



# CREATIVE INDUSTRIES

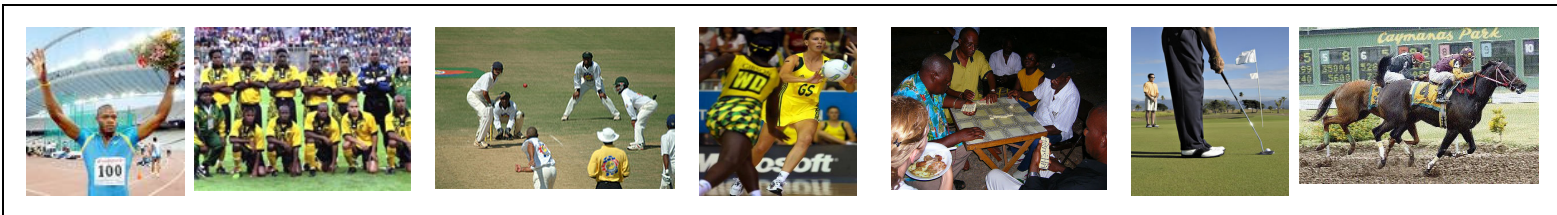


**A  
N  
D**



# SPORT

## SECTOR PLAN (1<sup>ST</sup> DRAFT)



# Table of Contents

	<b>Page</b>
<b>1. INTRODUCTION.....</b>	<b>1</b>
2.1 OVERVIEW - CREATIVE INDUSTRIES .....	3
2.2 OVERVIEW - SPORT.....	7
2.3 ISSUES AND CHALLENGES – CREATIVE INDUSTRIES AND SPORT.....	9
<b>3. SWOT ANALYSIS .....</b>	<b>13</b>
<b>4. VISION STATEMENT FOR CREATIVE INDUSTRIES AND SPORT .....</b>	<b>18</b>
4.1 VISION STATEMENT – CREATIVE INDUSTRIES .....	18
4.2 VISION STATEMENT – SPORT .....	19
4.3 STRATEGIC VISION.....	19
<b>5. STRATEGIC FRAMEWORK FOR CREATIVE INDUSTRIES AND SPORT - GOALS, OBJECTIVES AND STRATEGIES .....</b>	<b>20</b>
<b>6. THE WAY FORWARD .....</b>	<b>28</b>
<b>7. APPENDICES .....</b>	<b>29</b>

# Vision 2030 Jamaica: National Development Plan

## *Creative Industries and Sport Sector Plan*

### 1. Introduction

IN 2006, THE GOVERNMENT of Jamaica (GOJ) mandated the Planning Institute of Jamaica (PIOJ) to lead the preparation of a comprehensive long-term National Development Plan (NDP) which will seek to place Jamaica in a position to achieve developed country status by 2030. Development of the Plan began in January 2007 and twenty-seven Task Forces (TFs) including the Creative Industries and Sport Task Force were established thereafter. The TFs represent sectors and areas critical to the achievement of the national goals and have been charged with responsibility for developing the relevant long-term sector plans.

The Creative Industries and Sport Task Force commenced the plan preparation exercise in April 2007, leading to the completion and submission of a 1<sup>st</sup> draft report for the long-term development of Creative Industries and Sport in Jamaica.

This Sector Plan for Creative Industries and Sport is one of the strategic priority areas of the *Vision 2030 Jamaica: National Development Plan*. It is one of a number of chapters that will form the foundation for the development of Jamaica 2030 – a 20-year plan based on a fundamental vision to make ‘*Jamaica the place of choice to raise families, live, work and do business,*’ and on guiding principles which put the Jamaican people at the centre of the nation’s transformation. Twelve strategic

priorities, which include International Competitiveness and Gender, Culture and Values, have been identified as critical elements in fulfilling the objectives of the plan.

The preparation of the Plan will be supported by a quantitative systems dynamics computer model – Threshold 21 (T21) – which supports comprehensive, integrated planning that would enable the consideration of a broad range of interconnected economic, social and environmental factors and will be used to project future consequences of different strategies across a wide range of indicators. In addition, it will enable planners to trace causes of changes in any variable or indicator back to the relevant assumptions and policy choices.

The first draft of this sector plan was developed using the following processes:

- Participation of Task Force Members<sup>1</sup> through Task Force Meetings<sup>2</sup> that were used to solicit ideas and views on Creative Industries and Sport issues and challenges facing Jamaica as well as identifying a vision for Creative Industries and Sport in Jamaica, and

<sup>1</sup> See Appendix 1 for List of Members of the Creative Industries and Sport Task Force

<sup>2</sup> See Appendix 2 for Listing of Task Force Meetings

- determining key goals, objectives and strategies for the sector
- Research on international best practices in Creative Industries and Sport that could be adopted in the Jamaican context
  - Review of relevant documentation on the Creative Industries and Sport sector.

This 1<sup>st</sup> Draft Sector Plan for Creative Industries and Sport is structured in the following sections as follows:

- Situational Analysis
- SWOT Analysis
- Proposed Vision Statement
- Strategic Framework – Goals, Objectives and Strategies

# Vision 2030 Jamaica: National Development Plan

## *Creative Industries and Sport Sector Plan*

## 2. Situational Analysis – Jamaica’s Creative Industries and Sport

### 2.1 Overview - Creative Industries

JAMAICA IS DISTINGUISHED by the worldwide reach of its culture, particularly music. The National Culture Policy of 2003 sees Jamaica as a potential “cultural superstate”, with culture playing an important role in national development through promotion of positive national self-identity, development of cultural industries and institutions, and cultural linkages to entertainment, education, science and technology, intellectual property rights, media, industrial development, tourism, environment and heritage .

#### Global Growth of Creative Industries

Cultural industries involve the creation, production and commercialisation of contents which are intangible and cultural in nature, which are typically protected by copyright, and which may take the form of goods or services. The range of cultural industries (sometimes also known as "creative industries") include printing, publishing and multimedia, audio-visual, phonographic and cinematographic productions, crafts and design, and also may be extended to include architecture, visual and performing arts, sports, manufacturing of musical instruments, advertising and cultural tourism.<sup>3</sup> Their economic potential may be illustrated by their growth in the world’s largest economy, where core copyright industries in the USA grew three times as fast as the annual rate of the economy between 1977 and the year 1996, when cultural products (including films, music, television programs, books, journals and computer software) became the largest US export for the first time, surpassing other traditional industries, including automobiles, agriculture, aerospace and defence.<sup>4</sup> Cultural and creative industries represent one of the fastest growing sectors of the global economy, representing up to 7% of the world’s GDP with growth forecast at 10% per annum, driven in part by the convergence of media and the digital economy.<sup>5</sup> Studies also indicate the contribution that creative industries make to the economies of the regions in which they are located, through income generation and purchases of supplies, and by enhancing the design, production and marketing of products and services in other sectors.<sup>6</sup> Jamaica possesses the potential to develop its cultural and creative industries into a major economic sector

<sup>3</sup> This extended definition based on UNESCO is appropriate for Jamaica.

<sup>4</sup> Based on a 1996 report by the International Intellectual Property Alliance (IIPA) quoted on <http://portal.unesco.org/culture>

<sup>5</sup> Nurse, Keith et al. (2006). *The Cultural Industries in CARICOM: Trade and Development Challenges (Draft)*.

<sup>6</sup> Markusen and King (2003).

based on its demonstrated competitive advantages and the projected long-term growth of the global creative economy.

By far the most successful cultural industry in Jamaica has been its popular music, whose leading exponent Bob Marley has become the single most famous Jamaican at a global level, while the presence of Jamaican music is reflected on international music awards events, music festivals and sales charts. However the ownership and commercial management of cultural industries including Jamaican music have been vested in developed countries which control the global means of production and distribution of these industries. As a consequence it has been estimated that while Jamaican music accounts for an estimated 3% of world music sales, amounting to US\$1 billion in 2003, the country itself received only 25% of this sum or some US\$250 million.<sup>7</sup> As stated by UNESCO:

“The world map of cultural industries reveals a yawning gap between North and South. This can only be counteracted by strengthening local capacities and facilitating access to global markets at national level by way of new partnerships, know-how, control of piracy and increased international solidarity of every kind.”<sup>8</sup>

The gap between North and South quoted above may be illustrated by the comparison of exports of music formats from Jamaica (including records, cassettes and compact discs) which totaled J\$13.3 million in 2004 compared to the imports of music formats which totaled J\$248.2 million in the same year.<sup>9</sup> The Caribbean region similarly has a large deficit in visible trade in the cultural sector, with imports of core cultural goods totaling US\$88.6 million in 2002 and export of only \$2.3 million.<sup>10</sup> However it is important to recognize that cultural trade increasingly is represented by services and intangible products (e.g. digital content) which are less easily captured by official trade statistics.

