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ANNEX 1
SITUATION ANALYSIS

Jamaica - Networks of Culture:
Summary Considerations of Jamaica's
Cultural and Creative Ecosystem

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Summary Considerations of Jamaica's
Cultural and Creative Ecosystem

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NETWORKS OF CULTURE: CONNECTING THE DOTS

The European Union (EU) has been a longstanding partner to Jamaica, formally and informally, whether seen in activities and programmes that encourage the promotion of cultural exchanges, trans-Atlantic artistic collaborations, the cross-fertilization of musical genres, or as partners in international networks and also in the trade of cultural and creative (CC) goods and services. Outside of added value elements related to trade, and outside of its relationships with the United Kingdom when it was within the EU, only a limited number of studies looking at stakeholder interaction of Jamaica's CC Ecosystem with EU stakeholders have been available. The CARIFORUM states gained market access through the EPA and accessing the Cultural Protocol. Post-2008 and the signing of the EPA, studies began to emerge on stakeholder interactions between CARIFORUM and the EU. This Action has been, as one of its specific activities, identifying EU stakeholders interested in collaborating with Jamaican cultural actors. It has sought to provide context, leveraging the parallel activities of this Action for understanding the pathways and the underlying conditions that are conducive or prohibitive to EU-Jamaica stakeholder exchange. This mapping exercise therefore seeks to establish cultural and creative stakeholder presence in Jamaica's Kingston, UNESCO Creative City of Music and the countries of the European Union, while establishing linkages and intersections across the cultural and creative ecosystems. It further seeks to establish ecosystem composition and intersections, and the added value that these ecosystems bring, with a view to making recommendations for policy. This has been accomplished primarily through qualitative research methods that include the articulation of a database of sources, case studies and thematic analytics[1] specific to Kingston, Jamaica, and a database of sources that enjoin EU and Jamaican cultural and creative activities.

THE ACTION

KINGSTON: NETWORKS OF CULTURE (K:NOC)

K:NOC is the specific application of the culturally-specific methodology, 'Networks of Culture' (NOC), to the cultural and creative environment of Kingston, Jamaica, or 'The Action'. NOC is a mapping methodology developed by Deborah Hickling Gordon of the University of the West Indies, Mona and DHG Consults in Jamaica; and Stefanie Thomas Gilbert-Roberts, a Jamaican consultant from CUMEDIAE aisbl in Brussels, Belgium.

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1 Deborah Hickling Gordon, Cultural Economy and Television in Jamaica and Ghana: #Decolonization2point0, S.L.: Palgrave Pivot, 2020, 156. Considering cultural specificity in policy planning is important because a nation's cultural and creative outputs are quite literally the outputs of their culture and cultures of innovation. By their very nature, many economies in the South have not achieved the same levels of industrialization and development as their Northern counterparts. Many continue to adopt and adapt the cookie-cutter cultural economy models and methodologies of the North instead of developing models that acknowledge fundamental differences in approach, cultural specificity and cultural circumstance.

It was designed specifically for the mapping of the cultural environments of countries of the Global South, particularly those where early stages of cultural policy and legislation continue to be contemplated, formulated and elaborated[2].

Kingston, the capital city of Jamaica and a Creative City of Music, was chosen as the pilot locale to test the design of a comprehensive mapping process that is required for all of Jamaica, to contribute to the process of cultural mapping there, and to demonstrate the added value of the creative ecosystem in Kingston. It is understood, therefore, that the mapping of Kingston's 'networks of culture' takes place within the contexts of the wider Jamaican society and economy. The Action known as Kingston: Networks of Culture, has been abbreviated as K:NOC. This Action is in keeping with the terms of reference of the EU service contract implemented by a consortium under the lead of the Goethe-Institut e.V., articulated by the Cultural Relations Platform (CRP) in October 2021.

K:NOC, the Action of this study, has sought to establish a baseline that highlights the scope, breadth, depth, and essence of the Cultural and Creative Ecosystem in Jamaica, and the presence of cultural and creative actors with an interest in collaborating with interested stakeholders in Europe.

JAMAICA: NETWORKS OF CULTURE (J:NOC)

ECOSYSTEM APPROACH TO CULTURAL AND CREATIVE MAPPING

Understanding the structures, components and workings of contemporary networks of culture requires the mapping of intersections within a specific locale, across themes, sectors, subsectors and industries, between institutions and enterprises, and amongst creative individuals and those who facilitate them. In this regard NOC takes an ecosystem approach to mapping cultural and creative activity, and likens networks of culture to an ecological system that consists of all organisms within a specific area and the physical environment with which they interact.

