mixture of Arawaks and Kalinago) inhabited St. Vincent before the Europeans arrived, and there are still a sizable number of artefacts to be found on the island. The African slaves mixed with the indigenous Amerindian community and a distinct grouping, the Garinagu was formed. In 2001 UNESCO proclaimed the language, dance and music of the Garinagu as a Masterpiece of the Oral and Intangible Heritage of Humanity in Nicaragua, Honduras, and Belize, however, in St. Vincent the community was largely destroyed. After the colonisation of the island, the British deported the Garinagu to Honduras following various revolts. However, there are still remnants of the Garinagu, particularly in the Greiggs and Fancy districts, and of the Kalinago in the Sandy Bay area. Garinagu chief, Joseph Chatoyer who was killed in 1795 is a National Hero. There is a North Windward Tourism Association and a Garifuna Cultural Foundation that work to preserve the Garinagu heritage.

Following emancipation, labour shortages led to the immigration of East Indian, Portuguese and White labourers from Barbados. In the mid-19th century given the harsh conditions of the former white indentured slaves in Barbados, there was a relocation programme to other islands including to the Dorsetshire Hill district and Bequia. The immigrants in Bequia specialised in boat building and this is still practised in its traditional form.

Distinct Vincentian heritage traditions include:

- Quadrille dancing in the Sandy Bay area
- Big Drum Dance – Union Island
- Rain Dance – Union Island
- Wedding Cake Dance – Union Island
- Ancestral food leaving – Union Island
- 11/2 chatie dance – North Leeward side
- Bamboo basket weaving – Greggs district
- 10 stone dance – Greggs

Traditional gastronomy:

- Crayfish and callaloo
- Tri-tri fish
- Coconut Boileen
- Bam-bam
- Funghi and jack fish
- Madungo
- Potato pudding
- Fish broth
- Peleau
- Breadfruit and jack fish

It is notable that these dishes are generally not available in local restaurants for tourists.

There is official recognition of the intangible heritage of the island which is party to the World Heritage Convention, and the Convention for the Safeguarding of the Intangible Cultural Heritage. The national dish is Breadfruit and Jackfish, and there is also a drive to establish other national symbols. There is further recognition to cultural diversity with accession in September 2009 to the Convention on the Protection and Promotion of the Diversity of Cultural Expressions, (Paris, 20th October 2005) and evidence of this recognition is also provided in (East) Indian Heritage Day on the 11th of October.

Tangible Heritage

The SVG National Trust is established under the St. Vincent and the Grenadines National Trust Act 1969 and is charged with the primary responsibility for the administration of the tangible heritage of St. Vincent and the Grenadines. Its mandate includes:

- To conserve, acquire and hold land, and buildings;
- To locate, restore and conserve buildings and objects of archaeological, architectural, artistic, scientific or traditional interest;
- To declare places, buildings and objects as Protected National Heritage;
- To make and keep inventories of buildings and properties held by the Trust;
- To make and keep photographic records of St. Vincent and the Grenadines;
- To educate the public in the historical assets and natural amenities of St. Vincent and the Grenadines.

The National Trust currently manages five properties and is seeking to acquire a further eight properties.

The National Trust is also engaged in a number of archaeological projects and in particular there is attention being paid to the petroglyphs (ancient rock carvings) of St. Vincent and the Grenadines found in the districts of Lodge Village, Indian Bay Point, Layou, Buccament, Barrouille, Petit Bordel, Colonarie and Yambou, with inventory work and monitoring being carried out.

The National Trust has submitted an application to the UNESCO Cultural Centre seeking assistance in the preparation of a list of natural and cultural sites for inclusion on the World Heritage list, including the Yambou petroglyphs. It should be noted that the Yambou valley with six known petroglyphs has been designated for airport development and research is being undertaken for the relocation of the petroglyphs.

Legal and Regulatory Considerations

In 2007 the Act 37 was passed which authorises the National Trust to declare as “Protected National Heritage” any place, building or object which should be conserved, restored or protected on account of its national interest, or the archaeological interest. If a place, building or object has been declared Protected National Heritage, it is a criminal offence if there is any tampering. The Carnegie Building and Layou Petroglyph have been declared Protected National Heritage with a shortlist of four other properties identified. In addition to Protected National Heritage status, there is also protection through the designation as a “historic building” under the Preservation of Historic Buildings and Antiquities Act.

3.0 Objectives of the SVG Policy Framework

The aspect of the SVG government policy direction on cultural industry which is being pursued under this project relates to the realization that the commercialization of products and services will provide new opportunities and create significant value-added. For many participants in the Vincentian cultural industries – especially small firms with relatively few resources – finding new markets and customers, and making the best of the avenues they have in sight can be difficult. Such difficulties are compounded by the fact that a relatively small domestic market, and niche products – mean that for many firms it is global markets that offer the best sales potential. Helping individuals, firms and sub- sectors to find new markets and better connect with existing ones is therefore a priority.

The overall objective of the Cultural Industries Policy Framework for St. Vincent and the Grenadines is to create a sustainable enabling business environment, which provides the opportunity for the private sector to increase investment and create capacity for economic competitiveness. The policy framework is designed to create the basis on which to build an environment for the commercializati

on of cultural products and services so that persons involved in the cultural industries can be adequately rewarded for their efforts.

An International Perspective

The SVG cultural and creative industries policy objectives also encompass and coincide with the UN Millennium Development Goals, and development objectives enunciated by international agencies such as WIPO and UNCTAD.

- Millennium Development Goals

The Millennium Development Goals were designed as a global pact to: eradicate extreme poverty and hunger, achieve universal primary education, promote gender equality and empower women, reduce child mortality, improve maternal health, combat HIV/AIDS, malaria and other diseases, ensure environmental sustainability and develop a global partnership for development by 2015. It is recognised that the development of the cultural industries in developing countries is a viable strategy for the achievement of these goals, particularly the reduction of poverty, especially given the cross-reaching nature of these industries and the ability to generate jobs and income.

- WIPO Development Agenda

The WIPO Development Agenda arose from a decision of Member States with the objective of ensuring that “developmental considerations form an integral part of WIPO’s work.” The decision consisted of the adoption of Development Agenda recommendations and the establishment of a Committee on Development and Intellectual Property (CDIP). As a direct result and in order to meet the demands of Member States to address the “economic and cultural developmental impact that intellectual property policies and practices have on the creative industries” the Creative Division of WIPO was established.

The main objective of the Division is to provide a focal point for related policy and industry discourse. It engages with creative industry stakeholders and carries out studies on the creative potential of nations, quantifies the economic contribution of creative activities, develops practical tools for creative enterprises and entrepreneurs, and assists creators in benefiting from their intellectual property assets.

- UNCTAD Sao Paulo Consensus

At the UNCTAD XI Ministerial Conference held in São Paulo, Brazil, (June 2004) creative industries were for the first time introduced into the international economic and development agenda following the recommendations of the High-level Panel on Creative Industries and

Development. The Sao Paulo Consensus addresses: development strategies in a globalized world, increasing productivity and international competitiveness; assuring development gains from the international trading system and trade negotiations and partnership for development.

For developing countries a major coup was recognition of the need for “policy space” and flexibility which are necessary for the implementation of national development policies. Paragraph 8 states that "it is particularly important for developing countries, bearing in mind their development goals and objectives, that all countries take into account the need for appropriate balance between national policy space and international disciplines and commitments.”

The text also states that "the increasing interdependence in a globalizing world and the emergence of rule-based international economic regimes have meant that the space for national economic policy (especially in trade, investment and industrial development) is now often framed by international disciplines, commitments and global market considerations.

4.0 The Global Context

International policy initiatives relating to trade in creative and cultural goods, services and intellectual property are increasingly being affected by a number of agreements, instruments and treaties in the multilateral and regional trading system. Some of the more prominent agreements and instruments include:-

1. The WTO General Agreement on Trade in Services (GATS) which covers a range of services that relate to the cultural sector – news agency services, motion pictures, theatrical services, libraries, archives, museums, etc.

2. The WTO General Agreement on Tariffs and Trade (GATT) which covers market access in relation to goods
3. The WTO TRIPS (Trade related aspects of Intellectual Property Rights) which covers copyrights, trademarks, traditional knowledge and geographical indications.
4. The UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions, and the UNESCO Global Alliance on Cultural Diversity, which are created to foster understanding of the policies that can effectively promote cultural diversity while dealing with the challenges associated with trade in cultural goods and services.
5. Regional trade agreements such as the Economic Partnership Agreements (EPAs) between the European Union and the African Caribbean and Pacific countries, and bilateral agreements with the USA.
6. The WIPO Copyright Treaty (WCT) and the WIPO Performances and Phonograms Treaty (WPPT) are designed to update and bring the older copyright and neighbouring rights treaties more in synch with the digital and Internet age; and for this reason are referred to as the WIPO Internet treaties.

- WTO Rules

Trade in cultural goods is subject to the same multilateral trade rules as other goods and services with the exception of screen time quotas for cinematograph films¹⁴ and the general exception for trade in national treasures.¹⁵

- **WTO rules governing trade in goods (GATT)**

The multilateral rules governing trade in goods are contained in the General Agreement on Tariffs and Trade (GATT), which was incorporated in the World Trade Organisation Agreement (WTO). The rules for cultural industries apply to the physical goods that result from the creative process, for example sound recordings, books and arts and crafts.

The rules concerning trade in cultural goods, with some exceptions, speak to:

- Tariffs:

Article II guarantees that WTO members will not apply tariffs on goods imported that are higher than provided for in that Member's schedule.

- Subsidies:

GATT Article XVI and the WTO Agreement on Subsidies and Countervailing Measures prohibit export subsidies and subsidies that promote consumption of local instead of foreign goods.

- Quotas:

General Exceptions (Article XX) allows any WTO member to impose trade barriers to protect national treasures of artistic, historic, or archaeological value.

- Article I most-favoured-nation (MFN) treatment rule prohibits discrimination in applying import tariffs or any other measure affecting trade in goods, between WTO members.

Article III national treatment rule prohibits the discriminatory application of internal trade measures between domestic and imported goods.

¹⁴ GATT Article IV

¹⁵ GATT Article XX

- **WTO rules governing trade in services**

The rules governing trade in cultural services are found in the General Agreement on Trade in Services (GATS) which provides for four modes of delivering services:

1. Cross border - services delivered by the producer in the country of origin to a consumer in another country;
2. Consumption abroad - consumers or firms using a service in another country;
3. Commercial presence – a foreign company setting up subsidiaries or branches to provide services in another country and
4. Presence of natural persons - individuals travelling from their own country to supply services in another country

- **Services Commitments under GATS**

Specific commitments on trade in services of WTO Members under GATS addressing cultural services are contained in the following sectors:

Communication Services

D. Audio-visual services

- a. Motion picture and videotape production and distribution services
- b. Motion picture projection service
- c. Radio and television services
- d. Radio and television transmission services
- e. Sound recording
- f. Other

E. Recreational, Cultural and Sporting Services (other than audio-visual services)

a. Entertainment services (including theatre, live bands and circus services)

b. News agency services

c. Libraries, archives, museums and other cultural services

d. Sporting and other recreational services

e. Other

- UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions

Cultural diversity is defined as “the manifold ways in which cultures of groups and societies find expression” and has its basis in human rights.

The main principles of the Convention are the promotion of intercultural dialogue and understanding and the world’s wealth of cultural diversity. Its aims are:

1. To acknowledge the sovereign right of states to adopt or maintain measures that preserve their cultural heritage and the development of their expressions;
2. To reinforce solidarity and cooperation to rebalance the cultural exchange in favour of developing countries and;
3. To promote cultural exchange in favour of developing countries and promote cultural expression.

The Convention establishes respect for diversity of cultural expression, raises awareness of its value at the local, national and international levels and recognises the fact that cultural goods and services have both an economic and a cultural value. Of particular interest concerning the linkage of culture and sustainable development are:

- Article 2 Para 6 - Principle of sustainable development:

Cultural diversity is a rich asset for individuals and societies. The protection, promotion and maintenance of cultural diversity are an essential requirement for sustainable development for the benefit of present and future generations.