The global framework within which the creative industries operate include the Trade Related Intellectual Property Rights (TRIPS) Agreement concluded in 1995 within the framework of the World Trade Organization (WTO), and its extensions, the World Intellectual Property Organization (WIPO) Copyright Treaty and the WIPO Performances and Phonograms Treaty, both in 1996. The UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions (2005) seeks to provide an international framework of mutual respect and protection of diverse cultures within which cultural and creative industries can be developed.

### **Size and Structure of Creative Industries in Jamaica**

While there is limited data on the size of the creative industries in Jamaica there is evidence of its economic importance. A recent study indicated that the Copyright Sector contributes about 5.1% to the GDP of Jamaica, and accounts for 3.0% of all employment

---

<sup>7</sup> Chevannes in *PIOJ Jamaica Human Development Report 2005*. Other estimates of the annual earnings from Jamaican music range from US\$60-100 million (Witter 2002).

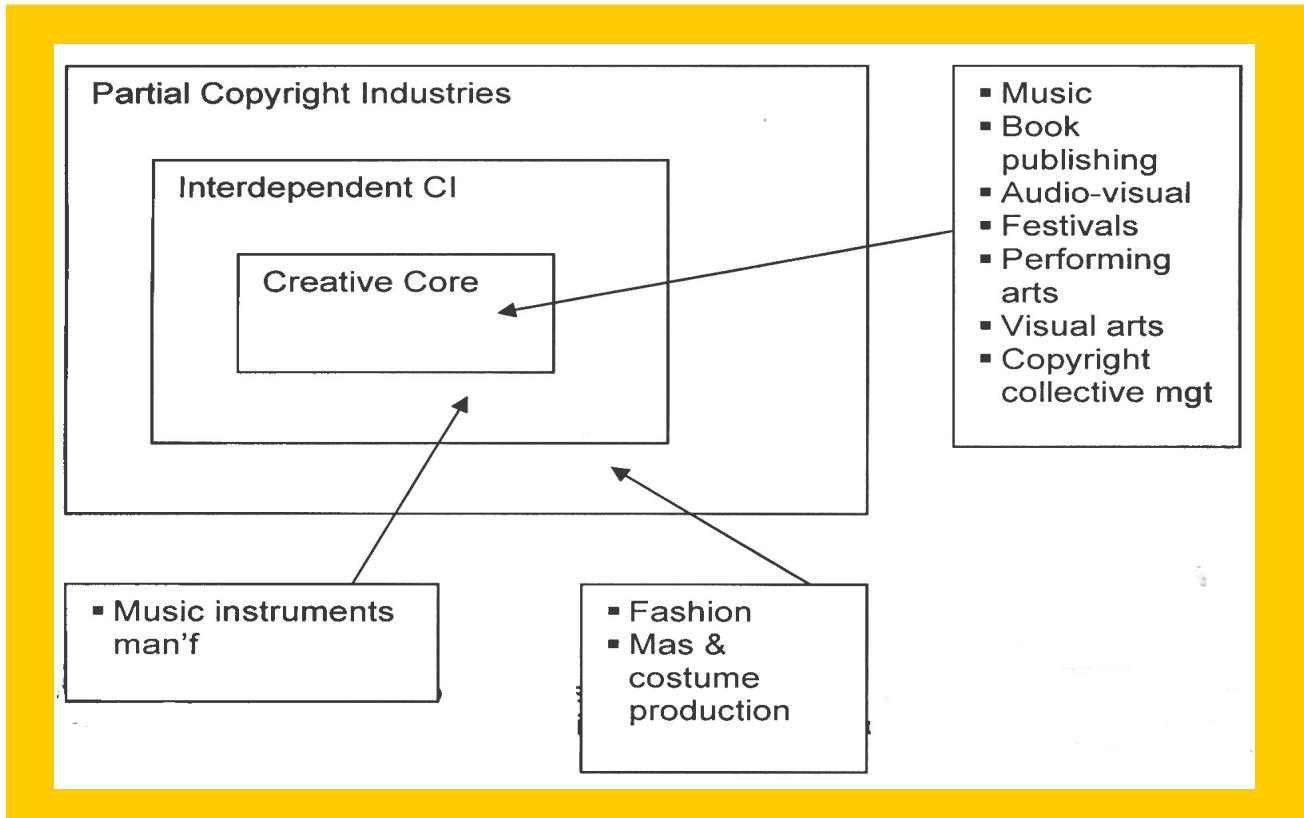
<sup>8</sup> <http://portal.unesco.org/culture>

<sup>9</sup> ESSJ

<sup>10</sup> Nurse, Keith et al. (2006).

in Jamaica.<sup>11</sup> The following figure provides a general typology of the creative industries and their relationship to the core copyright sector which is also relevant for Jamaica. International comparisons indicate that the copyright industries contributed up to 7.8% of GDP in the United States in 2001, 5% of GDP in Australia in 2000 and 3% of GDP in Singapore in 2000.<sup>12</sup>

**Figure 1: Typology of Cultural / Creative Industries**



Source: Nurse, Keith et al. (2006). *The Cultural Industries in CARICOM: Trade and Development Challenges (Draft)*.

The Jamaican creative industries have linkages to a number of economic sectors including tourism, and primarily include three categories of participants: performers and primary creators, producers of media content, and representatives and support personnel.<sup>13</sup> The number of musicians and singers in Jamaica has been estimated to be 2500 including members and non- members of the Jamaica Federation of Musicians (JFM).<sup>14</sup> As many of the persons employed have limited formal education, the creative

<sup>11</sup> Inclusive of the Core Copyright Sector, Non-dedicated Copyright Support Sectors, Interdependent and Partial Copyright Sectors (James 2007).

<sup>12</sup> Singapore Creative Industries Development Strategy (see [http://www.mica.gov.sg/mica\\_business/b\\_creative.html](http://www.mica.gov.sg/mica_business/b_creative.html))

<sup>13</sup> Another important category particularly in the international context includes the manufacturers and distributors of audio-visual playing devices and apparatus, entertainment production equipment and musical instruments (Stanbury 2006).

<sup>14</sup> Witter (2002).

industries have offered particular opportunities for advancement to members of poor communities. The creative industries in Jamaica consist primarily of relatively small firms and individuals, many operating in the informal sector, with few large, well established companies.

Some indicators of the growth of the local entertainment industry include the increase in the stock of loans and advances to the industry which stood at J\$345.9 million at the end of 2005, up 11.6% from 2004; the increase in the number of projects administered annually by JTI's Film and Music Division from 82 in 2001 to 121 in 2005; and increase in the number of plays and drama productions staged in Jamaica from 24 in 2002 to 42 in 2005.

There are a wide range of institutions and stakeholders involved in various aspects of the creative industries. The Ministry of Tourism, Entertainment and Culture (MTEC) has the overall responsibility for setting national policy on creative industries and oversight of agencies involved in the development of creative industries. The Cultural Industries Council has been established to provide support to MTEC through formulating marketing and product development plans for the cultural industries, developing a comprehensive cultural industries policy, establishing and managing a cultural industries development fund, and commissioning a cultural industries labour market survey. The Jamaican Film Music and Entertainment Commission, a division of Jamaica Trade and Invest (JTI) (formerly known as JAMPRO), has responsibilities for promotion and development of Jamaica as a location for the creative industries. The leading training institutions for the creative industries include the Edna Manley College of the Visual and Performing Arts and the Creative Production and Training Centre (CPTC), while the range of cultural institutions include the Jamaica National Heritage Trust, Institute of Jamaica, African Caribbean Institute, Jamaica Cultural Development Commission (JCDC) and the National Gallery of Jamaica.

The industry associations representing performers and primary creators include the Jamaica Federation of Musicians & Affiliated Artistes Union (a 40 year-old trade union which represents singers and musicians in Jamaica), the Jamaica Association of Vintage Artistes and Affiliates (JAVA), Jamaica Association of Dramatic Artists (JADA), and the Jamaica Association of Female Artists (JAFA). Associations representing producers in the creative industries include the recently-established Recording Industry Association of Jamaica (RIAJam), Jamaica Film and Video Producers Association (JFVPA) and the Association of Independent Programme Providers, while the Media Association of Jamaica represents the media owners.

There are also a number of institutions established to protect various aspects of the intellectual property rights of participants in the creative industries, including the Jamaica Songwriters Guild, the Jamaica Association of Authors Composers and Publishers (JACAP), a songwriters and music publishers copyright collection agency, and the Jamaica Performers Administration Society (JPAS) established to represent the rights of musical performers. In addition the Jamaica Anti-Piracy Alliance (JAPA) was formed in 2005 as a partnership of JACAP, the Jamaican Copyright Licensing Agency



(JAMCOPY), RIAJam, Business Software Alliance (BSA), Sound System Association of Jamaica (SSAJ), JADA, and a number of other entities.<sup>15</sup> Appendix 5 provides a summary list of the main stakeholders in the creative industries and sport in Jamaica.