ON THE CC ECOSYSTEM:
"...opportunities to involve other portfolios and sectors, such as trade, labour, education, innovation, welfare, health, industry or environment, and make progress towards the SDGs to which they are linked. Parties offer numerous examples of varied pathways to designing, developing and implementing integrated policies that respond to the cultural and operating environments in which they will be delivered. Such policies tend to address particular domains, sectors or issues, and may also be connected to other narratives and policy priorities, such as cultural rights, education, economic development or social cohesion".

Magdalena Moreno Mujica, "Building Resilient and Sustainable Cultural and Creative Sectors" In *Re-Shaping Cultural Policies for Creativity*, UNESCO, 2022.

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[2]The NOC Research is based on six principles. These are culturally-specific research design: developing a methodology specific to the locale of study; praxis, which balances philosophical underpinnings and practical mechanisms; an ecosystem approach, which examines an integrated cultural and creative environment within the locale; synthesis, a focus on the culturally-specific balance of inclusive economic growth & sustainable development; inclusivity, the promotion of financial, economic, social, cultural, philosophical inclusion and equality of access; and representation, through the promotion of decent work imperatives, diversity, rights and freedoms. See methodology for application.

The ecosystem approach was influenced by the twentieth century conceptualization of an ecology of Jamaican cultural action through the 1970s mapping of Jamaican "State Instruments of Cultural Action."[3] The study examined the reach of three Jamaican cultural institutions into Jamaican society. Its author, Rex Nettleford presented an ecology of Jamaican cultural action by illustrating early Jamaican networks of cultural activity, their interface with, and impact on Jamaican life. This can be counted amongst the earliest mapping exercises for the Jamaican cultural ecosystem.

Nettleford speaks of cultural policy as "...a dimension of national development strategy." He argues, culture is 'of' its peoples. The natural ecosystem of cultures and policy development, to enable, it should reflect the "complex process of transformation through adjustments, rejection, affirmation and innovation." Nettleford's perspectives reflect the core philosophy of Networks of Culture as a research action, as a mapping methodology, and as a concept and descriptor of cultural action in the Global South.

The concept of an ecosystem provides the clearest picture of the workings of complex, modern, intersecting networks of culture. Mapping these networks requires the deconstruction of multiple elements by spatial unit, economic unit, theme, participant and activity. It then requires the reconstruction, analysis and representation of the ecosystem. This approach is necessary as, "the once linear cultural value chain has been transformed into an interconnected network model by the rise of digital technologies. Each node of the chain – creation, production, distribution and access – along with their interconnections and digital implications, must now be considered in the development of policies and regulatory frameworks (whether sector- or issue based).[4]"

Establishing and describing the cultural and creative ecosystem of the Caribbean Island of Jamaica requires an understanding of its contexts.

Jamaica's Cultural and Creative Ecosystem

Jamaica is the largest English-speaking island in the Caribbean, which spans approximately 1 million hectares and is classified as a highly indebted middle income country which has graduated to the status of upper middle income country after several years of straddling the lower/upper middle income threshold.

In a formal sense, a lack of clarity persists surrounding the structures and designations of Jamaica's cultural and creative ecosystem in which cultural and creative activity, production, trade and service delivery, and asymmetrical growth between national sectors take place. However, there has been an increasing interest

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3Rex Nettleford, Caribbean Cultural Identity, Kingston: Ian Rand Publishers, 2003, 55.
This early study evaluated the structure and reach of two Jamaican cultural institutions: the Institute of Jamaica, formed in 1879 by the colonial government for the encouragement of literature, science and art in the country, and the Jamaica Cultural Development Commission, formed in 1963 as part of the earliest cultural policy actions for independent Jamaica. The twentieth century study also examined the "Network of Voluntary Contribution to Cultural Action in Jamaica in the 1970s."
4Magdalena Moreno Mujica, "Building Resilient and Sustainable Cultural and Creative Sectors" In Re-Shaping Cultural Policies for Creativity, UNESCO, 2022, 44.

in the economic analysis of Jamaica's systems of production, distribution and the consumption of cultural goods and services in relation to their social, economic and political contexts, or cultural economy. This has been with a view to solidifying a formalisation process for this emerging sector of the economy.

The mapping process commissioned by the Jamaica Business Development Corporation, and carried out by the British firm Nordicity[5], is the third of three previously completed mapping processes undertaken in the new Millennium for Jamaica[6].