- Article 13 – Integration of culture in sustainable development:

Parties shall endeavour to integrate culture in their development policies at all levels for the creation of conditions conducive to sustainable development and, within this framework, foster aspects relating to the protection and promotion of the diversity of cultural expressions.

- UNESCO's Global Alliance for Cultural Diversity

The Global Alliance for Cultural Diversity is implemented in collaboration with national and international development agencies and the private sector and civil society.

The aims of the Alliance are to:

- Strengthen local cultural industries through:

- i. Providing technical expertise, resources and training, particularly in business-related fields such as marketing, finance, sales and copyright management, elaborating cultural industry policies, developing legislation and regulatory frameworks;
 - ii. Enhancing cooperation amongst public and private sectors in areas relating to culture; and
 - iii. Broadening capacity for cultural enterprise development, entrepreneurship, long-term planning and investment in R&D.
- Prevention of piracy, by assisting governments in developing, updating and/or enforcing copyright legislation and the organization of anti-piracy training programs.
- The Global Alliance Special Fund, to address the potential needs of participating developing countries and countries in transition. The Fund will finance the development of policies and regulatory frameworks necessary for domestic cultural industries to benefit and build on partnership agreements. Sector analyses, design of tax reduction programs and fiscal incentives, development of regulatory mechanisms and copyright enforcement training for judges, lawyers and customs officers will be some of the activities supported by the Fund.
- Economic Partnership Agreements

The CARIFORUM-EU Economic Partnership Agreement (EPA) allows Caribbean firms to invest in the entertainment sector in the EU and grants legally binding market access for the supply of entertainment services. With a few exceptions, all 27 European Union States will allow individual artists in music, dance, theatre, visual arts, sculptors, authors, poets and others unlimited entry for up to 90 days for professional purposes. Access may be subject to qualification requirements and an economic needs test but there are provisions for a regional registration/certification system. To benefit from these provisions as contractual service suppliers, Caribbean artists must be registered as businesses.

The EPA negotiations between CARIFORUM and the EU were highlighted by culmination of the innovative Protocol on Cultural Cooperation (“the Protocol”). The Protocol accommodates those who are not involved in commercial activity but rather seeking to develop collaborative arrangements with EU counterparts. Artists will be able to enter the EU to collaborate on projects and receive training and will be able to stay in the EU for periods up to 90 days in any 12 month period and under the cooperation agreement will not have to be registered companies.

The Protocol provides for bi-lateral cooperation in all spheres of the cultural industries sector and aims to improve the conditions governing the exchange of cultural activities, goods and services and redressing structural imbalances. It also provides for technical assistance through training, information exchange, expertise and counselling as well as in the use and transfer of technology and know-how and this support includes cooperation between private companies, NGOs and public-private sector partnerships.

It is notable that it has been reported that although there was some education on the provisions of the EPA through the Ministry of Foreign Affairs when the EPA was first signed there has been very little public information provided and no specific programmes offered to cultural industry participants.

Summary of International Policy Perspective

For developing countries like St. Vincent and the Grenadines, international trade in cultural goods, services and intellectual property is challenging. The rapidly changing methods of production and distribution of cultural content, fuelled by the digital and Internet revolution, and e-commerce, as well as the resultant international guidelines, agreements and regulations, demand that developing states adjust swiftly to take advantage of the new digital opportunities.

Most developing states also face the dilemma of reconciling the liberalization of trade in cultural goods and services under the WTO and regional trade agreements, and the promotion of cultural diversity through the UNESCO convention. The UNESCO convention calls for the signatories to incorporate culture into sustainable development and for international cooperation to support the development of the cultural industries and policies in developing countries through technology transfer, financial support and preferential treatment.

5.0 The Regional Context

Over the past ten or so years the development of cultural and creative industries within the Caribbean has been the subject of many research, capacity building and marketing initiatives spearheaded by various regional institutions. Initiatives have ranged from collective CARICOM, CARIFORUM and OECS projects and programmes to initiatives specific to individual countries in the region.

The work and role of several regional institutions must be a factor in the design of the SVG policy framework, and strategy plan. The following should be taken into consideration:

- CARICOM Task Force on Cultural Industries Development

The CARICOM Regional Task Force on Cultural Industries was officially launched in October 2008, and operates under a mandate by the Second Joint Meeting of the CARICOM Council for Trade and Economic Development (COTED) and the Council for Human and Social Development (COHSOD). The mandate of the Task Force is to prepare a Regional Development Strategy and Action Plan for cultural industries.

The Task Force was established in recognition of the acknowledgement by regional governments that the development of dynamic, indigenous cultural industries is a potentially important strategy to reduce susceptibility to dramatic and external shocks in the world economy. The decision to establish the task force is hinged on demonstrated comparative advantage of several Caribbean countries in cultural industries, especially music, art, craft, fashion, festivals and cultural tourism and the potential for the building of competitive export industries in these areas. The establishment of the Task Force is a follow up to the presentation in 2006 of the study entitled “The Cultural Industries in CARICOM: Trade and Development Challenges” commissioned by the Caribbean Regional Negotiating Machinery (CRNM) and prepared in consultation with regional culture officials and industry representatives.

The responsibilities of the Regional Task Force on Cultural Industries include:

1. The review of relevant policies, mandates, studies and other documents related to cultural industries in CARICOM;
2. Preparation of a comprehensive Regional Development Strategy and Action Plan for the cultural industries in CARICOM, including specific recommendations for:
 - Priority actions arising from the CRNM commissioned study “The Cultural Industries in CARICOM: Trade and Development Challenges and other relevant studies;”
 - An appropriate incentives regime and financing mechanism for the cultural industries, including an approach to providing relief from tariffs and other duties and charges on products that are inputs to cultural industries, and the development of an Additional Conditional Duty Exemption;
 - The data to be included in national registries of artists and cultural workers;
 - Resolving classification issues related to cultural products and services;

- Addressing difficulties encountered by artists in free movement under the CSME;
 - Actions to ensure the appropriate treatment of culture in trade negotiations and trade agreements with third states;
 - Strengthening regional institutions in culture, especially CARIFESTA and the CARICOM Foundation for Art and Culture given their pivotal role in regional cultural industry development, and taking into account the recommendations made in the CARIFESTA Strategic Plan and the Report of the Legal Consultant on CARIFESTA.
3. Engage in consultations on issues that affect the development of the cultural industries, with government authorities and stakeholders in education, tourism and ICTs.
- The Caribbean Regional Negotiating Machinery (CRNM) - Now the Office of Trade Negotiations (OTN)

In keeping with the decision of the 30th Meeting of the Conference of Heads of Government of the Caribbean Community (CARICOM) in July 2009, the CRNM is now referred to as the Office of Trade Negotiations (OTN). The CRNM/OTN is now incorporated into the CARICOM Secretariat as a Specialised Department, recognizing and providing for the special nature of its role and functions. The CRNM, as the Office of Trade Negotiations of the CARICOM Secretariat, now has extended responsibility for the coordination, development, and execution of negotiating strategies for all Community external trade negotiations.

The CRNM is responsible for developing and maintaining a cohesive and effective framework for the coordination and management of the Caribbean's external trade negotiation resources and

expertise. Our mission is to help Member States maximize the benefits of participating in global trade negotiations by

- Providing sound advice
- Facilitating the generation of national positions
- Coordinating the formulation of a cohesive negotiating strategy
- Leading negotiations where appropriate

The CRNM engages in negotiations on four general levels:

- Multilateral Level – This includes negotiations within the World Trade Organization (WTO);
- Inter-regional Level – This includes the negotiations of the Economic Partnership Agreement (EPA) with the European Union;
- The Organisation of Eastern Caribbean States (OECS)

The mission of the OECS is to be a major regional institution contributing to the sustainable development of the OECS Member States by assisting them to maximise the benefits from their collective space, by facilitating their intelligent integration with the global economy; by contributing to policy and program formulation and execution in respect of regional and international issues, and by facilitation of bilateral and multilateral co-operation.

The Export Development Unit (EDU) of the OECS was established in November, 1997 in Roseau, Commonwealth of Dominica to promote non-traditional exports. The EDU Services Division includes an Entertainment Services department. Through its technical departments the EDU provides services in the following areas:

Strategic Planning and Resource Mobilization

- Program Planning
- Project Preparation
- Funding Proposals

Technical Advisory Services

- Business Plan/Marketing Plan Preparation
 - Management
 - Quality Assistance
 - Technical Assistance Recruitment Management
 - Computerization and Information Technology
 - Direct Enterprise Assistance

 - Product Design and Development
 - Product Systems (ISO Certification)
 - Produce Certification (HACCP)
 - Labeling/Packaging
 - Research (Equipment/Raw Material Procurement)
 - Market Intelligence

 - Trade data - Compilation/Analysis
 - Market Prices/Trend Analysis
 - Research (Market Survey)
 - Export Promotion and Marketing

 - Test Marketing
 - Promotion Material
 - Web Site Development
 - Trade Fair/Mission Attendance
 - Trade Facilitation
 - DOMS (French West Indies) Facilitation Service
-
- Caribbean Export Development Agency

Caribbean Export is the only regional trade and investment promotion agency in the African, Caribbean and Pacific (ACP) group and was established by an Inter-Governmental Agreement of the 15 Member States of CARIFORUM. It operates with offices in Barbados and the Dominican Republic with collaborative links with the French Caribbean Outermost Regions (FCORs), the English and Dutch Overseas Countries and Territories (OCTs), and Cuba.

Caribbean Export's activities in the area of the cultural industries include the staging of the annual Caribbean Gift and Craft Show, the facilitation of funding for market access initiatives, and the support of research, such as the commissioning of studies on the Caribbean cultural industries (The Caribbean Music Industry – 2001 by Dr. Keith Nurse).

The provision of technical assistance to companies and artistes, support to national and regional seminars and creative industries conferences and study tours of the World Music Expo (WOMEX), MIDEM (the world's largest music industry trade fair), and by Caribbean music-related Business Support Organizations (BSOs), are examples of some of the types of support provided by Caribbean Export over the years.

Caribbean Export's Caribbean Gift and Craft Show provides an annual facility and vehicle for business networking and trade for regionally produced gifts, craft, fashion and jewelry, and has attracted participation from several producers from SVG.

- Caribbean Copyright Link (CCL)

The Caribbean Copyright Link (CCL) consists of Founding Members:

1. Copyright Society of Composers, Authors & Publishers Incorporated (COSCAP) – Barbados
2. Copyright Organisation of Trinidad and Tobago (COTT) – Trinidad
3. Jamaica Association of Composers, Authors and Publishers Limited (JACAP) – Jamaica

4. Hewanorra Musical Societies (HMS) now renamed Eastern Caribbean Copyright Collective for Music Rights (ECCO) – OECS

Associate members include ACDAM (Cuba), SASUR (Suriname) and BSCAP (Belize). Together, these organisations represent over 2,500 creators in the region. St. Vincent and the Grenadines have established membership with ECCO and a local agent and director has been identified.

The CCL was established following the first World Intellectual Property Organisation (WIPO) inter-Ministerial Level meeting on Intellectual Property for CARICOM countries held in 1998 when Ministers with responsibility requested assistance from WIPO in the creation of a regional system for collective management of copyright and related rights. At the second WIPO-Ministerial Level Meeting in 1999, the Ministers requested WIPO to develop a Regional System for Collective Management.