While these institutions offer a framework for the development of the creative industries, they also have constraints that limit their effectiveness. There is fragmented responsibility and inadequate coordination between public sector agencies, while many of the industry institutions are relatively young with small staff and resource bases. The limitations in effectiveness of industry institutions related to intellectual property rights are underscored by estimates of unclaimed royalties due to Jamaicans in overseas markets (for example it is estimated that over US\$20 million of unclaimed public performance royalties due to Jamaicans exist in France alone), because Jamaica still lacks effective rights administration agencies to track royalties due to local creative persons from public performances and use of recorded music.<sup>16</sup>

The weakness of institutions is compounded by the fact that in to date in most Caribbean countries the creative industries have not received priority attention as targets for investment and trade and industrial policy. However in Jamaica there have been a number of policy initiatives undertaken in recent years to highlight the importance of the creative industries. The National Industrial Policy of 1996 identified tourism, entertainment and sport as priority industries in for the long-term development of Jamaica. A number of incentives have been put in place for the creative industries including duty free importation of musicians' Tools of Trade, and the Motion Picture Industry Encouragement Act which provides tax-free concessions on income earned from overseas release of film and video, and duty-free and tax-free concessions on equipment, machinery and materials for the building of studios and support facilities. The National Culture Policy of 2003 highlights the economic potential of cultural industries and the important linkages between culture and other economic sectors particularly trade, tourism and information and communication technology. The Policy also identified the importance of cultural products as vectors of identity, values and meaning that reflect a community's way of being and understanding.

### **Future of Jamaica's Creative Industries**

The establishment of the CARICOM Single Market and Economy (CSME) will provide a new regional context in which the creative industries will operate, allowing free movement throughout the region without work permits for artists and musicians, and creating a larger regional market for cultural goods and services. However there have not yet been any significant attempts to establish a regional association of persons in creative industries, or to create other mechanisms for regional collaboration.

An Entertainment Policy has been drafted by the Ministry of Tourism, Entertainment and Culture to guide the long-term development of the entertainment industry, while a National Strategy and Action Plan for the Jamaican music industry was completed in

---

<sup>15</sup> Stanbury (2006).

<sup>16</sup> Stanbury (2006).

2004.<sup>17</sup> A draft development plan for the creative industries also is being prepared by JTI. These plans recognize the importance of the export market for Jamaica's creative industries which far exceeds the size of the domestic market. Indeed JTI's vision is that by 2012 Jamaica will be "a global hub for creative industries".

In developing the full potential of its creative industries Jamaica can learn from other countries such as Singapore and Brazil, that have targeted the creative industries as development priorities and instituted measures including establishment of key lead cultural institutions, launching catalytic initiatives to stimulate demand for creative products and services including in the public sector, development of creative clusters, and promotion of public-private sector partnerships to support entrepreneurship and integrate creative design in business enterprises. The potential of the creative industries to contribute to long-term national development is highlighted by the projection by Singapore in its Creative Industries Development Strategy that the contribution of its creative industries will double from 3% in 2000 to over 6% by 2012.<sup>18</sup>

Jamaica has demonstrated the appeal of its creative industries in export markets. Reggae music sales in the U.K. market averaged over £25 million annually from 1991-2002, ranging from 1-4% of total music sales in that market. Jamaican reggae and dancehall artistes account for half of the top twenty best selling Caribbean artists in the US market, with Bob Marley far outstripping all others with 12 albums or videos that have gone gold, platinum and multi-platinum, followed by Shaggy, Sean Paul and Peter Tosh.<sup>19</sup> The island has been the location for many successful international motion pictures (e.g. Cool Runnings and Cocktail) and the Jamaican Film Commission has serviced over 3,000 film projects since its establishment in 1984, ranging from the full-length feature film to documentaries and photo shoots. Jamaican fashion models have been successful in regional and international markets, while local festivals dedicated to various aspects of Jamaican cuisine and marketed to Jamaican residents and tourists have shown significant growth in recent years.

The concept of "Brand Jamaica" has received much attention in recent years. However the concept may be interpreted at a number of levels, including as: i) a collective marketing strategy between producers in the creative, leisure, apparel, sport and food and beverage sectors; ii) an intellectual property initiative to protect Jamaican products and services with geographical indicators; iii) a programme of JTI to promote the favourable aspects of Jamaica as a location for trade and investment; and iv) the broad appreciation of the global "share of mind" enjoyed by Jamaica as the cumulative result of the recognition earned from the island's achievements in creative industries, sport and other areas. It will be important to leverage the relevant aspects of Brand Jamaica for the long-term development of the island's creative industries.

---

<sup>17</sup> Brown (2004).

<sup>18</sup> Singapore Creative Industries Development Strategy (2006)

<sup>19</sup> Nurse, Keith et al. (2006)

## 2.2 Overview - Sport

Jamaica also has demonstrated the ability of its sportsmen and sportswomen to compete successfully at the highest international levels over a period which spans at least the past seventy years. Athletes such as Herb McKenley, Donald Quarrie, Merlene Ottey, George Headley, Michael McCallum, Veronica Campbell and Asafa Powell have become national icons who have contributed to the fame of Jamaica in ways that are comparable to the contributions made by the island's most famous creative artistes. The successes of national sporting teams such as the Reggae Boys and Sunshine Girls in international competitions have provided occasions for unprecedented demonstrations of national pride and unity.



While the greatest successes have come in track and field events, the range of sports in which Jamaicans have recorded significant international achievements also include cricket, football, netball, boxing, tennis, cycling, swimming, bobsledding and table tennis. While a full discussion of Jamaica's sporting accomplishments is beyond the scope of this sector plan it is relevant to note that these achievements have not rested only on the raw talents of athletes but also have been supported in most cases by sustained programmes of training and development involving collaboration between the public sector, private sector and voluntary organizations. The most successful example of this model has been the ongoing partnership between the Jamaica Olympic Association (JOA), and national sporting organizations such as the Jamaica Amateur Athletic Association (JAAA), the Institute of Sport (Inspport) and private sector sponsors that has contributed to the world-class achievements of Jamaican athletes at the junior and senior levels for over half a century.

### Policy and Institutional Framework

The National Sports Policy of 1994 seeks to use Jamaica's comparative advantage in sports to support economic and social development and included the establishment of the National Council on Sport. The National Industrial Policy (NIP) of 1996 also targeted sport as a strategic priority for Jamaica's economic development. Overall policy guidance for the development of sport in Jamaica rests with the Minister responsible for Sport, presently within the portfolio of the Office of the Prime Minister. Inspport is the main public sector institution responsible for promotion of the development of sport, including sport development in primary and junior high schools and community sports programmes. The Inter Secondary Schools Association (ISSA) was founded in 1910 with the mandate to facilitate the development of secondary school sports through competition, including flagship events such as Boys and Girls Champs (track and field), Manning and DaCosta Cups (football), and the Sunlight Cup (cricket). A total of some 23,792 students participated in ISSA competitions in 2006. At the tertiary level the GC Foster College is the main sports education institution, the only one of its kind in the

English-speaking Caribbean, with degree, diploma and certificate programmes, and the capacity to train physical education teachers for Jamaica and the Caribbean region.

The main organizations responsible for sport development beyond the school system include the Social Development Commission (SDC) which guides organized sport activities at the community level, and a range of sport associations which promote and organize recreational and competitive activities for particular sports. The Jamaica Olympic Association has overall responsibility for sports that are part of the Olympic Games. The main national sporting associations include the Jamaica Badminton Association, Jamaica Cricket Association, Jamaica Special Olympics Association, Jamaica Football Federation (JFF), Jamaica Basketball Association, Jamaica Netball Association, Jamaica Hockey Federation, Amateur Swimming Association of Jamaica and the Jamaica Amateur Athletic Association (JAAA). While Jamaica enjoys a wide range of sport associations, many of these organizations, particularly in sports with smaller participation, are constrained by capacity weaknesses including limited funding and human resources, and in many cases operate primarily on a voluntary basis. While Jamaica is relatively well provided with sport trainers particularly in track and field there are inadequate numbers of supporting personnel including sport administrators and managers.<sup>20</sup>

### **Funding and Infrastructure**

Funding for the development of sport in Jamaica has come from a range of sources. The government budgetary allocations to sport have increased from \$10.2 million in 1990/91 to \$116.6 million in 2005/06. Other funding sources include the Sports Development Foundation Limited (SDF) which has provided an annual average of \$49.5 million in project funding over the period 1999 – 2005 for the development of sport infrastructure and facilities island wide, as well as over \$65 million annually in funding support for national sport associations. The SDF also provides funding to sport institutions and grants to elite athletes to enable participation in international competitions. The CHASE Fund also was established in 2002 to consolidate funding for social sector projects including sport through tax revenues derived from the domestic gaming industry.