Population by Parish 2011 - Total Population at Dec, 31 2011 - 2,709,291
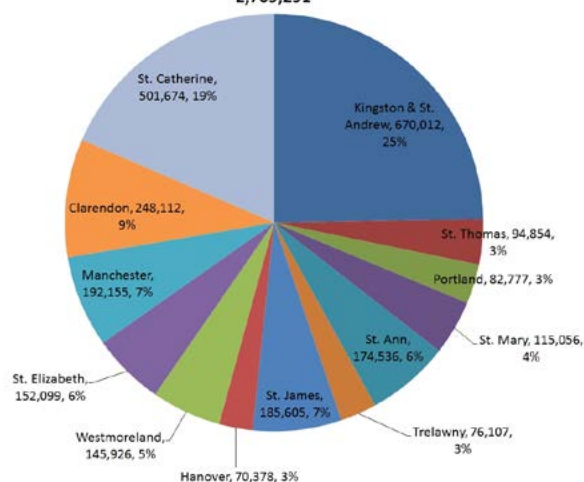
Nordicity attributes to UNESCO its declaration that Jamaica's cultural and creative industries' (CCIs) are estimated to contribute 5.2% of the country's GDP, generating revenues of JMD $2.2 billion annually, and accounting for 3% of total employment. It also found that Jamaica ranks 72nd in global creativity, and "on the creative output sub-index, Jamaica ranked 42nd, outperforming its neighbours Mexico, Costa Rica and Panama.[7]"

While the scope and scale of this mapping project does not allow for it, a targeted mapping exercise, along with economic and social impact assessments are required for all of Jamaica for a clearer understanding of the contribution of these activities to the social and economic metrics. Mapping Jamaica's cultural and creative ecosystem requires the implementation of culturally-specific mapping methodologies, such as the NOC methodology, across Jamaica's 3 counties, 14 parishes, 3 cities, 63 constituencies, 227parish council divisions and 775 communities.

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5 Nordicity, "Mapping Jamaica's Cultural and Creative Industries," British Council and Jamaica Business Development Commission, 2020.
6The first was the "Creative Industries Development Plan for Jamaica" commissioned by Jamaica Trade and Invest (now JAMPRO), completed by consultancy firm DPM International in 2006/2007 and the second was completed for a European Union Public Sector Development Programme (PSDP) in 2007.
7 Nordicity, "Mapping Jamaica's Cultural and Creative Industries," p 6.

MAPPING THE CC ECOSYSTEM

MAPPING PEOPLE, PROCESSES AND POLICY

Mapping processes for Jamaica must balance two sets of contradictory variables—the need for a culturally-specific process of research indigenization with the need for global statistical matching and harmonisation, and balancing an emphasis on intervention processes for stakeholder, sector and subsector development with an emphasis on technical policy development for the CC ecosystem. Jamaica's protracted CC policy reform process remains at the stage where, at the turn of the twentieth century, the developed nations of the world undertook processes to formalise, legitimise and optimise cultural and creative inputs and outputs as part of their economies. Many began those processes by mapping the existing ecosystems[8]. Through this means, global mapping documents recorded economic value added, labour statistics, demographic breakdowns and other useful data sets that public servants, in tandem with advocates in the cultural and creative environments, used to conceptualise, design and plan policy, legislation and programmes for the development of the cultural and creative industries. The publication of the UNESCO Convention on the Diversity of Cultural Expressions in 2006 focused the creative and cultural industries/economy policy directions on sustainable development imperatives, insisting that they be considered as part of the valuation processes for cultural and creative activities. This provided a framework for a balanced outlook that influenced policy development for the next fifteen years. This policy development further provided a framework for planning; planning, in turn, provides a rubric for implementation, monitoring and evaluation. The implementation of planned, transparent programmes for ecosystem development in keeping with evidence-based, data-driven enabling imperatives to address specifically identified challenges, completes the circle of action. That process begins with mapping people, processes and policy.

This mapping project sought to determine the status of the artist, the infrastructure available to them and their infrastructure needs, and the status of policy. It begins with the assertion that establishing uniformity in units of analysis will allow for the furtherance of its processes. The foundation for this lies in the articulation of CC policy and a Master Plan for development. For the comprehensive statistical classification of the economic units of the Jamaican cultural and creative ecosystem, it requires establishment as a streamlined economic sector in its national accounts; and for the very definition of the sector, the laborious process of naming, defining, streamlining sector inclusion and the standardisation of units of analysis are necessary for completion. This also allows for the identification and analysis of what NOC calls 'stakeholders' presence', and an understanding of the 'ecosystem composition' with all its intersections. The calculation and then summation or gestalt of these, ultimately, translate to added value for the ecosystem. These units should, ostensibly, be identified as a part of a national policy that establishes these focal points for the cultural and creative ecosystem.

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8 Terry Flew, The Creative Industries: Culture and Policy, Los Angeles: Sage, 2012, 9.