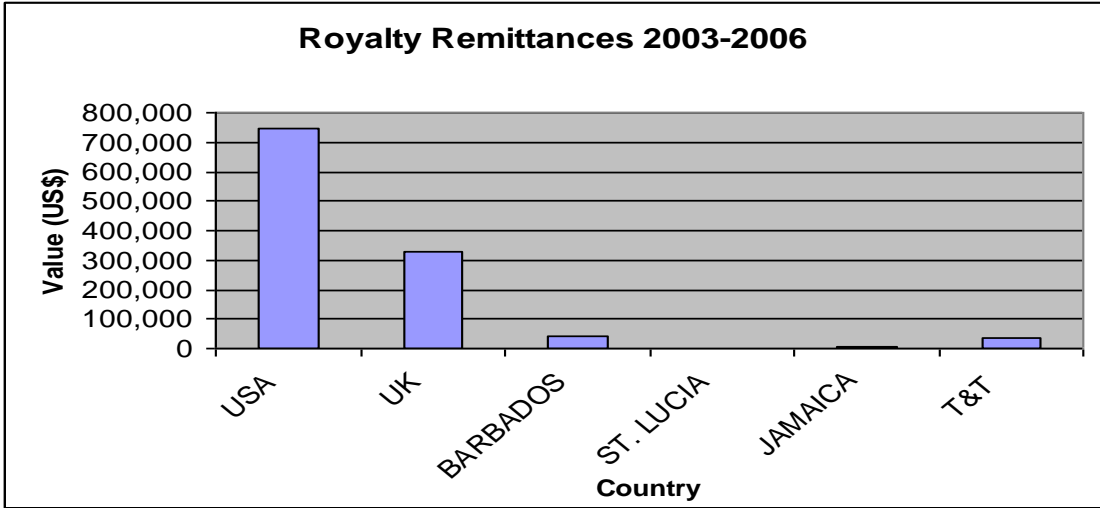
The members of the CCL have achieved a number of successes since inception. These include:

- Growing membership (over 5,000 in the territories of the Founding Members) and repertoire
- Increased interest and activity in the music industry in areas beyond artistic performances, especially in terms of music publishing and related business activities
- Local, regional and international recognition
- Increasing licensing collections
- Access to top of the line technology and databases
- Growing internal expertise

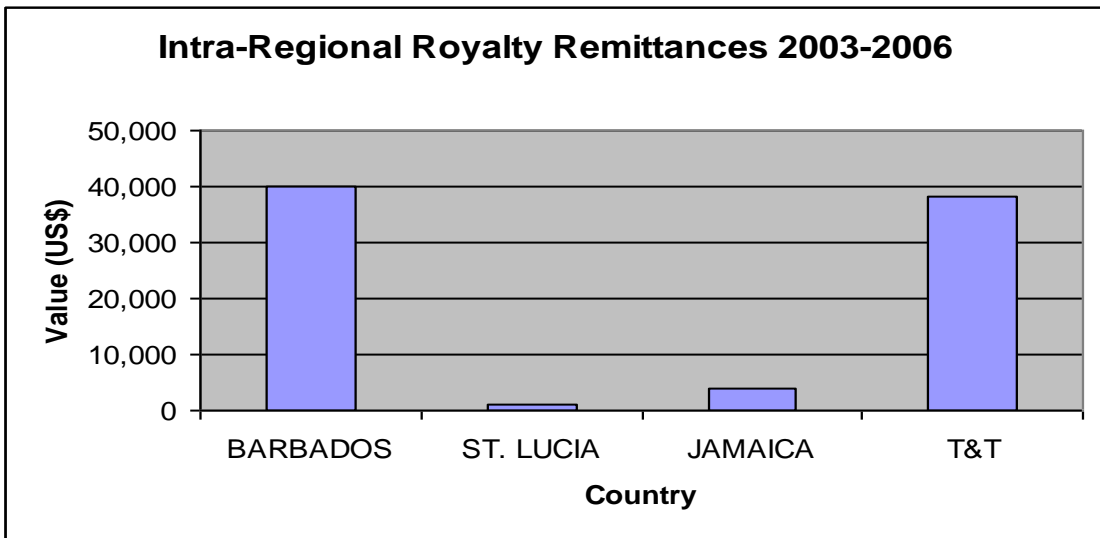
However, there are also a number of on-going challenges which threaten to diminish the achievements. These include:

- Continued high levels of resistance and non-compliance
- High operating costs
- Slow and expensive judicial systems
- The treatment of copyright infringement and piracy as “soft” and “victimless” crimes
- The low levels of real support from some Governments which means that the CMOs are forced to function with very limited resources
- The high level of extra-regional remittances which make the region a net-exporter of royalties
- The low levels of reported use of local and regional music
- The existence of a intra-regional non-resident withholding tax rate for royalties which is higher than the rates for our major markets

The first chart below shows the total royalties exported to the main export territories – UK, USA & CARICOM between 2003 and 2008. Other significant markets not included are Australia, Canada and Europe.



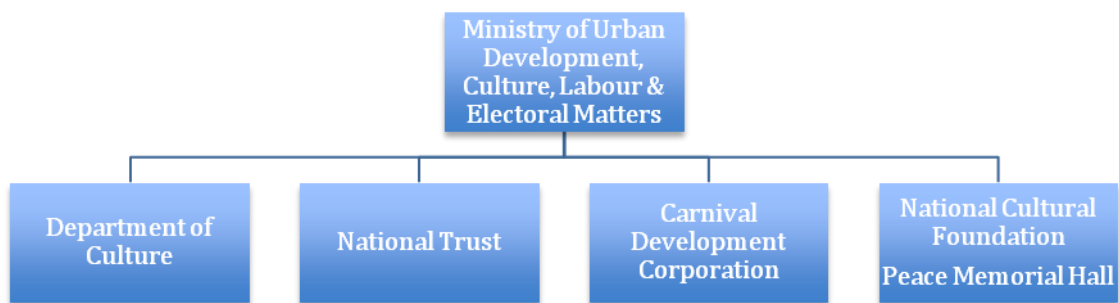
The second chart shows the exchange of royalties amongst the territories of the Founding Members, the payments paid to regional rights owners are comparatively and in most cases extremely low compared with those made to American and English societies.



6.0 The National Context

6.1 Institutional Framework (public)

Appropriately structured and efficiently managed relevant public and private institutions perform a critical role in industry development.



- Role of the Ministry of Culture

The responsibilities of the Ministry of Culture are to manage, develop, and advise on all aspects of cultural development. Its objectives include:

- The establishment of appropriate institutions.
- The stimulation of creative potential
- The preservation and conservation of cultural heritage by working with the following institutions:

- National Cultural Foundation
- National Trust
- Memorial Hall Board
- Carnival Development Cooperation (CDC)

The services offered by the Department of Culture are:

- Sharing and documenting of information
- Providing training in areas of the performing arts
- Organizing events (festivals, shows, lectures etc)
- Providing advice and project planning assistance to groups and institutions
- Providing some financial support to national cultural institutions

The Department of Culture is totally Government funded and also benefits from some corporate sponsorship for activities such as the Lime Secondary School Drama Festival. The National Lottery also provides funding for sports and culture but is administered by the Ministry of Finance and although there is occasional consultation with the Ministry of Culture, this is not a policy obligation. The Department maintains a close relationship with the Ministry of Education with joint programmes, the result of culture and education previously being under the same Ministry. As a result, whilst dance and drama officers fall under the Ministry of Culture, music officers fall under the Ministry of Education.

- Role of the Carnival Development Corporation

The Carnival Development Corporation (CDC) was established as a legal entity in 2002 under the Carnival Development Corporation Act 2002. It operates year round with a full-time staff complement; its functions include:

- Coordination of all carnival activities;
- Developing and implementing marketing strategies for the promotion of Carnival and other festivals;
- Securing financial and other sponsorship for the carnival.

The CDC is the only entity administered by the Ministry of Culture which is financially independent in the sense that it is able to pay expenditure directly. The main sources of funding for the CDC are

1. Annual Government Subvention
2. Private sector sponsorship
3. Gate Receipts collected from events during Carnival
4. Rental of the canopy and stage throughout the year

The breakdown of sources of income for the CDC 2001-2003 were:

Figure 9 Sources of Carnival Revenue for CDC

EC\$

	2003	2002	2001
Items			

Gate Receipts	319,488	431,098	178,381
Government Subvention	300,000	300,000	275,000
Donations and sponsorship	829,881	637,625	626,022
Other	69,130	70,595	90,930
Total	1,518,449	1,439,568	1,170,333

(Shaw 2005)

The amount shown as private sector donation and sponsorship does not include direct contributions to the components of Carnival defined as the Carnival Bands Association, Calypsonians' Association, Youlou Pan Movement and sponsorship of rural shows.

Importantly, the CDC administers the incentive programme for the relief of duty on Carnival supplies which include: CDs with local content, tee-shirts to be printed with Carnival slogans for bands, but does not include electronic equipment and instruments. Interpretation of what goods meet the requirements are left to the determination of the Cabinet of the government of St. Vincent and the Grenadines.

The primary challenges facing the CDC are:

1. Continued operating deficit of approximately EC\$1 million
2. Financial constraints have limited the ability of the CDC to engage in long-term planning and capacity building (Shaw 2005)
3. Lack of professionalism from Carnival participants

Nonetheless, the CDC in its Budget Proposal Summary for the year ending 31 August 2010 following a general review of the 2009 Carnival has removed some shows from the calendar of events due to a lack of financing. It has also proposed training programmes to include training for young designers, judges' and calypsonians' workshops. Recognizing the importance of intellectual property rights especially copyright and artist management and image development, it is also planning to provide financial support to relevant workshops. There is present consideration to alternative funding opportunities for training and development. Following the 2009 review the Rural Carnival Committees was also expanded with the hope of greater diversification and enhancement of product. The 2010 budget is an estimated EC\$2,309,000 including a Government subvention of \$575,000, and from the National Lotteries, EC\$700,000.

- Role of the National Cultural Foundation

The stated functions of the National Cultural Foundation (NCF) are:

- To stimulate and facilitate the development of dance, music, literature, drama, fine arts and culture generally;
- To develop, maintain and manage theatres, libraries and other cultural facilities and equipment provided by the government;
- To organise cultural festivals;
- To do anything necessary or desirable to assist persons interested in developing cultural expression.
- The NCF was established in 2004 but has unfortunately remained largely inactive although it has a board of directors. It is hoped that it will be financially independent and undertake specific projects.

- Role of the St. Vincent & the Grenadines National Trust

The National Trust was established to assist with the preservation, promotion and management of national cultural heritage sites and to safeguard the cultural patrimony of the country. It is a statutory organization with a Board of Trustees and it is presently developing plans for the creation of a National Museum and Art Gallery. The Trust is expected to play an important role in the preservation and promotion of the nation's cultural heritage and in safeguarding such for posterity. In addition to a subvention from Government, the Trust is able to seek external funding and it is involved in providing policy guidelines.

- Peace Memorial Hall

The St. Vincent Peace Memorial Hall is a major venue and operates to provide space for conventions and presentations in the arts – primarily dramatic and theatrical performance. It operates with a Government appointed Board of Directors and is financially independent. Its objectives include:

- To establish the Hall as a nursery for performing artistes,
- To position the Hall as an attractive venue for conferences and seminars.

Commerce and Intellectual Property Office (CIPO)

CIPO is a statutory agency and falls under the Ministry of Legal Affairs; it was established in 2003 and began operations in 2004. It is responsible for copyright and industrial property. Its intellectual property services include:

The processing of applications for the registration of:

- business names
- societies (social clubs)
- domestic companies
- external companies
- trade marks
- patents
- geographical indications
- collective societies

CIPO administers 8 enactments and is concerned with the implementation of 4 international conventions. Its legislative portfolio is as follows:

- Companies Act, 1994
- Companies Regulations, 1996
- Registration of Business Names Act, Cap. 111
- Registration of Business Names Fees Regulations, 1981
- Societies Act, Cap. 330
- Trade Marks Act, 2003
- Trade Marks Regulations, 2004
- Patents Act, Cap. 110
- Patents (Amendment) Rules, 1998
- Patents Act 204
- Layout Designs of Integrated Circuits Act 2005
- Industrial Designs Act 2005
- Copyright Act, 2003
- Copyright (Specified Countries) Order, 2005
- Geographical Indications Act, 2004

Its operations are determined on an annual basis through a programme of activities. It provides some public awareness activities including brochures, information booths, posters, motorcades, radio programmes, print and electronic advertisements and through its website. It does collaborate with the Ministry of Culture but has no joint programmes with the Ministry of Education and limited interaction with the Ministry of Science, Industry and Technology. Staff and the general public have also benefited from training programmes with WIPO, OAS and the WHO.