The range of sport facilities in Jamaica, include at least twelve major venues with the capacity for hosting major sporting events. The largest and most important venue is the Independence Park Complex in Kingston which includes the National Stadium, National Arena and National Indoor Sport Complex, along with additional facilities for football, track and field, swimming, basketball and netball. Other major facilities are located in various parishes throughout the island including the Trelawny Multi-Purpose Stadium, Sabina Park (Kingston), Jarrett Park (St. James), Brooks Park (Manchester), and Carder Park (Portland). The range of sport facilities in Jamaica also includes facilities at schools, youth clubs, community centres, parks and other locations throughout the island. However there are insufficient funds to maintain existing sporting facilities adequately and there are inadequate institutions and infrastructure to support the development of

---

<sup>20</sup> Beckford (2007)

world-class activities and athletes within Jamaica. Consequently the majority of Jamaican athletes that have achieved international standards have based their training overseas.

### **Social and Economic Roles of Sport**

While there is limited information on the levels of participation in recreational and competitive sport in Jamaica, there are existing policy initiatives that seek to expand and broaden the participation in sport, including policies on healthy lifestyles, the disabled, youth and the elderly. Sport has important social benefits including contributions to physical and mental health, socialization of children and adolescents, and community development. In the Jamaican context sport has particularly important roles in building unity at the national and community levels, including bridging divisions created by political tribalism.

Sport also represents a source of wealth for a wide range of occupations, including athletes, coaches, trainers, managers, promoters and entrepreneurs. However, while Jamaican individuals and teams have enjoyed remarkable successes in international competitions, the economic potential of sport in Jamaica has not yet been developed in a significant way. There are no fully professional sport leagues and relatively limited linkages with other sectors such as tourism, entertainment, health and wellness, printing and manufacturing. There is lack of focus on business opportunities in sport in Jamaica, while the development of the economic potential of sport is also limited by inadequate levels of business skills and technology application in sport and limited financing for sporting ventures.

In charting the future for the development of sport in Jamaica it will be necessary to learn from the experiences of other countries that have successful sport sectors. In this regard Australia offers a model with aspects that may be considered for Jamaica, including establishment of the Australian Institute of Sport as a center for the development of elite athletes, investment in sport facilities, research and development including sport science and medicine, and capacity development of clubs and sport associations.

### **2.3 Issues and Challenges – Creative Industries and Sport**

#### **1. Institutions and Infrastructure:**

While Jamaica has achieved success in popularizing aspects of its culture it lacks the full set of institutions and infrastructure to support world-class creative industries and sporting activities. The main issues include the following:

- Government institutions related to the creative industries are fragmented and lack adequate coordination. There is duplication in several functions including planning, marketing and training, thus leading to stretching of limited resources among agencies and lack of clear leadership and responsibilities.
- Partnerships and collaboration between government and the private sector have been relatively limited in both the creative and business aspects of the industries

- There is lack of common national vision and integrated plan for music and cultural industries
- The existing bureaucratic regimes for creative industries and sport including import and export procedures need improvement to reflect the particular requirements of these industries
- Jamaica does not have adequate numbers of properly equipped indoor and outdoor venues to support music festivals, shows and other creative performances, despite the high numbers of events held in the country annually
- There is need for construction and maintenance of infrastructure for sports including at the national and community levels

### 2. Intellectual Property:

The development of creative industries and the economic potential of sport will depend on intellectual property as the fundamental resource. While Jamaica already possesses the fundamental legal framework for protection of intellectual property, the long-term development of the creative industries and sport will require planning to address the challenges of strengthening the ability to protect and use this resource effectively for the benefit of its creators and the country. In this regard the following issues will be relevant:

- Collecting societies in Jamaica are relatively young and lack adequate capacity, resulting in loss of income to the creative industries, including sums of uncollected royalties owed to Jamaican artists and net outflows of royalty payments from Jamaica
- There is relatively low appreciation among the creative industries and the general public of the importance of intellectual property rights
- Need for strengthening capacity of institutions involved in intellectual property regime including Jamaica Intellectual Property Organization (JIPO), Intellectual Property Centre (IPC) and Jamaica Musical Rights Administration (JMRAS)
- Existing high levels of piracy due to fragmented distribution and protection and lack of copyright registration system and copyright enforcement to counter piracy
- Jamaica is not part of a number of critical intellectual property treaties and conventions including the Madrid Treaty

### 3. Industry Development:

The development of the creative industries will require a wide range of measures aimed at addressing weaknesses in their structure and functioning. The main issues relating to the industry development of the creative industries include:

- Distribution of cultural products and services represents a problem facing the creative industries. Local creative artists and entrepreneurs lack adequate market intelligence and market penetration. There are few distributors of Jamaican music in the main export markets including the United States, United Kingdom and Japan. The dominance of marketing and distribution channels by entities located

- in the developed countries reduces the channels available to Jamaican creators to reach their target markets. In this regard increasing local ownership and control of the creative industries will increase the value retained and the benefits that accrue to Jamaicans, and enhance Jamaican influence on production and marketing of creative products and services.
- Facilitating the development of marketing and distribution channels will create value-added opportunities, expand market opportunities and increase foreign exchange earnings. However introducing new creative art forms to global, regional and national markets requires meeting competition with content from the main cultural exporters such as the USA, U.K. and India that are backed by high levels of expenditure on marketing by global firms. The growth of electronic media for the distribution of digital content offers opportunities for widening the marketing and distribution options for creative products and services from Jamaica.
  - The creative industries are characterized by high numbers of MSMEs and individual entrepreneurs, many of whom function in the informal sector. The fragmentation and small scale of local entities suggest fostering collaboration, networking, joint-ventures and industry clusters, as well as greater mutual trust among industry players and stakeholders and encouraging enterprise and entrepreneurship in the creative industries
  - Many persons and enterprises in the Jamaican creative industries are perceived as inconsistent and unprofessional in their business relations, lacking modern levels of business methods and consistent standards of quality and delivery. Strengthening the productive capacity of the creative industries will require improvements in product quality, product development, technology, manufacturing capacity and packaging as well as addressing gaps in business culture and management practices including documentation, contracts and copyright protection
  - The creative industries do not receive the same levels of financing and access to capital as enjoyed by other sectors in the economy, partly due to the view of the industries by mainstream financial institutions as risky and disorganized.
  - Similarly the development of sports-related enterprises will require availability of adequate financing sources
  - The potential for inter-sectoral linkages between the creative industries and other sectors in the economy including tourism, information technology and sports has not been developed in a comprehensive manner to date.
  - There also has been historically a bias against indigenous content in the Jamaican market that limits the scope for local entrepreneurship and market development of the creative industries
  - Many of the challenges faced by MSMEs (e.g. limited access to credit, high costs of export marketing and inadequate institutional capacity) are also applicable to the cultural industries sector.
  - Increased emphasis will be needed on development of economically viable sports-related enterprises, including sports tourism, branded merchandise, gyms, sporting goods outlets and sports media products

- The development of professional and semi-professional leagues in sports such as football, basketball and netball should be explored and fostered where viable
- Increased private sector involvement in funding of sports development programmes.

#### 4. Human Resource Development:

The natural creative talent of the Jamaican people will require ongoing programmes of education and training to ensure that these human resources and talents are developed to their full potential to meet the standards of domestic and international markets in the entertainment and cultural industries and address the gaps in the training opportunities offered at the various creative education and training institutions in Jamaica. Similarly the development of sport will require increased numbers of trained personnel at all levels. The human resource development of the creative industries and sport will include addressing the following issues:

- Music and other creative subjects are being offered in a limited manner at the primary and secondary levels, and there is an inadequate supply of creative arts teachers to support the curriculum.
- There is only one tertiary educational institution dedicated to the creative industries, namely the Edna Manley School for the Performing Arts, located in the capital city of Kingston. The creative industries will benefit from the establishment of other tertiary institutions in other regions of the island, as well as meeting needs for upgrading at existing educational and training facilities and institutions, including the integration of business management and support services for entertainment and cultural industries into the curricula of tertiary institutions
- Limited capacity of institutions such as National Performing Arts Foundation (NPAFJ) and UWI Reggae Studies Unit
- There are inadequate numbers of trained personnel in sport, including sport administrators and managers

#### 5. Sector Information:

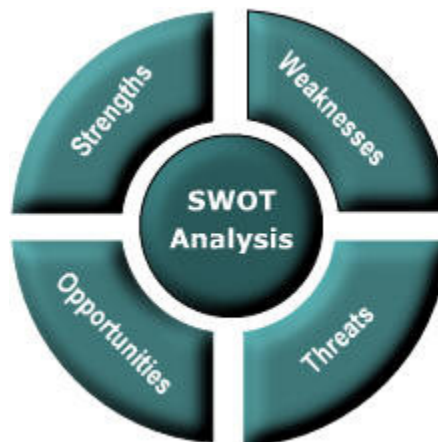
As for a number of other sectors including tourism, distribution and micro and small enterprises there is a lack of adequate statistics and information on creative industries and sport to provide a basis for planning and monitoring or to evaluate their economic impact in domestic and international markets. There are no well designed and implemented systems of data collection on the creative industries and sport, leading to an absence of good data on the performance and contribution of the creative industries to the Jamaican economy. In this regard it should be noted that many industry entrepreneurs are reluctant to provide the necessary data on their operations due to mistrust of government and for purposes of tax evasion.