MAPPING CONTRADICTIONS AND NUANCE IN CC ECOSYSTEMS

In the Caribbean, mapping exercises have been completed in Trinidad[9], Barbados[10], St Lucia[11], and several other countries across the Caribbean. Jamaica has engaged in the processes of developing policy and economic and statistical systems for the production, distribution and consumption of cultural goods and services in relation to their social, economic and political contexts, or their cultural economy.

Balance is also required in the value systems associated with mapping. The 2003 Cultural Policy drafters recognized that a significant challenge that Jamaica faced was the "tension between cultural practices or expression that form a natural base for the social and spiritual order of their community and the translation of that knowledge/expression into tools/goods/services/products for economic power and development.[12]" To address this, the drafters sought to "develop strategies and mechanisms that would harness the elements of our cultural expression into meaningful, organised, systematic activities geared at the economic advancement of the entire community. When achieved, this will produce a widening of the scope for employment, a residual effect of pride and confidence in the community, and redound to the promotion of social wellness and prosperity.[13]"

The general tenets of the 2003 Cultural Policy continue to hold true with regards to what it referred to then as "Culture Industries:[14]"

- *15:5 In most developing societies where there is emphasis on traditional industries like sugar, banana and bauxite, cultural industries have largely been undervalued or ignored. Music and dance, though among the strongest areas of cultural activity in this regard, are relegated to school "breaking-up" or light entertainment for after work recreation. The reality of the massive cultural industries in developed societies has not propelled us to invest in our own, yet Jamaica the Cultural Superstate has the potential to rival any of the cultural industries of the world as our cultural content/product is definitely world-class. Our Music Industry ranks among the leading Entertainment industries of the world yet it is still largely under-invested and the country is not earning even near its potential.*

- *15.6: In a struggling economy like ours with the decline in traditional industries, there is greater urgency to invest in cultural industries as a viable alternative. Culture Industries, especially Music, are directly related to empowerment possibilities for our young people, especially young men, and offer real opportunities for employment and wealth creation.*

- *15.7: Further to the development of cultural industries is the need to foster and promote entrepreneurship within the wider community. This is directly related to the systematic facilitating of high levels of exportation and self sustenance/self-reliance through the empowerment of our people*

9 Suzanne Burke, "Culturing Development: The Dynamic Significance of the Arts and Cultural Industries: Mapping Exercise of Trinidad and Tobago's Arts & Cultural Industry Sector," The Management and Policy Institute, 2015, http://www.culture.gov.tt/wp-content/uploads/2015/01/IereMapping.pdf.

10 Annalee Babb, "Creative Truth to Power: Mapping of Barbados' Cultural and Creative Industries," 2017.

11 'Creative Industries Strategy & Action Plan for Saint Lucia', 2016, http://www.sice.oas.org/SME_CH/LCA/Creative_Industries_Action_Plan_LCA_e.pdf

12 Ministry of Education Youth and Culture; Culture Division, 'National Cultural Policy of Jamaica: Towards Jamaica the Cultural Superstate', 2003, 29.

13 Ministry of Education Youth and Culture, 'National Cultural Policy', 29.

14 Ministry of Education Youth and Culture, 'National Cultural Policy', 30.

toward self-employment, income generating activities, inventing and manufacturing, which are the goals of entrepreneurship. Our history is replete with this entrepreneurship as seen, for example, in the creation of free villages after emancipation. There is a need to recognize and evaluate the entrepreneurial spirit and systems that have caused us to survive and excel and convert them into institutionalised processes of action.

As the Jamaican policy process moved towards actualization, and having processed through two decades of globalisation and liberalisation, several of the contexts within which the 2003 policy had been grounded were changing rapidly. Thus, a targeted approach to updating the 2003 policy began in 2014. Research supporting this process presented fragmentation and siloed policy efforts as the major challenges.

Mapping ecosystems is an important global research and evaluation tool that will assist in this process. It presents a means of delineating and describing economic, social and political datasets related to cultural and creative activity; ecosystem composition, stakeholders' presence and intersections are identified to assist in the process of developing data-driven and evidence-based policy to advance the development of the cultural and creative sectors and establish a sense of the added value these sectors bring to national economies. This has required naming, defining and formalising a broad sector, as well as the identification, inclusion, and classification of subsectors.

A nation's cultural and creative industries nomenclature, definition and sub-sector inclusion is an ideological, political economy snapshot in a place in time:

"Those industries that have their origin in individual creativity, skill and talent, and which have the common element of selling or otherwise profiting from creative works or services provided by creative actors and or individual creative and skill".