Centre for Enterprise Development (CED)

The CED is a Government enterprise with a board of directors under the Ministry of Science, Industry and Technology. It was established in 2005, taking over the operations of the Small Enterprise Development Unit. The CED facilitates private sector development through training, business counseling, business research, training attachments and business incubators. It operates in St. Lucia, Grenada and Antigua and Barbuda where its main clients are the Caribbean Development Bank and the Eastern Caribbean Central Bank. Its activities are demand driven and it is funded through project financing from the European Union and provides its services on a fee basis as it is mandated to be self financing. It works closely with the SVG Small Business Association, Invest SVG and the SVG Chamber of Commerce and Industry; it does not directly offer financing although incubator clients are provided a small stipend. There are presently considerations by Government to offer equity financing and to establish a loan guarantee scheme.

Invest SVG (Formerly known as National Investment Promotions, Inc. /NIPI)

Invest SVG is a re-branding of the National Investment Promotions, Inc (NIPI) which was established to facilitate sustainable economic growth in St. Vincent and the Grenadines by providing Investment Promotion, Export Development, Business Facilitation and Research Services to potential and existing local and foreign investors and Government Agencies. In its early years the focus of NIPI (Invest SVG) was to look outward with a view to attracting foreign investment and the marketing of financial services. Today there is mixed emphasis on the promotion and encouragement of foreign investment on the one hand, and the promotion of local export oriented ventures, along with the provision of after care services for these ventures.

The Export Development Department of Invest SVG is set up to develop the export capacity and improve the competitiveness of export-oriented businesses involved in the production of value

added products and services in key sectors. The cultural and creative industry sector is considered a part of the Invest SVG export promotion portfolio in accordance with the position stated in the National Export Strategy. Even though the creative and cultural industry is not specifically mentioned in Invest SVG publicity documentation as a targeted sector, there is mention of a plan to bring more focus to and reinforce the activities in Invest SVG as regards the sector. There is however no specific time-table set for this to take place.

The Objectives, Strategies and Export Services of the Invest SVG Export Development Department provide potential for beneficial inputs to the development of the cultural and creative industry as outlined as follows:

Objectives

- To facilitate increased market penetration and build the productive capacity of export oriented businesses
- To position the Invest SVG as an effective Export Promotion Agency
- To deliver value-added consultancy services through effective client management

Strategies

- Focus on select sectors within the National Export Strategy (NES) framework.
- Focus on select companies with potential for significant export growth by providing value added services
- Leverage resources by accessing grant funds to carry out developmental initiatives
- Partner with regional offices and external affiliates in developing and implementing Market Development Programs.
- Deliver a range of specialized services and information to address the needs of the export community
- Leverage resources by charging users for select services

- Participate in policy discussions which will promote export development

Export Services

- Exporter Registration
- Information on Export Procedures
- Exporter Readiness Assessment
- Information re market access
- Country profile
- Customs and Trade –Relate Documents e.g. Trade Agreements , info re rules of origin
- Trade Statistics
- Exporter Directory
- Marketing and Promotion
- Export Showcase
- Specialized Industry Studies and research
- Lobbying , advocacy and policy recommendation
- Technical Assistance

6.2 Institutional Framework (Private Sector)

SVG Create a private NGO was incorporated and established in 1996 to represent artisans, and functioned for a number of years, but has been dormant recently. The Calypsonians Association exists without a secretariat and has inadequate funding. The Youlou Pan Movement has been in operation for several years but requires a clearly defined structure and development plan. The SVG Music Association focused on classical music, including the promotion of an annual festival, but has been dormant in recent years.

The SVG chapter of the Eastern Caribbean Copyright Organization/ECCO has been recently established to represent the collective rights management interests of persons in the music industry, and receives support from the ECCO headquarters in St. Lucia and the Caribbean Copyright Link/CCL. The recently formed SVG Coalition of Services Industries/CIS was established to represent a wide range of operators in the services sector, and places significant emphasis on the cultural and creative industries. The CIS has also done work towards the preparation of a Strategic Action Plan for the SVG creative industries.

The National Development Foundation of St. Vincent and the Grenadines (NDFSVM) is a private non-profit development agency incorporated in 1983 with the aim of providing self-help development through micro-loans, technical assistance and training. It has established a Business Support Centre to provide the following services under three main areas – business management training and entrepreneurial development, technical assistance and a management accountant centre:

- efficient management practices
- proper accounting records
- clerical support
- forecasting techniques.
- quality and standards.
- market assessments
- technical information packages related to new and improved technology
- human resource management

6.3 Capacity Building and Product Development

A professional cadre of industry participants supported by access to skills upgrading facilities provides the engine for growth in the cultural industries. A public/private partnership with local and international participants is required to address the infrastructure and training service needs at the primary, secondary and tertiary levels. The special needs relating to short term training within the cultural industries environment in the form of workshops and online delivery of training materials is essential.

The digital revolution continues to bring sweeping changes to the approach to production, promotion and distribution of cultural goods and services. SVG appears to be lagging behind in the adaptation and regular use of basic communications technologies such as emails and websites. Email and website use, as well as integration into the online social networking world of MySpace, Facebook, and Twitter must be encouraged. The growth in trade in digital cultural products and services globally dictates that emphasis be placed on capacity upgrading in these areas as a matter of immediate priority.

Sector Linkages

St. Vincent and the Grenadines, like most Caribbean countries, has demonstrated its competence and ability to provide a globally competitive tourism product. Successful SVG tourism operations provide great marketing and branding opportunities for all types of SVG products and services. The digital revolution and its impact on the methods of production, promotion and delivery of cultural goods and services now provide clear opportunities for developing states that are rich in culture. An excellent case can therefore be made for the pursuit in SVG of mutually beneficial collaborative linkages between the tourism, information technology, and creative and cultural industries. Strategic alliances between the SVG Coalition of Services Industries, Invest SVG, the SVG Tourism Authority, and other relevant state agencies

with responsibility for information and communication technologies should be a priority area of focus to allow for the implementation of a meaningful SVG cultural industries development policy.

6.4 SWOT Analysis of Vincentian Cultural Industries

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Caribbean cultural is unique and diverse and is well-known and popular around the world. • Proven international competitiveness of products based on individual successes • Expanding interest and participation by the youth population in entertainment industry • Intellectual Property laws fairly updated. • Synergies with successful tourism industry provide global branding and promotion opportunities 	<ul style="list-style-type: none"> • Slow pace of adaptation to online technology and e-commerce • Inadequate audio-visual production facilities and high costs of production • Inadequate spaces for performance presentations and exhibits • Inadequate local training facilities and poor institutional infrastructure • Low skills levels and lack of technical support in management, entertainment law, and product development and marketing • Disconnect with international distribution mechanisms

OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Digital cultural products and services represent the fastest growth segment of global market for cultural goods and services. • Success of Kevin Lyttle and other Caribbean music performers has created increased interest in Caribbean music, dance and fashion. • Large global Caribbean population and friends of Caribbean culture provide audience for global media products. • Growing recognition among private sector enterprises of the value of investing in the music industry. • Low cost of online marketing. 	<ul style="list-style-type: none"> • Increased local penetration by foreign cultural products such as music • Continued low levels of domestic media support for local content • Piracy and poor enforcement of IP laws • Limited seasonal focus based on over-emphasis on Carnival. • Economic downturn • Lack of appreciation by policy makers and business leaders of the commercial and industrial value of cultural activities

6.5 Challenges in the development of the Cultural Industries

- Most cultural industries participants are involved only in part-time activity and lack professionalism and the necessary business skills to maximise returns and to achieve operational efficiency;
- Lack of adequate level of expertise in ancillary and support services specific to the cultural industries;

- Difficulties accessing financing due to lack of business skills, part-time activity and most importantly, due to the reliance on intellectual and intangible assets which are not recognised as adequate forms of collateral by banking community;
- Lack of market information and research;
- Supply constraints which result in an inability to source inputs and therefore to meet demand and ensure quality in a consistent manner.

7.0 Cultural Industries and Tourism

Cultural tourism is defined as “the movement of people motivated by cultural intents such as study tours, performing arts, festivals, cultural events, visits to sites and monuments as well as travel for pilgrimage. Cultural tourism is also about immersion in and enjoyment of the lifestyle of the local people, the local area and what constitutes its identity and character” (World Tourism Organization). It is the fastest growing segment of international tourism.

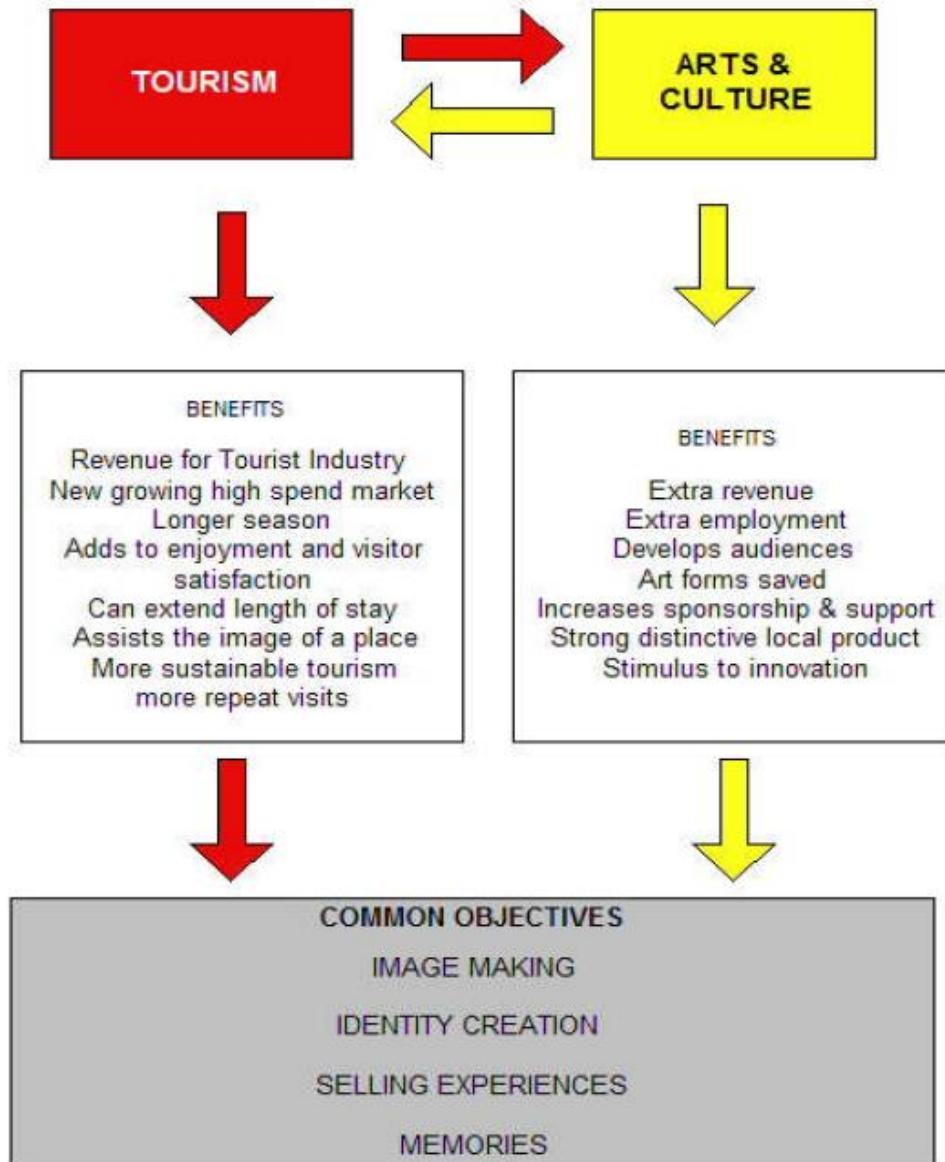
Trends affecting cultural tourism include¹⁶:

- The shift from ‘passive consumer’ to active participant
- The search for ‘authenticity’ in various forms.
- The importance of the distinctiveness of *place*
- A shift towards an ‘experience-based’ tourism economy
- The importance of learning and interpretation
- The importance of experience-based self-development

¹⁶ (Perfect Moment and Cultural Capital Ltd. 2004)

- The development of a new and more interactive relationship between 'hosts' and 'guests'.