### 3. SWOT Analysis

CREATIVE INDUSTRIES AND SPORT have the potential to make significant contributions to the sustainable development of countries such as Jamaica. A standard tool of strategic analysis is SWOT analysis, which seeks to identify the main strengths, weaknesses, opportunities and threats for a given entity, ranging from a nation to a sector to an individual enterprise. For Creative Industries and Sport in Jamaica the identification of strengths and weaknesses represents the internal assessment of these areas while the consideration of opportunities and threats represents the analysis of the external environment for these areas.







The SWOT analysis, along with the Situational Analysis presented above, forms the basis for identifying goals, objectives and strategies that may be employed to apply the strengths and address the weaknesses of the sector, and capitalize on the opportunities and mitigate the threats to the long-term development of the sector.

The SWOT analysis for Creative Industries and Sport in Jamaica is presented in Table 1 below.



**Table 1: SWOT Analysis – Creative Industries and Sport**

Creative Industries

<b>Internal Analysis</b>	
 <p style="text-align: center;"><b>Strengths</b></p> <ul style="list-style-type: none"> <li>• Abundant talent</li> <li>• World-class achievements</li> <li>• Varied and valuable cultural and heritage resources</li> <li>• Increasing involvement of local and community groups in creative enterprise</li> <li>• Growth in creative enterprises</li> <li>• Increased collaboration between tourism, cultural, entertainment and sports sectors</li> <li>• Awareness of ourselves as distinctive people</li> <li>• Strength of “Brand Jamaica”</li> <li>• Modern copyright regime in place; Jamaica party to relevant IP agreements/international treaties</li> </ul>	<p style="text-align: center;"><b>Weaknesses</b></p>  <ul style="list-style-type: none"> <li>• Insufficient measurement and monitoring of sector</li> <li>• Insufficient capacity and financial support for institutions and infrastructure for culture and world-class entertainment industry</li> <li>• High levels of piracy</li> <li>• Limited capacity to enforce intellectual property rights</li> <li>• Insufficient knowledge of, support by and benefit by stakeholders of existing rights management systems</li> <li>• Insufficient business management capacity in creative industries</li> <li>• Inadequate institutional financing for creative ventures</li> <li>• Insufficient budgetary allocation for development of the sector</li> <li>• Inadequate human resource development for creative industries</li> <li>• Insufficient incentive for retention/holding earnings from creative industries in Jamaica</li> <li>• Insufficient regard and respect for the worth and economic value of creative industry professions and professionals</li> <li>• Gaps in existing rights management system</li> <li>• Inadequate linkages with other economic sectors</li> <li>• Fragmentation, lack of coordination and duplication of roles among agencies</li> <li>• Inordinate delay in implementing some treaties through domestic law and reform of other relevant laws</li> </ul>



External Analysis	
 <p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>• Growth in economic value of global cultural industries and markets</li> <li>• Growth of media channels and demand for content</li> <li>• High awareness of and demand for “Brand Jamaica”</li> <li>• Existence of West Indian diaspora as market for local creative products</li> <li>• Development of bilateral and international agreements for intellectual property rights and support for creative industries</li> <li>• Value of Internet in creating new markets, business opportunities and channels for exposure and distribution of cultural products</li> <li>• Cheaper and more user- friendly technology</li> <li>• Widening of the regional market through CSME</li> </ul>	<p><b>Threats</b></p>  <ul style="list-style-type: none"> <li>• Low degree of local ownership and control of creative industries resulting in low retention of value-added</li> <li>• Increasing use of technology reduces creative input of performers and artistes</li> <li>• Low level of understanding by Jamaican private sector of business intricacies of creative industries</li> <li>• The negative implications of including creative industries in the WTO trade regime</li> <li>• Impact of negative activities on the image of Jamaica</li> <li>• Potential loss of comparative advantage in Jamaican cultural products through increased quality and use by other countries of Jamaican symbols and arts</li> <li>• Potential erosion of geographic indicators for Brand Jamaica through imitation by competitors</li> </ul>

Sport

Internal Analysis	
 <p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>• Abundant natural athletic abilities</li> <li>• Demonstrated world-class talent in sports</li> <li>• Varied and favourable cultural and environmental factors</li> </ul>	<p><b>Weaknesses</b></p>  <ul style="list-style-type: none"> <li>• Limited information on the sector</li> <li>• Poor knowledge of media in gathering information resulting unclear message</li> </ul>

<ul style="list-style-type: none"> <li>• Increasing awareness of the importance of sport</li> <li>• Increasing involvement of local and community groups in sporting endeavours</li> <li>• Improving local systems and infrastructure for development of athletes, administrators, and technical staff</li> <li>• Greater opportunities to access advanced training locally in some sports</li> <li>• General passion for sports by Jamaicans across both genders</li> <li>• Government’s commitment to funding sports development</li> <li>• Strong Jamaican presence in international sporting organizations</li> <li>• Media’s commitment to greater coverage of sporting events</li> <li>• Improving private sector support for sporting associations and events</li> <li>• Experience in successfully hosting international events</li> </ul>	<p>disseminated to public</p> <ul style="list-style-type: none"> <li>• Inadequate institutions and infrastructure to support the development of world-class activities and athletes</li> <li>• Lack of requirement by law for the provision of adequate recreational facilities in housing and community developments</li> <li>• Lack of maintenance of existing sporting facilities.</li> <li>• Insufficient funding to support all levels of each sport</li> <li>• Inadequate marketing capabilities of the sporting organizations to garner potential revenue and spectator support</li> <li>• The absence of player welfare, mentorship and support systems to enhance the total development of the athlete and the sport</li> <li>• Social and educational environment does not provide holistic development for athletes to enable them to maximize their fullest potential in sport and develop life skill and the advancement of the sport.</li> <li>• Nutritional deficiencies and inadequate medical facilities for sport</li> <li>• Inadequate development of business skills</li> <li>• Absence of recognition of business opportunities in sport in Jamaica</li> <li>• Inadequate financing for sporting ventures</li> <li>• Insufficient linkages with other sectors including tourism, health and wellness, printing and manufacturing</li> <li>• Low level of technology application in sport</li> <li>• Lack of coordination and centralization of sports administration under one ministry</li> </ul>
--	---

**External Analysis**

 <p style="text-align: center;"><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>• Opportunity for growth of athlete management services and training of sports administrators</li> <li>• Development of bilateral and</li> </ul>	<p style="text-align: center;"><b>Threats</b></p>  <ul style="list-style-type: none"> <li>• Political intervention</li> <li>• Loss of student athletes to overseas higher educational institutions</li> <li>• Loss of trained athletes to overseas markets</li> </ul>
---	--

<p>international agreements for sports development</p> <ul style="list-style-type: none"><li>• High international awareness and demand for “Brand Jamaica” and potential of Jamaican athletes</li><li>• Opportunity to attract international sponsorship for infrastructure development</li><li>• Growth of local and international media channels and demand for sports content</li><li>• Opportunity for increased employment in sport</li><li>• Opportunity for media sales internationally for sports products, programmes and facilities</li><li>• Opportunity for hosting international sports events based on geographic location, infrastructure, history of hosting international events and level of development in some sports</li><li>• Existence of West Indian diaspora as market for local sports content</li></ul>	<ul style="list-style-type: none"><li>• Impact of community violence on sports development and spectator support</li><li>• Improved sporting performance by competing international countries</li><li>• Low level of understanding by Jamaican organizations of business intricacies of sports</li></ul>
--	--

# Vision 2030 Jamaica: National Development Plan

## *Creative Industries and Sport Sector Plan*

### 4. Vision Statement for Creative Industries and Sport



THE LONG-TERM PROCESS of planning for Creative Industries and Sport is guided by a Vision that describes a future for these areas that is desirable for their stakeholders and that can be achieved through their own efforts within a realistic time frame.

The Sector Plan contains Draft Vision Statements for the Creative Industries and for Sport, which are based on the contributions of the stakeholders represented on the Creative Industries and Sport Task Force and at the Creative Industries and Sport Sub-Committee meetings held during the Jamaica 2030 planning process.

#### 4.1 Vision Statement – Creative Industries

The Draft Vision Statement for the Creative Industries in Jamaica is:

*“Unique, authentic and indigenous Jamaican creative industries that:*

- *Reflect and contribute to national pride and identity;*
- *Are major drivers of economic growth and employment with adequate funding and investment for sustainable development and dynamic linkages to other economic and social sectors at national, regional and global levels;*
- *Respect the intellectual property rights of creators and allow them to benefit financially in an equitable way from respected viable professions and occupations;*
- *Are supported by strengthened policy and institutional framework at micro- and macro-levels; and*
- *Benefit from enhanced educational and training institutions and programmes producing a skilled, innovative, competitive and creative workforce.”*

## 4.2 Vision Statement – Sport

The Draft Vision Statement for Sport in Jamaica is:

*“Sport uniting Jamaica and contributing to national pride through successful performances in and hosting of competitions, with adequate range of facilities and institutions to ensure maximum participation and contribution to human, social and economic growth and development, and comprehensive sport development appropriate for all levels.”*

## 4.3 Strategic Vision

The long-term strategic vision for Creative Industries and Sport in Jamaica is built on a number of fundamental elements, including the following:

- i) Ensuring that the necessary conditions are in place for creative industries and sport to take full advantage of the significant competitive and human resources possessed by Jamaica and to apply them for long-term economic and social development;
- ii) Improvement of the policy and business environment for creative industries and sport in Jamaica;
- iii) Development of the management, technical and technological capacity within the creative industries and sport to support successful economic performance;
- iv) Greater integration of creative industries and sport with other economic and social sectors;
- v) Ensuring that the long-term development of creative industries and sport serve to enhance the potential for individual and national development and protect the artistic and cultural heritage of Jamaica;
- vi) Ensuring the ability of creative industries and sport to meet relevant world-class standards consistently.

This strategic vision is expressed in the strategic framework for Creative Industries and Sport for Jamaica 2030 presented below.

**Vision 2030 Jamaica – National Development Plan**  
*Creative Industries and Sport Sector Plan*

**5. Strategic Framework for Creative Industries and Sport - Goals, Objectives and Strategies**

The strategic framework for the Creative Industries and Sport presents the Goals, Objectives and Strategies for the Creative Industries and Sport Sector in Jamaica over the timeframe covered by the Jamaica 2030 National Development Plan.

**Creative Industries**

Goals	Objectives	Strategies
<b>1. Valuable and Viable, Dynamic &amp; Innovative Creative Enterprises and Individuals</b>	1.1 Expansion of participation in creative industries	1.1.1 Define range of creative industries for Jamaica
		1.1.2 Identify and develop sources of financing that are appropriate for each category of products and services in the creative industries
		1.1.3 Increase access to participation in the creative industries
		1.1.4 Identify and reduce barriers to expansion of each category of products and services in the creative industries
		1.1.5 Develop public education programmes to promote awareness of importance of and business opportunities in creative industries
	1.2 Increased accessible high quality, diversified, knowledge-driven educational, training and research institutions and programmes for creative industries	1.2.1 Invest in acquiring and producing knowledge relative to the creative industries
		1.2.2 Increase the number and geographic locations of tertiary institutions for creative industries
		1.2.3 Include and expand creative curricula and programmes of primary and secondary schools



		1.2.4 Increase accessibility, relevance, quality, diversification and interdisciplinary integration of tertiary level curricula and programmes for creative industries
		1.2.5 Develop mechanisms to evolve high quality trainers at all levels
		1.2.6 Build physical and human capacity in existing educational, training and research institutions
		1.2.7 Develop linkages and partnerships with private sector companies, public sector agencies, other educational institutions and international development partners (IDPs)
		1.2.8 Develop financing sources for educational, training and research institutions
		1.2.9 Develop and support apprenticeship and internship programmes in creative industries
	1.3 Effective, cohesive, rationalized, responsive policy, legal and institutional framework	1.3.1 Strengthen coordination and rationalization between and within existing institutions with responsibilities for the creative industries
		1.3.2 Coordinate and align cultural policy with other policies that affect the creative industries
		1.3.3 Increase the consultation with and participation of creative industry stakeholders in the development of the policy, legal and institutional framework
		1.3.4 Create policy, legal and institutional arrangements that will foster the economic growth of the creative industries
		1.3.5 Establish processes to increase formalization of creative enterprises

	1.4 Effective industry structure with strengthened value chain that is flexible, relevant and fosters innovation and national, regional and global linkages	1.4.1 Develop analysis of the value chain for creative industries including local and international links, and identify Jamaican strengths
		1.4.2 Support and foster the development of new and innovative processes, products and business ideas in creative industries, including through incubation and innovation centers
		1.4.3 Build clusters and networks within the creative industries, both horizontal and vertical
		1.4.4 Develop effective linkages between creative industries and other economic and social sectors
		1.4.5 Establish strategic regional and global partnerships to support local creative industries including exchanges and co-production agreements
		1.4.6. Apply effective marketing and distribution mechanisms to develop full market potential of each category of creative products and services
		1.4.7 Enhance physical, human, institutional and financial capacity of creative enterprises, associations and individuals
		1.4.8 Develop and promote high-quality standards for globally competitive creative products and services
		1.4.9 Support the development of local professional performing companies
		1.4.10 Ensure representation of cultural and creative industries in relevant trade and investment negotiations at regional and global levels
		1.4.11 Support the inclusion and promotion of creative products and services in local media

		1.4.12 Promote application of ICT to production, distribution and marketing of creative products and services
	1.5 Intellectual property (IP) of creators protected and used as source of value	1.5.1 Strengthen the institutional, legal and regulatory framework for, and the use, awareness and value of intellectual property (IP)
		1.5.2 Define and develop role of the creative industries in the nation brand
		1.5.3 Ensure strong enforcement and protection of IP aspects of Brand Jamaica in the creative industries
		1.5.4 Prevent illicit trafficking in cultural goods
	1.6 Develop mechanisms for continual capturing, measuring, monitoring, evaluating and marketing of data, information and knowledge on creative industries	1.6.1 Develop appropriate research and measurement methodologies for each category of creative products and services
		1.6.2 Apply research and measurement methodologies to appropriate levels of creative industries including systems, enterprises and individuals
		1.6.3 Use data and information to improve policy framework, educational programmes and institutions and industry development programmes for creative industries
<b>2. Creative Products and Services that Reflect and Contribute to National and Cultural Heritage and Identity and to Human and</b>	2.1 Strengthened, modernized, cohesive and rationalized cultural institutions	2.1.1 Strengthen linkages between cultural institutions
		2.1.2 Identify and apply international best practices in policy and operations for cultural institutions
		2.1.3 Build physical, human and financial capacity in existing cultural institutions

<b>Social Development in Jamaica</b>		2.1.4 Rationalize cultural institutions to optimize use of resources and relevance
	2.2 Mechanisms established for ongoing capture and dissemination of information on cultural identity, values and attitudes and inter-relationships with each category of creative products and services	2.2.1 Promote public awareness of importance of cultural forms and retention of heritage
		2.2.2 Strengthen and institutionalize documentation of cultural forms
		2.2.3 Widen access to repositories of culture and heritage
		2.2.4 Promote innovative ways to expose people to and engender participation in Jamaican culture
		2.2.5 Develop mechanisms for creative industries to provide financial and resource support for cultural institutions and programmes
	2.3 Strengthened formal and informal education and training for national and cultural heritage	2.3.1 Develop relationships between cultural and educational institutions
		2.3.2 Develop and support apprenticeship and internship programmes in culture
	2.4 Strengthened mechanisms for the creative industries to promote and facilitate cultural heritage and identity and human and social development goals	2.4.1 Expand the role of creative industries in community development
		2.4.2 Use creative industries to promote broad environmental awareness and ensure sustainable environmental management in creative industries
		2.4.3 Strengthen ability of creative industries to promote social and economic inclusion
		2.4.4 Ensure central role of cultural and creative industries in the development and implementation of nation brand strategy

## Sport

Goals	Objectives	Strategies
<b>1. Sport For All</b>	1.1 Increased number of persons of all ages participating in recreational and competitive sports	1.1.1 Increase physical education and sports programmes in schools
		1.1.2 Increase organized sport activities in communities
		1.1.3 Develop public education programmes on the benefit of sport
	1.2 Gender equality in sport	1.2.1 Develop public education programmes on gender equality in sport
		1.2.2 Deepen media and private sector partnerships
		1.2.3 Encourage gender equality in all aspects of sport including management
	1.3 Establishment of adequate physical infrastructure for sport and recreation at accessible locations throughout the island	1.3.1 Design / upgrade community facilities for multi-use recreational and competitive sport including activities for the elderly and persons with disabilities
		1.3.2 Ensure multi-sport mini-stadium in each parish
	1.4 Development of increased numbers of trained sport administrators, coaches, managers and lawyers	1.4.1 Strengthen relationships among tertiary institutions
		1.4.2 Develop relevant curricula in secondary and tertiary institutions
		1.4.3 Adopt international best practices for training of sports personnel (including certification)
	1.5 Establishment of adequate administrative institutions for sport	1.5.1 Rationalize existing institutions (e.g. Ministry of Sport)
		1.5.2 Develop sport administration at primary, secondary, tertiary and national levels