DYNAMICS & SYNERGIES OF CULTURAL TOURISM



Adapted from Journey Further: an arts and Cultural Tourism Strategy for Western Australia 2004

Source: Local Distinctiveness – Global Potential: Adding Value to Tourism with Culture A Discussion and Issues Paper for the Essex Arts Officers Group Consultation Version For Cluster Groups Part of a Cultural Tourism Consultancy for Essex Arts Officers Group Perfect Moment & Cultural Capital Ltd March 2004

Tourism represents the main services sub-sector for SVG and in 2007 there was an increase of 16.5% in total arrivals over the previous year. However, with the global economic recession, a decrease in tourist arrivals has been experienced during the first six months of 2009 with an overall drop of 17% compared with the previous year. The main markets for the island are CARICOM, United Kingdom, USA and the rest of Europe. As of 2005, there were 2,198 hotel rooms available ranging from lower budget in St. Vincent and high-end luxury accommodation in the Grenadines. The importance of tourism to the Vincentian cultural industries cannot be overstated in terms of the opportunities offered to display, perform and generate revenue from the offer of cultural goods and services; similarly, tourists are attracted to the island as a destination not only for sun and sand but also to experience its unique cultural offerings.

Key Tourism Statistics for St. Vincent & the Grenadines

	2009	2008	2006
Jan	6,444	6,370	7,943
Feb	6,049	7,976	7,404
Mar	7,065	7,664	9,345
Apr	6,704	6,567	10,581
May	4,676	6,131	6,359
June	4,347	8,020	8,470
July	n/a	10,171	11,373

August	n/a	7,257	8,316
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Main Tourist Markets

Jan- June 2009

USA	Canada	Europe	Other
9,902	3,668	9,769	11,946

Source: Caribbean Tourism Organisation

Vincy Mas

During the premier cultural event, Carnival, there is no major increase in stay-over arrivals in commercial accommodations but there is an overall increase in arrivals suggesting the use of domestic accommodation, implying mainly Diaspora visitors. The 2005 study of the economic contribution of Carnival¹⁷ revealed that expenditure by tourists and locals during Carnival in 2003 and 2004 was between EC\$10.2 and \$10.3 million. It was further revealed that visitors staying in hotels spend more than those in other paid accommodation. The study states that there is a 60:40 ratio between tourists staying in other paid accommodation (guest houses, resorts and villas) and those staying in hotels, and assuming the industry average of eight days per stay over visitor, the average expenditure for hotel guests is EC\$339.57.

¹⁷ (Shaw 2005)

During the Carnival season there is a noted increase of economic activity in the following areas (Shaw 2005):

- Passenger carrier by airlines
- Activity by taxis and omnibuses
- The local music industry
- Hotels and restaurants
- Manufacturing output related to Carnival
- Formal and informal sector commercial activity

In addition to the subvention provided to the CDC, there is expenditure on advertising and promotion of the Carnival within the Ministry of Tourism's promotion budget which is reported to have been EC\$2.4 million in 2003 and increased to EC\$5.9 million in 2005.

Another major festival, Nine Mornings attracts primarily Vincentians living abroad as it is not well known outside of the local community. There are very few hotels offering live performances, previously, there was a cost-sharing initiative among hotels where each hotel would feature live music one night a week and guests from other hotels were encouraged to patronize that particular hotel, but this no longer takes place.

Tourists are mainly interested in craft but prefer fine art, further there have been comments that local art is not properly finished or packaged for travel. Additionally, insufficient information is provided as tourists like to have documentation for the interpretation of the pieces purchased. In terms of local cuisine, few restaurants catering to tourists offer traditional

cuisine but the St. Vincent and the Grenadines Hotel and Tourism Authority produces the Vincy Flavours festival, a food and beverage exhibition and competition.

The St. Vincent and the Grenadines Hotel and Tourism Association, the Ministry of Tourism and occasionally Vincentian embassies overseas do include entertainers and artisans in delegations going overseas and distribute local products, but this is not done in any systematic manner.

Challenges to increasing linkages with tourism and culture are:

1. The hospitality sector believes that artists have false perceptions about the profit line of hotels and therefore price themselves out of the market;
2. Local artists are regarded as unprofessional;
3. On the other hand, local cultural practitioners believe that the hospitality sector underprices the value of their goods and services; and
4. There is no real interest in the promotion of local culture.

Recommendations

1. Improve collection of data from tourists as recommended in study by Shaw – this could include forms to capture visitor arrivals information to ascertain type of accommodation, motivation for visit;
2. Increase coordination of policy-making and promotional activities between CDC, Ministry of Tourism and private sector (particularly, SVG Hotel and Tourism Association);
3. Increase promotional activities to encourage tourists to stay in hotels.

8.0 Cultural Industries and Technology

The role of Information and Communication Technologies (ICT) as a major driver in the development of the cultural industries cannot be overstated. Access and the successful utilization of ICTs provide significant opportunities for the competitiveness of cultural industries practitioners in a globalized environment. The fastest growing segment of the global cultural industries market is also in the area of digital and online content. This has been made possible through:

- Lower costs (communication to consumers, suppliers and distributors)
- Access to information – market research, trend analysis
- Access to technology – new cheaper digital technologies
- Access to markets, improved competitive position and business expansion – direct advertising, marketing and sales to consumers through e-commerce through new distribution channel in global environment
- Employment generation through the creation of online businesses

Internationally, most countries have adopted strategic policy positions to ensure that the development of the ICT sector is given priority. In the developing world and transitioning economies, Asia, Eastern European and the Middle East, ICT and in particular broadband access are viewed as important developmental tools. The predominance of ICT, in particular broadband access has been reinforced by the recent initiative in Finland, which has become the first country worldwide to grant a legal right to high-speed broadband internet access. Under this initiative telecommunications companies will be obliged to provide all Finnish residents with

broadband lines that can run at speeds of at least 1 megabit per second. Finland already has an internet penetration rate of 96% but it is hoped that this action will improve availability in the more remote rural areas, improve the quality of life and promote business and online banking.

In the absence of a focused ICT strategy, the problem of the “digital divide” becomes more manifest. The digital divide speaks to an economy that is knowledge and information led; the difference between those with access to information and those without, with implications on the eradication of poverty and economic development. The productivity and competitiveness of participants depend on the capacity to generate process and efficiently apply this knowledge-based information:

- information leads to resources;
- information leads to opportunities that generate resources;
- access to information leads to access to resources; and
- access to information leads to access to opportunities that generate resources.

In the English speaking Caribbean the cost of internet access is high but internet penetration in St. Vincent and the Grenadines remains relatively high, but with slow speed in spite of fibre optic cables on the island.

Internet Penetration as of June 09

No. of users	% penetration
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St. Vincent	66,000	63.1
Barbados	188,000	66.1
Antigua	65,000	75.9
Trinidad & Tobago	212,800	17.3
Grenada	23,000	25.5
Caribbean	9,140,700	22.4

Source: <http://www.internetworldstats.com/carib.htm>

Download Speeds:

St. Lucia	3.16 Mbps
Grenada	2.93 Mbps
Trinidad & Tobago	2.89 Mbps
Antigua/Barbuda	1.82 Mbps
St. Vincent	1.72 Mbps

Ranking of Countries by Download Speed

1. 20.43 Mb/s Korea, Republic of
2. 15.77 Mb/s Japan
3. 14.43 Mb/s Aland Islands
4. 12.94 Mb/s Lithuania
5. 12.83 Mb/s Sweden
96. 1.72 Mb/s St. Vincent & the Grenadines

Top Countries by Upload Speed

1. 8.79 Mb/s Lithuania
2. 7.07 Mb/s Japan
3. 5.43 Mb/s Bulgaria
4. 5.09 Mb/s Aland Islands
5. 4.98 Mb/s Latvia
98. 0.43 Mb/s St. Vincent & the Grenadines

Source: www.speedtest.net

There have been efforts to develop the ICT sector generally in SVG through the development of a legislative and regulatory framework which aim to increase human capacity and infrastructural development, but the sector is still very much in the formative stages. There is the Information and Communication Technology Investment Incentives Act which seeks to encourage and facilitate investment in the information and communication technology sector and stimulate employment in and the development of the private sector in St. Vincent and the Grenadines. There is also the St. Vincent and the Grenadines Electronic Transactions Act 2007 which has as its primary objective the facilitation and regulation of electronic communications and transactions to prevent abuse of information systems.

Funding has been received from a variety of donors to provide training and services. Some of the training programmes which might have some direct or indirect impact on the cultural sectors include:

- National Information and Communication Technology Training Project (NICTTP) - to further the promotion and development of ICT by providing a cadre of trained persons with various levels of computer skills, local labor competitiveness and employability of the labor force.
- Public Sector Intranet Development - to fully operationalize an electronic Intra-Ministerial agency communications system within the Public Service.
- Telecom Skills Project - to strengthen the institutional capacity of the NTRC and the Ministry of Telecommunications, Science, Technology and Industry.
- Special Framework of Assistance 2005 - to improve economic diversification, competitiveness and employment capacity in the productive sectors through creating the appropriate environment and human resource pool for the introduction and sustainable use of ICT.
- Reducing Rural Poverty through Entrepreneurship Development (RRPED) - to reduce poverty by assisting individuals in rural areas in starting up businesses. This is an Organisation of American States (OAS) project with the assistance of the Centre for Enterprise Development (CED).

The CED is also undertaking other ICT training initiatives under its Business Skills Development and e-Business Incubators project which includes the National e-business Incubator programme. The CED is offering training for local ICT related consultants and trainers and business skills development that are ICT driven.

Another major initiative being undertaken is the Universal Service Fund which is to be used to compensate any Telecommunication provider who is required to provide Universal Service or to promote Universal Service. The Fund aims to encourage efficient access to, and use of the telecommunication networks and services throughout St Vincent and the Grenadines, with special focus on rural, under- served and maritime areas, with a goal to help promote social, educational and economic development.

The Fund will also ensure the reasonable availability and affordability of basic and advanced telecommunications services, where the commercial telecommunications market may be unable to deliver such services in a financially, viable manner independently, and also to the physically challenged, elderly and indigent communities. The Fund will also provide support for the introduction and expansion of telecommunications services to schools, health facilities and other organizations serving public needs.

Presently, investment by SVG cultural industry practitioners in technology is very low, and few use the internet for e-commerce and marketing. There have been a few attempts made by associations and groups but these have not survived. There is a planned Joint e-Marketing Initiative for the Creative and Entertainment Industries. This will take the form of a web portal which will promote Vincentian arts locally, regionally and internationally and is being developed by the Business Skills Development and e-business incubators project and hosted by the CED. The importance of ICT to the cultural industries has further been recognised in the draft SVG National Export Strategy: 2009-2014, Export Sector: Music and Entertainment, Sector Consultation Document which has as a target to increase Internet and computer penetration to 70% of households by 2012.