		1.5.3 Establish a Sport Academy in Jamaica
	1.6 Establishment of appropriate and effective policies, legislation and regulations to promote sport participation	1.6.1 Develop legal framework for sport including relevant materials
		1.6.2 Update Sport Policy and align with other policies that affect sport
		1.6.3 Strengthen the framework for, and the use, awareness and value of intellectual property (IP)
		1.6.4 Create policy, legal and institutional arrangements that will foster the development of the sport sector
		1.6.5 Increase the consultation with and participation of sporting sector stakeholders in the development of the policy, legal and institutional framework
<b>2. Sport as Important Contributor to Economic Growth and Development</b>	2.1 Increased number of sport-related enterprises and employment and increased contribution of sport to Gross Domestic Product (GDP)	2.1.1 Develop awareness and public education programmes about the 'Business of Sport'
		2.1.2 Develop MSMEs geared at meeting the needs of the 'Business of Sport'
		2.1.3 Identify and access new and current sources of funding for sport-related enterprises – locally and internationally
	2.2 Establishment of major sport events and attractions in Jamaica	2.2.1 Develop sport museum as a resource centre for the attraction of visitors (local and foreign)
		2.2.2 Promote Jamaica as a sport-tourism destination
		2.2.3 Strengthen partnerships between national sporting associations, government and other public sector and private sector partners in initiating and hosting international events
	2.3 Linkages developed between sport and other economic and social sectors	2.3.1 Mobilize enterprises within the creative industries, manufacturing, gaming, tourism, agriculture, commerce and other sectors in expanding the value chain with sport

<b>3. Consistent Production of Elite Athletes</b>	3.1 Establishment of advanced sport development institutions and programmes in Jamaica	3.1.1 Establish strong research capabilities in sport
		3.1.2 Develop specialized centres of excellence within existing institutions
		3.1.3 Develop advanced sport programmes at Sport Academy
		3.1.4 Develop supporting facilities and services to facilitate the holistic development of the professional athlete
		3.1.5 Provide opportunities for participation in advanced sport development programmes in combination with tertiary education and ongoing employment
	3.2 Development of increased numbers of personal and team managers for athletes	3.2.1 Establish training programmes to produce certified sport managers
		3.2.2 Establish accreditation programme for experienced managers without certification
		3.2.3 Encourage formation of association of professional sport managers
	3.3 Increased opportunities for participation in world-class sport competitions at home and abroad	3.3.1 Encourage managers to become affiliated with world governing bodies
		3.3.2 Make provisions for institutions to allow elite athletes to fulfill national duties for participation in competition without penalties
		3.3.3 Increase hosting of competitions locally geared at attracting international competitors
		3.3.4 Develop financial support systems to create and sustain elite athletes

## **6. The Way Forward**

The 1<sup>st</sup> draft of the Sector Plan for Creative Industries and Sport will be presented to the Planning Institute of Jamaica upon completion, and then be forwarded to the Plan Advisory Group (PAG) for review and comment. Comments from the PIOJ and the PAG will be reviewed and discussed by the Task Force and incorporated into the draft sector plan.

Some key steps in the plan development process after completion of the 1<sup>st</sup> draft of the Sector Plan include:

1. Undertake consultations of the first draft with key stakeholders to be identified by the PIOJ, the Chair and the PAG
2. Development of an Action Plan – moving beyond initial strategies to the identification of actions, timelines, indicators and targets and responsibility centres
3. Application of T21<sup>21</sup> - run scenarios with individual/combined policy variable changes with T21; identify consistencies, and commence preparation of Second Draft Sector Plans including long-term and short-term action plans; identify inconsistencies, which may be caused by: resource constraints and/or unexpected interactions between variables
4. Submission of second draft of the sector plan by October 30<sup>th</sup>, 2007



---

<sup>21</sup> The application of T21 will be used where applicable and the where the scenario and data exists.



## 7. Appendices

### 7.1 Appendix 1 – List of Task Force Members

Mrs. Angela Patterson (Task Force Chairperson)	Chief Executive Officer, Creative Production and Training Centre (CPTC)
Mr. Wayne Wright	Special Events Coordinator, Jamaica Cultural Development Commission (JCDC)
Mrs. Del Crooks	Manager, Film, Music and Entertainment, Jamaica Trade and Invest (JAMPRO)
Mrs. Natalie G.S. Corthésy	Director of Entertainment Policy, Ministry of Tourism, Entertainment and Culture
Mr. Sydney Bartley	Principal Director, Entertainment Policy, Ministry of Tourism, Entertainment & Culture
Mrs. Eleanor Henry	General Manager, Media Association of Jamaica
Mr. Desmond Young	President, Jamaica Federation of Musicians & Affiliated Artistes Union
Mr. Cleveland Browne	Chairman, Recording Industry of Jamaica
Ms. Kenia Mattis	Consultant - Markets, Jamaica Trade and Invest (JAMPRO)
Mr. Cordel Greene	Executive Director, Broadcasting Commission
Mrs. Lonnelle Fisher-Lynch	Manager, Copy right and Related Rights Directorate, Jamaica Intellectual Property Organization (JIPO)
Mr. Burchell Duhaney	Principal, Edna Manley College of the Visual and Performing Arts
Ms. Denise Salmon	Vice-Principal for Administration and Continuing Education, Edna Manley College of the Visual and Performing Arts
Mr. Brian Breese	Cricket Operations Officer, Jamaica Cricket Association
Mr. Paul Campbell	First Vice-President, Jamaica Cricket Association
Mrs. Marva Bernard	President, Jamaica Netball Association
Mr. Ludlow Watts	General Manager, Sports Development Foundation
Mr. Ian Andrews	Administrative Director, Institute of Sports Ltd.
Mrs. Symone Betton	Ministry of Foreign Affairs and Foreign Trade
Ms. Tracey-Anne Clarke	Edna Manley College/Common Purpose Consultancies
Ms. Clarecia Christie	Independent Consultant
Ms. Carole Beckford	Senior Consulting Officer – Corporate Communications, Jamaica Trade & Invest
Ms. Kayanne Taylor	Lobbyist, Target Growth Competitiveness Committee, Jamaica Trade and Invest (JAMPRO)
Ms. Eileen Heaven	Executive Director/Consultant, Digital Phenomena Limited
Mrs. Carol Mahabir	Consultant, Digital Phenomena Limited
Mr. Howard Moo Young	Faithworks Limited/Mooimages
Mr. John Eyre	President, Amateur Swimming Association of Jamaica

Ms. Jackie Walter	Technical Director – Swimming, Amateur Swimming Association of Jamaica
Mr. Bruce McFarlane	Assistant Administrative Director, Institute of Sports Ltd.
Mrs. Tanya Lee	Marketing Manager, SportsMax
Mr. Basil Fletcher	Statistician /Economist, Jamaica Racing Commission
Ms. Grace Jackson	Sports Director, University of the West Indies, Mona
Mrs. Yvonne Kong	Principal, G.C. Foster College

## **7.2 Appendix 2 – Listing of Task Force Meetings**

### **Creative Industries and Sport Task Force**

- Thursday, April 5, 2007
- Friday, September 7, 2007

### **Creative Industries Sub-Committee**

- Thursday, April 19, 2007
- Friday, May 4, 2007
- Friday, May 25, 2007
- Tuesday, June 5, 2007
- Tuesday, June 19, 2007
- Tuesday, June 28 2007
- Monday, July 9, 2007

### **Sport Sub-Committee**

- Thursday, April 25, 2007
- Thursday, May 3, 2007
- Thursday, May 31, 2007
- Thursday, June 7, 2007
- June 14, 2007

## **7.3 Appendix 3 – List of Acronyms**

GDP	Gross Domestic Product
GOJ	Government of Jamaica
KMA	Kingston Metropolitan Area
NEPA	National Environment and Planning Agency
PIOJ	Planning Institute of Jamaica

## 7.4 Appendix 4 – References

- Beckford, Carole. (2007). *Keeping Jamaica's Sport on Track*. Pear Tree Press, Kingston.
- Brown, Hilary. (2004). *National Strategy & Action Plan to Further Develop the Jamaican Music Industry*. Prepared for the Ministry of Education, Youth and Culture, Jamaica, and UNESCO Global Alliance Programme, New York.
- Davis, Andrea M. (2001). *Revised Entertainment Sector Policy Paper*. Ministry of Tourism and Sport, Kingston.
- James, Vanus. (2001). *The Caribbean Music Industry Database (CMID), 2000*. Prepared for UNCTAD and WIPO, Geneva.
- James, Vanus. (June 7, 2007). *Contribution of Copyright and Related Rights Industries to the National Economy of Jamaica*. Draft Report. Submitted to World Intellectual Property Organisation. Mona School of Business, UWI.
- Markusen, Ann and King, David. (2003). *The Artistic Dividend: The Arts' Hidden Contributions to Regional Development*. Humphrey Institute of Public Affairs, University of Minnesota, Minneapolis.
- Ministry of Education, Youth and Culture (MOEYC). (2003). *The National Cultural Policy of Jamaica: Towards Jamaica the Cultural Superstate*. Culture Division, MOEYC, Kingston.
- Ministry of Education, Youth and Culture (MOEYC). (2003). *The National Cultural Policy of Jamaica: Towards Jamaica the Cultural Superstate – Action Plan*. Culture Division, MOEYC, Kingston.
- Ministry of Local Government, Community Development and Sport (MLGCDS). (1994). *National Sports Policy*. MLGCDS, Kingston.
- Nurse, Keith et al. (2006). *The Cultural Industries in CARICOM: Trade and Development Challenges (Draft)*. Prepared for the Caribbean Regional Negotiating Machinery, Barbados and EU PROINVEST, Brussels.
- Planning Institute of Jamaica (PIOJ). *Economic and Social Survey Jamaica*. Annual. Kingston, Jamaica.
- Stanbury, Lloyd. (2006). *Mapping the Creative Industries - The Experience of Jamaica*. Prepared for WIPO-CARICOM Meeting of Experts on the Creative Industries and Intellectual Property, Georgetown, Guyana, February 8 - 9, 2006.
- Witter, Michael. (2002). *Music and the Jamaican Economy*. UNCTAD, New York.