9.0 Cultural Industries and Training

The individuals normally active in the cultural and creative industries can be broadly divided into three categories: - (1) Performers, (2) Creators of Media Content and Goods, and (3)

Management Representation and Technical Support. Examples of occupations in these three categories include:

Performers –

Dancers

Singers

Musicians

Songwriters

Actors

Radio/TV hosts

Poets

Creators of Media Content and Goods –

Music studio/record label operators

Film studios/producers

Directors

Graphic designers

Web designers

Script Writers

Song Writers

Editors

Recording engineers

Camera operators

Lighting technicians

Location managers

Fashion Designers

Craftsmen and Craftswomen

Sculptors

Painters

Management Representation and Technical Support –

Show promoters

Show producers

Stage managers

Set designers

Choreographers

Make-up artistes

Personal and Business Managers

Tour Managers

Sound Reinforcement Providers

Lighting Technicians

Venue Operators

Curators

Agents

Publicists

Entertainment attorneys

Arts and Arts Administration Educators

Publishers

Distributors

Manufacturers

Retailers

These three categories of participants form an integral part of the music, film, video, theatre, dance, book publishing, fashion, craft, and media segments of the cultural and creative industries. Their commercial and creative interaction results in the final delivery of products and services to the public, and is a process of collaboration and cooperation. The end result is the production of products and services incorporating an amalgam of rights and interests governed by contracts and principles of intellectual property law, particularly copyrights and trademarks.

By international standards, the entertainment industry alone is recognized as having in excess of one hundred distinct occupations and vocations directly related to the production, promotion and distribution of various types of entertainment products and services. The scope for employment creation in the cultural and creative industries is therefore significantly greater than recognized by most regional policy makers. The complexity and range of necessary activities and relationships dictate that the development and maintenance of a vibrant and globally competitive cultural and creative industry requires the provision of access to training for all related occupations and vocations. The breath of the industry also emphasizes the need for sector organizations, government, training providers, and entrepreneurs to work collaboratively and strategically with other local, regional and international partners to find training solutions. The diversity of the industry means that training solutions need to be flexible, varied and tailored to specific contexts.

Training in the arts and in arts and entertainment administration receives priority attention in the national development policy and education budgets of countries with well developed cultural and creative industries. Unfortunately the Caribbean experience has been one in which the majority of public and private sector leaders still see the arts and entertainment as extra-curricular activities. There is a very well known quotation taken from the response of an SVG politician in answer to a representation made for government support. The politician was quoted as asking the question; ***“Can you eat culture?”*** This is reflective of the attitude towards development in this sector.

Training in the arts in the SVG exists at a very minimal and unsatisfactory level. There are few official examinations in the arts below “A” Levels. The St. Vincent Community College offers an “A” Level programme in Art and Design, and to date 17 (45%) of graduates from this programme have moved on to further education on design degree courses overseas, whilst 8 are currently teaching the CXC Visual Arts syllabus in secondary schools, and 2 in primary schools. The focus of the Community College A level programme is on the area of painting and related media. This is the only programme of its kind in the OECS and there is need for its expansion to the associate degree level and to increase the coverage to include other disciplines such as graphic design, photography, fashion/textiles, performing arts and music.

All areas of the cultural and creative industries in St. Vincent and the Grenadines require highly trained practitioners in order to maintain global competitiveness. The major challenge is to provide training and access to a ready supply of highly skilled practitioners in an environment where individuals often only experience short periods of employment, have no funded training assistance, and work within fields with rapidly changing technology, and expensive equipment. Strategic initiatives to address this must encompass better funding and support mechanisms, as well as flexible training delivery formats ranging from formal primary, secondary and tertiary training institutions and online delivery of education, to on-the job and professional development workshops and seminars.

10. Marketing and Funding Cultural Industries

The policy direction relating to the marketing and funding of cultural and creative industries should be defined within the context of the St. Vincent and the Grenadines National Export Strategy, (NES). The NES is a unified strategic initiative that seeks to maximize the export sector’s direct contribution to economic and social development. The NES plans to coordinate

Vincentian export promotion and export financing programmes to advance the interests of Vincentian companies in the global marketplace.

The NES seeks to emphasize market development, including market access, export promotion, as well as the provision of market information, and intends to map out a pathway to overcome the many constraints to exporting including the following:

- Lack of information on potential foreign customers and agents, foreign markets and foreign demand for products, services and distribution channels;
- Depressed internal management capabilities, where managers do not have the clout to access foreign markets on their own; and
- Financing expenditure setbacks including insufficient capital, excessive cost of credit, and lack of understanding of international payment procedures.

The NES is part of the 2020 Vision of the National Economic and Social Development Plan for SVG currently being developed by the Central Planning Division and the Ministry of Foreign Affairs, Trade and Commerce whose core responsibility is the promotion and development of trade activities. The NES process is coordinated by the Export Development division of Invest SVG (formerly referred to as National Investment Promotions Inc.) with technical assistance from the Commonwealth Secretariat and the International Trade Centre.

In assessing the market for SVG cultural and creative goods and services, the experiences of the industry practitioners, Invest SVG and the recently formed SVG Coalition of Service Industries (CSI) are taken into consideration.

The CSI acts as an umbrella non-governmental business support organization formed to encourage the growth and development of the services sector in SVG. Particular emphasis is placed by the CSI on empowering current, potential and aspiring service exporters to identify and exploit market opportunities. It also serves as an advocacy and lobby group to government and international agencies on behalf of services providers, and assists in capacity development, the development of standards and certification to facilitate access to foreign markets. The CSI membership includes, but is not limited to associations in the fields of creative and cultural industries.

10.1 Market Assessment

The SVG National Export Strategy and the mandates of Invest SVG and the Coalition of Services Industries coincide in the recognition of the important role of the cultural and creative industries, and place special emphasis on market assessment, and the identification of strategic market opportunities as well as new potential markets.

The products and services of the music, fashion and craft sub-sectors are identified as providing the greatest competitive advantage for St. Vincent and the Grenadines. A collaborative marketing thrust focusing on diversification and further development of the products and services offered, target markets, positioning, promotional efforts and distribution is necessary. This should be pursued collectively, utilizing the resources and expertise of Invest SVG, the Coalition of Services Industries and the Centre for Enterprise Development.

Priority treatment and special emphasis is required for primary export markets such as the Caribbean, North America and the UK, and strategies needed for the development and penetration of new markets such as Brazil, and Asia. Continued participation in trade events

such as the Caribbean Gift and Craft Show, and joint missions to international music and new media trade fairs such as MIDEM and WOMEX are necessary. The possibility of collaborating with other regional entities in the staging of, and/or participation in Caribbean music, entertainment and media expositions provide excellent opportunities for the promotion of SVG cultural and creative products and services. The once revered Vincy Mas and SVG's under-exposed Garifuna music traditions also provide very fertile bases for marketing of special niche products.

The cultural and creative industries market generates income from the sale of goods (example – craft items, fashion items, CDs, DVDs, books, paintings) as well as the provision of services (example - production fees, performance fees) and the licensing of intellectual property which generates royalties. The global market demand for cultural content has risen steadily in recent years, and the cultural industries sector continues to be one of the fastest growing sectors of the world economy. According to a UNCTAD report, between the years 2000 and 2005 the global market for cultural goods and services grew at an average of 8.7 per cent annually. In 2005 the world market for cultural goods and services was estimated by UNCTAD at US\$424.4 billion (3.4 per cent of total world trade), up from US\$227.4 billion in 1996.

In contrast the Price Waterhouse Coopers Entertainment and Media Outlook, which provides analyses and market forecasts for activities such as television, filmed entertainment, recorded music, video games, radio, books, newspaper and magazine publishing and advertising, as well as theme and amusement parks, estimated the global market to be worth US\$1.2 trillion in 2003, and projected it will rise to US\$2.2 trillion in 2012. The Price Waterhouse Coopers 2008 report also revealed that digital and mobile distribution as a share of the global creative economy will rise from 5 per cent in 2007 to 11 per cent in 2012. Data for 2007 also shows that the recorded music industry is the forerunner with digital revenues accounting for 15 per cent of the industry.

There is almost no data in existence regarding the size of the Caribbean cultural and creative industries markets. Most developing market economies however show between 2 and 5 per cent share of GDP for cultural and creative industries. They also show consistent and stable growth in recent years measured in terms of rising shares of employment and exports. Jamaica is the only Caribbean country for which data is available, and these show a 5.1 per cent share of GDP and a 3 per cent share of employment.

Based on global market trends emphasis will need to be placed within St. Vincent and the Grenadines on the development of online and digital mechanisms for production and marketing of cultural products and services. There is need for the development of Internet readiness for alternative broadcasting, marketing and distribution of cultural goods, services and events. A SVG cultural and creative industries web portal should be a major part of the national marketing policy and strategy, and should include digital archiving and information dissemination facilities for the benefit of sector practitioners, policy makers and investors.

10.2 Funding Assessment

As is the case with most developing countries, cultural entrepreneurs in St. Vincent and the Grenadines face tremendous challenges in obtaining loan financing, development funding, and venture capital from the traditional banking and investment sectors. Development of globally competitive enterprises is hampered due to the prohibitive costs in terms of economic outlay to cultural entrepreneurs as they seek to establish a presence in foreign markets. Infrastructure for cultural industries development, such as venues and training and educational facilities is grossly underdeveloped and almost non-existent. To combat these developmental challenges innovative funding and fiscal incentives are required to facilitate investment and access to funding. Presently fiscal incentives to support cultural industries are inadequate, random, or inaccessible due to unclear guidelines.

A comprehensive funding policy incorporating a range of measures such as legislation, regulations, programme support and tax incentives is required for industry development. The SVG approach should be determined bearing in mind the experiences of countries such as Brazil, Ireland, Sweden, the United Kingdom and Singapore.

In a recent study of international best practices in the funding of cultural industries done by Lisa Calendar for the CARICOM Task Force on Cultural Industries, the cases of Brazil, Ireland, Sweden, Singapore and the United Kingdom were examined¹⁸.

In Brazil for example, the introduction of fiscal incentives to complement a National Plan for Culture (PRONAC) outlining priorities for support to the arts and cultural heritage while targeting the audiovisual sector enabled the leveraging of additional investment in the cultural sector. The application of incentive laws to the creation of cultural centres through partnerships between the government, private sector and stakeholders in the community provided an effective vehicle for dissemination of the policies as well as the implementation of the National Plan for culture.

In Ireland, decentralization of the policy implementation framework, introduction of special legislation, financial and social support to artists and the design of a unique tax regime have ensured preservation of the cultural heritage and created a magnet for investment.

The Swedish welfare model provides a comprehensive and holistic system of support to the arts including general allocations to institutions, subsidies to cultural industries, direct grants to artists, special programmes to enhance employment of artists and public art programmes; largely financed through public funds and administered by more than 40 agencies. There are prominent roles in the Swedish model for associations of practitioners and the creation of public-private partnerships.

¹⁸ *International Best Practice in Government Policy-Incentives for Cultural Industries Development*, Draft Report for the CARICOM Task Force on Cultural Industries, by Lisa Calendar. 2009

In the United Kingdom, the deployment of a range of fiscal incentives, administered through a network of Non- Departmental Public Bodies (NDPB) to support the development of ‘the arts’ has provided the backdrop to vibrant institutions; while a number of studies have focused policy makers on the economic potential of the ‘creative industries’.

For Singapore, the policy support to creative industries in the form of a transparent system of multi-level incentive schemes is expected to yield economic benefits, as well as human, social and environmental benefits; which will position the country as the preferred place of abode for creative professionals. This is projected to add new textural dimensions to the cultural life of the country and catalyze the advancement of the knowledge economy.

Of interest to Caribbean policy makers, are the varying approaches to the development of the cultural industries and the application of incentives. Some countries focus on cultural industries development as a tool for the nurturing of human, social and societal development (Brazil, Ireland, and Sweden). Other countries (UK, Singapore) are more focused on mining economic potential.

A funding policy for development of the SVG cultural and creative industries should include the following:

1. Public-private partnerships to leverage investments in the creative industries based on the combination of legislative reform and a menu of fiscal incentives. The Small Business Development Act 2007 and the Information and Communication Technology Sector Investment Incentives Act 2007 are very good examples and should be complimented by the enactment of a Cultural and Creative Industries Encouragement Act to provide incentives to recognized cultural producers. Potential public-private investments could include those related to the development of human capital, regeneration of heritage infrastructure and development of community based cultural centres.
2. Active participation in negotiating and accessing development funding from international trade agreements such as the EPA and others.
3. Implementation of a system of specific sub-sector incentives targeted to the development of trade and investment.

4. Introduction of human, social and financial direct support to professional artists and cultural practitioners, consistent with the ideals of international best practices.
5. Improve access to finance, credit and business support services for emerging and export-ready firms and individuals. Establish business management agencies and trade/export facilitation centres. These measures should be matched by market development grants and financing for participation in trade fairs.

10.3 Incentive Programmes

The Small Business Development Act 2007 offers significant potential to assist with the general development of cultural industry participants. It offers a number of incentives to micro enterprises defined as one:

- a) in which not more than five persons are employed;*
- b) whose gross revenue does not exceed one hundred thousand dollars per year;*
- c) whose net assets do not exceed seventy-five thousand dollars per year; and*
- d) which, if it is a company, has more than 75 per cent of its shares owned locally;¹⁹*

and to small businesses defined as those in which:

- a) not more than fifty persons are employed;*
- b) whose gross revenue does not exceed one million dollars per year;*
- c) whose net assets do not exceed half a million dollars per year; and*
- d) which, if it is a company, has more than 75 per cent of its shares owned locally²⁰*

¹⁹ S 2 Small Business Development Act 2007

where local ownership of shares includes ownership by the member States of the Caribbean Community excluding an Associate Member. The provisions of the Act apply to businesses involved in arts and cultural activities and entertainment services and which *“provide socio-economic benefit including the generation of new investment or the development of products or processes, improvement in employment or production capacity through market research, technical invention or innovation, or the enhancement of export potential, foreign exchange earnings or savings, or the general welfare of persons in Saint Vincent and the Grenadines”*²¹.

The Act offers a number of concessions including on income tax at a rate of 20 per cent on profits and deductions on expenditure on technology, market research and activities directly related to business development, exemption from Stamp Duty and importantly, deductions on the fees payable for the registration of trademarks and patents²². Further, the Act allows for Cabinet to approve any government department, agency or private sector organisation as a provider of technical assistance including product design, packaging and label design, quality control, participation in overseas trade shows, the preparation of business plans, marketing assistance and the financing of feasibility studies²³.

It is imperative that cultural industry participants are educated about the provisions of the Act and are encouraged to register under the Act in order to take advantage of the benefits offered.

²⁰ Ibid

²¹ S 11(2) Small Business Development Act 2007

²² S 10(1) Ibid

²³ S 11(1) and 11(2) Ibid

PART 3 – DEVELOPMENT STRATEGY

11.0 Recommendations and Development Strategy

Like so many other Caribbean states, St. Vincent and the Grenadines is well placed to capitalize on the global popularity and interest in the indigenous cultural goods and related services from the region. The advent of new production, promotion and distribution technologies and their positive impact on growth in global market share of digital cultural goods and services, does also

auger well for the development of new cultural and creative ventures in St. Vincent and the Grenadines that are globally competitive.

The clearly demonstrated interest of the youth population in vocations connected to entertainment and the use of new ICTs (mobile phones, computers, the Internet and PDAs) also provides fertile ground and opportunities for empowerment and gainful employment. Recent research, development and funding initiatives undertaken throughout the Caribbean and by international agencies such as the European Union, UNCTAD, UNESCO, Organization of American States, and US AID also clearly point to the cultural and creative industries of Caribbean states as a priority area for development attention and support.

The development strategy for SVG cultural and creative industry should be hinged upon a major public education and awareness building programme. This is critical to the roll out and implementation of the development policy. The buy-in and clear public endorsement of the cultural and creative sector as an important economic driver by political and business leaders is also required in order to reduce the level of ambivalence that presently exists among cultural producers and potential investors in cultural activities.

The significance of accomplishing more speedy adjustments by the general population, and the cultural practitioners in particular, to the use of communication technologies such as emails and the Internet cannot be overstated. While SVG enjoys a relatively high level of Internet penetration, broadband speed remains unacceptably low, and the average individual has not made the adjustment to the use of emails as a priority means of communication.

A cultural and creative industry policy framework, when combined with the design and implementation of an appropriate development strategy provides the mechanism necessary to create an enabling environment for economic growth within the sector. In order to reap maximum benefits from a more structured commercial and industrial approach to the creative

and cultural industry in SVG, it is however critical that restructuring efforts also include emphasis on appropriately designed activities to encourage and foster local creativity and increase the appreciation of the value of originality.

The following are the main strategies recommended:

- Coordination of a public education and awareness building campaign launched and executed with the cooperation of various agencies of government (CIPO, Invest SVG, Ministry of Education, Ministry of Culture, SVG Tourism Authority, and CED). This should include a creativity workshop for policy makers and administrators.
- Rationalization and coordination of the inputs of relevant government Ministries and agencies through the formation of an inter-Ministerial committee for cultural industries development spearheaded by the Ministry of Culture.
- Development and expansion of relevant training facilities and activities within the formal education system, as well as within the cultural and creative industries environment in the form of short term programmes. Expansion of the Art and Design programme of SVG Community College and the inclusion of core components of creativity education in teacher training programmes. Implementation of collaborative and cooperation programmes for training and capacity building with institutions in countries such as Cuba, Jamaica and Barbados.
- Provision of more easily accessible information regarding the role and available resources of regional development agencies and initiatives such as the OECS Export Development Unit, Caribbean Export Development Agency, the Office of Trade Negotiations/OTN (formerly the Caribbean Regional Negotiating Machinery/CRNM), and the CARICOM Regional Task Force on Cultural Industries, as well as international agencies including the EU, USAID, OAS, Commonwealth Foundation, and the Canadian International Development Agency.

- Provision of marketing and business support services through partnerships between state agencies and industry practitioners. This should include design and implementation of a SVG cultural and creative industries web portal to incorporate the initiatives being planned by the CED (VINCY TIME) to include facilities for information dissemination, research, e-commerce, and audio-visual streaming. The SVG CREATE project should be revived, restructured and incorporated as a part of this portal. Marketing initiatives should also include the Coalition of Services Industries and increased participation in relevant international trade shows.
- Investment in product development facilities to increase the value and volume of output of local cultural products and services. This should include the expansion of the CED business incubator system to incorporate and include incubators specific to creative and management practitioners in the cultural industries, the development and implementation of co-branding activities between the SVG Tourism Authority and private and public sector organizations from the creative sector, and the creation of more performance spaces.
- Capacity building of industry organizations and public sector cultural development agencies, including the sourcing of development funding and management training for administrators. This would include support for institutions such as the SVG Cultural Development Foundation, ECCO, SVG Create, Carnival Development Corporation, Youlou Pan Movement, and the Commerce and Intellectual Property Office.
- Creation of facilities (including legislative support) to reduce barriers to business start-up and increased growth in private enterprise. These should include tax incentives, provision of venture capital, increased development funding, and reduction of the costs to register local businesses in SVG.

The SVG cultural and creative industry development strategy defines the timeframe and phasing of the key activities for the implementation of the main recommendations made. The suggested approach is the implementation of these activities over a five year period in three phases: 1. Short term (12 months), 2. Medium term (30 months), and 3. Long term (60 months).

LOGICAL FRAMEWORK - SVG Cultural Industry Development Strategy

<p>Wider Objective:</p> <p>To create a sustainable enabling business environment, which provides the opportunity for the private sector to increase investment and create capacity for economic competitiveness in SVG cultural enterprises</p>	<p>Indicators of Progress</p> <ol style="list-style-type: none"> 1. The number of businesses operating successfully in SVG in the cultural and creative industry 2. Implementation of international business best practices by operators 	<p>How Indicators Will Be measured</p> <ol style="list-style-type: none"> 1. List of CIPO registrations, and verification and monitoring of CI directory by Invest SVG 	
<p>Specific Project Objective(s):</p> <ol style="list-style-type: none"> 1. Establishment and strengthening of private sector associations to provide domestic and international business support for practitioners 2. Increase awareness of IP rights and enforcement and administration procedures among rights holders, users and members of the state law enforcement machinery 3. Provision of capacity building and training facilities at all levels of formal educational system, as well as through professional development workshops and seminars 4. Implementation of tax related and other 	<p>Indicators of Progress</p> <ol style="list-style-type: none"> 1. The existence of relevant industry groups and associations and an umbrella cultural industries private sector body 2. Greater levels of understanding, compliance with and enforcement of copyrights and related rights 3. The existence of a coordinated government plan of action involving all relevant agencies 4. Enactment of relevant incentives legislation and regulations to encourage 	<p>How Indicators Will Be measured</p> <ol style="list-style-type: none"> 1. Incorporation documentation, association guidelines and statutory declarations 2. Reports on anti-piracy and other copyright infringement cases. Licenses issued to users by collective management societies 3. Records and reports from agencies such as CED and Invest SVG 4. Statutes, regulations, CIPO registry and Invest SVG records 5. School curriculum and 	<p>Assumptions & Risks</p> <ol style="list-style-type: none"> 1. It is assumed that industry practitioners possess the requisite knowledge of internationally accepted business practices specific to cultural industries. 2. It is assumed that government policy makers and administrators will treat cultural and creative activities as activities of great economic value 3. There is the risk of not securing buy in and support from frustrated industry practitioners 4. Private financing of projects may take

<p>incentives to encourage new investments and funding of cultural enterprises</p> <p>5. Establishment of Inter-Ministerial Committee to oversee and coordinate public sector inputs and support</p>	<p>new investment</p> <p>5. New creative arts training programmes in schools and the availability of short professional development workshops</p>	<p>examinations</p>	<p>some time to become meaningful</p>
<p>Outputs (Tangible) and Outcomes (Intangible)</p> <p>1. Establishment of umbrella organization to represent subsectors of the cultural industry</p> <p>2. Establishment of the SVG Cultural Industries Network</p> <p>3. Establishment of an SVG web portal to support development of the cultural industry</p> <p>4. Educational programmes at secondary and tertiary levels that focus on the creative, technical and administrative aspects of the Arts</p> <p>5. Professional development workshops for local practitioners facilitated by regional and international experts</p> <p>6. Implementation of a public education programme on IP rights administration and enforcement, by Ministry of Culture and CIPO</p> <p>7. Legislative framework for encouragement of</p>	<p>Indicators of Progress</p> <p>1. Registration of new umbrella organization or restructuring of SVG Create to take on expanded roles</p> <p>2. Formation of management committee of SVG CIN and preparation of membership structure</p> <p>3. A modified and expanded Vincy Time website to include content for cultural and creative industry web portal</p> <p>4. New high school and community college courses and examinations covering a wider range of arts disciplines.</p> <p>5. Advertising and PR campaign in all media with information about IP and the value of creativity and innovation</p> <p>6. Inclusion of clear mandates and defined activities for cultural industry development within CED, Invest SVG and</p>	<p>How Indicators Will Be measured</p> <p>1. Incorporation documents and association guidelines</p> <p>2. Network organization guidelines and meeting reports</p> <p>3. Published web portal</p> <p>4. School curriculum and examinations</p> <p>5. Media content and public debate</p> <p>6. Agency reports and website information</p> <p>7. Events programmes and reports</p> <p>8. Membership agreements and agency reports</p>	<p>Assumptions & Risks</p> <p>1. Principals of SVG Create will cooperate with industry leaders in the establishment of an umbrella organization</p> <p>2. CED will buy into concept of expansion of the scope of Vincy Time project</p> <p>3. Ministry of Education will have requisite skilled personnel to implement new training courses and examinations</p> <p>4. Practitioners will take advantage of professional development workshops</p> <p>5. Legislative machinery will move in a timely manner to enact new laws and regulations</p>