## 7.5 Appendix 5 – Creative Industries and Sport – Summary of Main Stakeholders

Stakeholders	Roles and Functions Relevant to Creative Industries and Sport
<b>GOVERNMENT</b>	
Office of the Prime Minister (OPM)	<ul style="list-style-type: none"> <li>• Responsibility for setting national policy on sport</li> <li>• Oversight of agencies involved in development of sport</li> </ul>
Ministry of Tourism, Entertainment and Culture (MTEC)	<ul style="list-style-type: none"> <li>• Responsibility for setting national policy on creative industries and tourism</li> <li>• Oversight of agencies involved in development of creative industries</li> </ul>
Ministry of Finance and Planning (MFP)	<ul style="list-style-type: none"> <li>• Responsibility for GOJ fiscal and monetary policies</li> <li>• Overall responsibility for budgeting for public sector</li> </ul>
African Caribbean Institute	<ul style="list-style-type: none"> <li>• Institution devoted to studying the African retentions in Jamaica’s oral, written and material culture and located in the same building as the National Gallery</li> </ul>
Broadcasting Commission	<ul style="list-style-type: none"> <li>• Statutory body established in 1986 to monitor and regulate the electronic media, broadcast radio and television, and subscriber television in the interests of consumers, the industries and the creative community</li> </ul>
Culture, Health, Arts, Sports and Education (CHASE) Fund	<ul style="list-style-type: none"> <li>• Established in 2003 to distribute and administer monetary contributions from lottery companies to sports development (40%), early childhood education (25%), health (20%), and arts and culture (15%)</li> </ul>
Creative Production and Training Centre (CPTC)	<ul style="list-style-type: none"> <li>• Leading multi-media production and training complex offering services in production, training and cable TV to celebrate Caribbean cultural heritage and enhance the creative skills of Jamaicans</li> </ul>
Edna Manley College of the Visual and Performing Arts	<ul style="list-style-type: none"> <li>• Premier educational facility in Jamaica and the English-speaking Caribbean offering training and accredited programmes in the visual arts, dance and drama</li> </ul>
Institute of Jamaica	<ul style="list-style-type: none"> <li>• Significant cultural, artistic and scientific organisation established in 1879 which undertakes research, houses permanent collections of Jamaica’s flora and fauna, and mounts historical exhibitions</li> </ul>
Institute of Sports Limited	<ul style="list-style-type: none"> <li>• Main public sector agency with responsibility for the development of sport in Jamaica</li> </ul>
Jamaica Cultural Development Commission (JCDC)	<ul style="list-style-type: none"> <li>• Responsibility to develop and promote the creative talents and cultural expressions of the Jamaican people, preserve and sustain national cultural heritage, organise annual Independence celebrations and annual Festival of the Arts and other events of national significance</li> </ul>
Jamaica Trade and Invest (JAMPRO)	<ul style="list-style-type: none"> <li>• Main agency responsible for promotion and facilitation of trade and investment opportunities in Jamaica including creative and sports-related industries</li> </ul>

Jamaica Intellectual Property Organization (JIPO)	<ul style="list-style-type: none"> <li>• Primary agency with responsibility for matters relating to intellectual property rights in Jamaica including registration of trademarks, geographical indications and industrial designs, administration of copyright and related rights, and the administration of the patent system</li> </ul>
Jamaica National Heritage Trust	<ul style="list-style-type: none"> <li>• Primary organisation with responsibility for promoting and sustaining Jamaica's material cultural heritage</li> </ul>
National Gallery of Jamaica	<ul style="list-style-type: none"> <li>• Premier collection of Jamaican historical and contemporary art</li> </ul>
Planning Institute of Jamaica (PIOJ)	<ul style="list-style-type: none"> <li>• Technical analysis in support of economic and social development</li> <li>• Co-ordination and management of funding development assistance projects</li> </ul>
Sports Development Foundation	<ul style="list-style-type: none"> <li>• Original fund established to receive percentage of proceeds of first lottery company, which now channels funds from CHASE to the benefit of various sporting interventions</li> </ul>
<b>PRIVATE SECTOR</b>	
Jamaica Federation of Musicians & Affiliated Artistes Union	<ul style="list-style-type: none"> <li>• 40 year-old trade union which represents singers and musicians in Jamaica</li> </ul>
Other Industry Associations Representing Performers	<ul style="list-style-type: none"> <li>• Including Jamaica Association of Vintage Artistes and Affiliates (JAVA), Jamaica Association of Dramatic Artists (JADA), the Jamaica Association of Female Artists (JAFA), the Jamaica Songwriters Guild</li> </ul>
Jamaica Association of Authors Composers and Publishers (JACAP)	<ul style="list-style-type: none"> <li>• Songwriters and music publishers copyright collection agency</li> </ul>
Jamaica Performers Administration Society (JPAS)	<ul style="list-style-type: none"> <li>• Collection agency established to represent the rights of musical performers as distinct from songwriters and music publishers</li> </ul>
Media Association of Jamaica	<ul style="list-style-type: none"> <li>• Association of media companies in Jamaica including print and broadcast media</li> </ul>
Recording Industry Association of Jamaica (RIAJam)	<ul style="list-style-type: none"> <li>• Members trade organization established to represent the interests of companies operating in Jamaica within the recording business, including music production, recording studio operations, music publishing, music video production, music distribution and manufacturing</li> </ul>
Other Industry Associations Representing Producers	<ul style="list-style-type: none"> <li>• Jamaica Film and Video Producers Association (JFVPA) and the Association of Independent Programme Providers are other associations which seek to represent the interests of producers for film, video, music and TV programmes</li> </ul>
Jamaica Anti-Piracy Alliance/JAPA	<ul style="list-style-type: none"> <li>• Formed in 2005 as partnership of JACAP, Jamaican Copyright Licensing Agency (JAMCOPY), RIAJam, Business Software Alliance (BSA), Sound System</li> </ul>

	Association of Jamaica (SSAJ), JADA, and 9 additional entities as Associate Partners.
Private Sector	<ul style="list-style-type: none"> <li>• Wide range of companies and individuals involved in various aspects of the creative industries and sport-related ventures</li> </ul>
<b>CIVIL SOCIETY</b>	
Maroon Councils	<ul style="list-style-type: none"> <li>• Traditional leadership structures of maroon communities in Jamaica including Moore Town, Charles Town, Scott's Hall and Accompong</li> </ul>
NGOs and CBOs	<ul style="list-style-type: none"> <li>• Include wide range of youth clubs, cultural groups, and sports clubs involved in various creative and sports activities</li> </ul>
Jamaica Amateur Athletic Association (JAAA)	<ul style="list-style-type: none"> <li>• Organization mandated to encourage, promote and develop athletics in Jamaica</li> </ul>
Inter-Secondary Schools Sports Association (ISSA)	<ul style="list-style-type: none"> <li>• Association founded in 1910 with mandate to facilitate the development of secondary school sports through competition including track and field, football, cricket, netball, swimming, table-tennis and hockey</li> </ul>
Jamaica Olympic Association	<ul style="list-style-type: none"> <li>• Represents Jamaica in the International Olympic Committee (IOC) and is responsible for organizing participation of Jamaica in Olympic Games</li> </ul>
Sporting Associations	<ul style="list-style-type: none"> <li>• Associations established to promote, manage and regulate specific sports in Jamaica, including the Jamaica Football Federation (JFF), Jamaica Cricket Association, Jamaica Netball Association and many others</li> </ul>
International Development Partners (IDPs)	<ul style="list-style-type: none"> <li>• Provide funding and technical assistance for implementation of projects related to the creative industries and sport</li> </ul>