<p>investment in SVG Cultural Industries</p> <p>8. Greater levels of appreciation of the economic value of culture among policy makers, private investors and financiers.</p> <p>9. Enhanced levels of professionalism among industry practitioners</p> <p>10. Increased levels of employment and earnings by creators, performers and relevant support personnel</p>	<p>other relevant government agencies</p> <p>7. Collaborative capacity building, networking, and marketing initiatives organized by industry practitioners in association with Invest SVG, CED and Ministry of Culture</p> <p>8. Increased membership in rights management societies and trade associations</p>		
<p>Key Activities</p> <p>1. Establish national task force or assign responsibility to existing agency</p> <p>2. Organize creativity workshop for government policy makers and administrators</p> <p>3. Workshop/seminar presentations on funding opportunities, creativity, and global marketing</p> <p>4. Participation in relevant international and regional conferences and meetings</p> <p>5. Establish an umbrella creative industry organisation or revive and empower SVG Create to take in that role</p> <p>6. Expand the scope of Vincy Time website to</p>	<p>Inputs</p> <p>1. Time from Government and industry representatives</p> <p>2. Time from Lecturer Vonnie Roudette and Government policy makers and administrators</p> <p>3. Time from industry practitioners, Government agency reps and consultant</p> <p>4. Time from industry practitioners and Invest SVG/CED representatives</p> <p>5. Time from members of SVG Create and heads of industry associations.</p> <p>6. Time from CED representative, EU ICT</p>		<p>Assumptions, Risks & Preconditions</p> <p>1. Government officials will move in a timely manner to review framework and development strategy and establish task force</p> <p>2. Policy makers and administrators will accept need for their familiarization with creativity and economic aspects of cultural activities</p> <p>3. Costs involved in participation in overseas conferences and meetings will not be seen as prohibitive</p>

<p>become a web portal and major marketing tool for SVG creative industry</p> <p>7. Restructure training programmes in secondary and tertiary institutions</p> <p>8. Enactment of local legislation and signing of relevant international treaties</p>	<p>Consultant and industry leaders</p> <p>7. Time from Ministry of Education representatives, lecturers and industry leaders</p> <p>8. Time from Government representatives and IP/Trade professional</p>		
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Activity Implementation Schedules

Table 1 – Short Term Activities

Strategies	Activities	Private Sector/Industry Inputs	Government Inputs	Regional/International Agency Inputs
Rationalization and coordination of roles of government agencies	Establishment of Inter-Ministerial committee headed by Minister of Culture Establish national task force or assign		Ministry of Culture to take lead role Ministries of Education, Tourism, Finance and	Provide information on best practices in other countries and technical assistance

	<p>responsibility to existing agency</p> <p>Collective review and revision of policy and preparation of budgets</p> <p>Coordinate and develop inter-agency policies and inter-sectoral linkages</p>		<p>Planning, Telecommunications, Science, Technology and Industry, CED and Invest SVG to spearhead policy coordination and collaborations</p>	
<p>Provision of information on regional and international development funding opportunities</p>	<p>Workshop/seminar presentations on funding opportunities</p> <p>Participation in relevant international and regional conferences and meetings</p>	<p>Attendance, research and provision of information</p>	<p>Government to provide resources & technical expertise</p>	<p>Financial support, technical assistance and training</p>
<p>Coordinate and facilitate private sector institutional strengthening</p>	<p>Establish an umbrella creative industry organisation or revive and empower SVG Create</p> <p>Strengthen and create professional associations, (ECCO SVG, Calypsonians Association, Youlou Pan Movement, CSI)</p>	<p>Industry members to participate in development, of organization</p> <p>Organizations to present strategic plan for development</p>	<p>Government to provide support and ensure establishment</p> <p>Assist in seeking external funding</p>	<p>Financial support for start-up expenses</p> <p>Technical Assistance, Financial support & training opportunities</p>

Table 2 – Medium Term Activities

Strategies	Activities	Private Sector/Industry Inputs	Government Inputs	Regional/International Inputs
Coordinate public education programme for stakeholders and consumers	Public education campaigns on intellectual property, rights management and anti-piracy	Industry principals to play integral role	CIPO and Ministry of Culture to take the lead in collaboration with industry & the media	Financial support
	Organize creativity workshop for government policy makers and administrators	Industry experts to play integral role and provide information	Provide resources for workshop and ensure participation of relevant officers	Financial support
Facilitate marketing and business support	Expand the scope of Vincy Time website to become a marketing tool for SVG creative industry	Industry stakeholders to play integral role	CED and Invest SVG to take the lead	Financial support and technical assistance
	Expand presence at international fashion, music and craft shows	Organize and collaborate for high quality and diverse representation	Financial support	Financial support
	Organize joint local and international sales presentations with SVG Tourism Authority	Industry stakeholders to play integral role	Financial support with CED, Invest SVG	

	Organize local workshops and showcases on packaging and presentation of products and services	Industry stakeholders to play integral role	and Tourism Authority collaborating and working jointly Financial support	Financial support Financial support and training
Coordinate and facilitate public sector institutional strengthening	Strengthen and empower National Cultural Foundation/NCF and establish secretariat Restructure the Carnival Development Corporation and rationalize its role with responsibilities of the NCF		Ministry of Culture to take the lead, and government to provide financial support Ministry of Culture to take the lead, and government to provide financial support	Provide technical assistance and financial support Provide technical assistance and financial support
Coordinate and facilitate private sector institutional strengthening	Organize training for administrators of industry organizations Establish working partnerships between local organizations and overseas	Industry organizations to be integrally involved Industry organizations to be integrally involved	Government to support Government to support	Financial support and training

	counterparts			Financial support
Enhance legal and regulatory framework	<p>Provide specialized IP enforcement training to police, judiciary and customs</p> <p>Become signatory to relevant international IP agreements</p> <p>Introduce legislation to facilitate e-commerce and regulation of the digital environment</p>	Industry to be consulted	<p>Government to finance and support</p> <p>Government to play active role</p> <p>Government to play active role</p>	Financial support and training

Table 3 – Long Term Activities

Strategies	Activities	Private Sector/Industry Inputs	Government Inputs	Regional/International Inputs
<p>Develop and expand relevant training facilities</p>	<p>Coordinate, review & upgrade training institutions & programmes at all levels</p> <p>Introduce short-term professional development series</p> <p>Strengthen & expand programmes at SVG Community College</p>	<p>Industry to be consulted and to give support</p> <p>Industry to be consulted</p> <p>Industry to articulate its needs</p>	<p>Ministry of Education to develop a plan and lead, in collaboration with secondary & tertiary institutions</p> <p>Government to support</p> <p>Ministry of Education to develop a plan and lead, in collaboration Community College</p>	<p>World Bank, UNESCO, UNDP, USAID, WIPO, donor countries, private foundations, Caribbean Development Bank to give support, facilitate and manage funds where appropriate</p>

<p>Invest in product development facilities</p>	<p>Upgrade & develop new venues</p> <p>Increase access to computers & the internet, especially broadband technology</p> <p>Identify and develop new talent</p> <p>Conduct ongoing market research</p>	<p>Industry to be consulted. Leisure and resort operators to play integral role</p> <p>Industry to articulate its needs</p> <p>Industry to play integral role</p> <p>Industry to play integral role</p>	<p>Government to have integral role</p> <p>CED business incubator project to incorporate technology centres for creative arts</p> <p>NCF and CDC to develop a strategy and play integral role</p> <p>Invest SVG, Ministry of Culture to collaborate with private research firms</p>	<p>Technical assistance and funding</p> <p>Technical assistance and funding</p> <p>Provide training & other opportunities</p>
<p>Facilitate access to finance</p>	<p>Awareness building and sensitization of the financial sector</p> <p>Enact Entertainment/Cultural Industries Development Act</p>	<p>Industry to articulate their needs</p> <p>Industry to be consulted</p>	<p>Invest SVG, CED, Ministry of Finance and Planning to support and participate</p> <p>Government to lead and make priority</p>	<p>Technical assistance and funding</p> <p>Provide information on best practices in other countries</p>

	<p>Establish venture capital, grant and loan financing</p> <p>Negotiate sponsorship deals</p>	<p>Industry organization to collaborate with financial partners</p> <p>Industry to initiate proposals</p>	<p>Assist in seeking international sources</p> <p>Invest SVG, Tourism Authority to assist</p>	<p>Financing and technical assistance from international agencies and donors</p>
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ANNEX 1

List of Stakeholders Consulted

Felix Lewis	Centre for Enterprise Development
Julian Pollard	Handicraft Officer
Andrea Young Lewis	Commerce and Intellectual Property Office
Nzimbo Brown	
Martin Quashie	Drama Development Officer
Elford Kennedy	Calypsonian Association
Bernard Joseph	Eastern Caribbean Copyright Organization (SVG)
Shernelle Williams	Recording Artist
Raeon Primus	Recording Artist
Jomoro Francis	Pan Musician
Joffe Venner	Music Officer
Oswald Williams	Music Officer
Junior Sutherland	Music Teacher/Video Producer
Marla Nanton	Ministry of Education
Richard Macleish	Media Manager SVG Broadcasting
Orvil Samuel	Videographer
Mark Cyrus	Music Producer
Dexter Bacchus	Ministry of Education/Teacher
Vonnie Roudette	SVG Community College/Senior Lecturer in Art and Design
Glenroy Caesar	Ministry of Culture
Anthony Theobalds	Director of Culture

Rene Baptiste	Minister of Culture
Albert Harry	Youlou Pan Movement
Andrew Simmons	KDS Consulting
Joylyn Lampkin	Coalition of Services Industries
Stephen Lyn	Art Teacher
Adrian Bailey	Music Producer
Edgar Adams	Adams Book Centre
Bartholomew Quammie	Tubbs Arts & Craft
Jani Savolainen	EU Consultant/IT Specialist
Cleo Huggins	Invest SVG
Curtis Dennie	Invest SVG
Lyndon George	Attorney at Law
Gary "Troots" Young	Recording Artist
Roland "Scrapie" Dopwell	Craft/Jewellery Producer
Ashford Wood	Carnival Development Corporation
Andre Liverpool	Reggae Promoter
Lennox Lampkin	SVG Computer Society
Kimya Glasglow	Fashion Designer
Edwin Johnson	Garifauna, traditional knowledge

ANNEX 2

List of Documents Reviewed

1. SVG National Export Strategy 2009 – 2014
2. Draft Cultural Policy of the Government of St. Vincent and the Grenadines (2005)
3. SVG National Cultural Directory
4. SVG Cultural Programme 2010
5. Youlou Pan Movement Draft Development Plan
6. SVG Private Sector Policy Development Framework 2009
7. Music Industry National Strategy and Action Plan, Jamaica 2004
8. International Best Practice in Government Policy – Cultural Industries Development, CARICOM Task Force 2009
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ANNEX 3

List of Legislation

International

- Berne Convention for the Protection of Performers, Producers of Phonograms and Broadcast Organisations 1886
- CARIFORUM-EU Economic Partnership Agreement 2007
- Convention on the Protection and Promotion of the Diversity of Cultural Expressions, 2005
- Convention for the Safeguarding of the Intangible Cultural Heritage 2003
- Hague Agreement for the International Registration of Industrial Designs 1999
- Protocol Relating to the Madrid Agreement Concerning the International Registration of Marks 1989
- Revised Trademark Law Treaty (2006) ('the Singapore Treaty')
- Rome Convention for the Protection of Performers, Producers of Phonograms and Broadcast Organisations 1961
- Trade Related Aspects of Intellectual Property Rights (TRIPs) 1994
- World Heritage Convention
- WTO General Agreement on Trade in Services 1994
- WTO General Agreement on Tariffs and Trade 1994
- WIPO Copyright Treaty (WCT) 1996
- WIPO Performances and Phonograms Treaty (WPPT) 1996

Local

- Carnival Development Corporation Act 2002
- Copyright Act 2003
- Information and Communication Technology Sector Investment Incentives Act 2007
- Industrial Designs Act 2005
- Preservation of Historic Buildings and Antiquities Act 1976
- Small Business Development Act 2007
- St. Vincent and the Grenadines National Trust Act 1969
- St. Vincent and the Grenadines Electronic Transactions Act 2007

ANNEX 4

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