Gillian Wilkinson McDaniel et al, *'Understanding the Creative Economy and the Way Forward: Jamaica's Entertainment, Cultural and Creative Industries: A Case for the Entertainment Industry,'* Ministry of Culture, Gender, Entertainment and Sport, 2021.

ECOSYSTEM COMPOSITION, STAKEHOLDERS' PRESENCE AND INTERSECTIONS

NOC can be identified as the fourth mapping activity in Jamaica related to CC development in the 21st century. In using an ecosystem approach, it foregrounds the informality and fluidity of the cultural and creative ecosystem. Accounting for the 'composition' of **stakeholders' presence,** therefore, requires the identification of units of analysis within which those involved in the CCI, including people, organisations, practices and activities, can ultimately be identified and classified, highlighting informality as a significant feature of the sector. The situation analysis therefore engages with the process of mapping, the classification systems, and governance structures to establish a baseline and framework within which an expanded mapping process can be completed.

Using the Nordicity mapping data as a baseline, **this study describes the elements of the Jamaican CC ecosystem and how these are composed and related.** It makes the case that contemporary national policy is required to **name and define** the scope of the cultural and creative ecosystem and economy, in keeping with both global and local culturally-specific standards, circumstances and meanings. This mapping study

further **identifies the subsectors** included in Jamaica's cultural and creative ecosystem and proposes ways in which it can **classify these units of analysis** for the purposes of mapping as an interim measure until formal, national classifications are proposed within a holistic policy framework in the future.

JAMAICAN CULTURAL & CREATIVE SUBSECTORS (DECEMBER 2021)

1. Architecture
2. Artisanship
3. Audiovisual
4. Culinary
5. Craft
6. Design
7. Digital
8. Festivals, Events, Entertainment + Production
9. Fashion
10. Folk and Faith Based
11. Heritage, Cultural + Creative Tourism
12. Integrated Marketing Communication
13. Intermediaries
14. Music
15. Visual Arts
16. Performing Arts
17. Publishing
18. Research and Innovation
19. Sport
20. Toys and Games

Creatives' Presence; Ecosystem Composition and Intersections

NOC identified twenty subsectors included in Jamaica's cultural and creative ecosystem. The study articulated, described and classified the '**presence**' of stakeholder categories within the ecosystem. This term was coined in keeping with the significant informality within the sector. NOC observed that individual stakeholders within the ecosystem operate across sectors, projects, through various companies, institutions and informal associations. Identifying the presence of stakeholders (individuals or entities) allowed for the conceptualization of ways to account for their added value across myriad activities.

Ecosystem '**Composition**' refers to its process of naming, defining and articulating the components of the cultural and creative ecosystem in keeping with the global and culture-specific standards and meanings, and the relationships between units of analysis; '**Intersections**' refers to linkages, inter and intra sector and subsector relationships that contribute additional value to the CC ecosystem. These preliminary descriptions were used to develop specific classification units for the mapping study. These, in turn, allow for determinations of qualitative and quantitative 'value added' and require clear articulation of nomenclature, definitions, sector Inclusion, governance structures and classifications for the CC.

Nomenclature, Definitions, Sector Inclusion, Governance Structures and Classification

In Jamaica, cultural and creative creation, production, distribution and consumption occur through a wide range of value creating entities[15]. Several terms, names, descriptors and meanings [16]are used concurrently and interchangeably to describe the "terminological clutter" of the cultural and creative industries and the associated economic concepts used globally[17]. Cultural, creative and recreational activities are referred to across Jamaican policy, publications and oral articulation as 'cultural industries,' 'creative industries,' 'cultural and creative industries' and 'entertainment'.

Naming, defining and identifying subsectors for inclusion are intersecting processes that have been globally accepted as a means of articulating the role of culture, creativity and its derivatives in its economic and sustainable development advancement. Nomenclature, definitional and subsector inclusion choices demonstrate the balance of emphases and the weighting of economic growth and sustainable development as central policy strategies.

Across the globe[18], the understanding is that naming, defining and sub-sector inclusion activities of the sector requires the interrogation of distinctions between cultural industries and creative industries[19] in regional[20] and global policy discourse.

15Jamaica Promotions Corporation (JAMPRO), 'National Export Strategy', 2021, 89-93. chains See National Export Strategy for the articulation of value chains of music, dance, drama entertainment and film.

16 Nordicity, 'Mapping Jamaica's Cultural and Creative Industries', 18; Gillian Wilkinson McDaniel et al., 'Understanding the Creative Economy and the Way Forward: Jamaica's Entertainment, Cultural and Creative Industries: A Case for the Entertainment Industry,' Ministry of Culture, Gender, Entertainment and Sport, 2020. Nordicity identified music, literature and publishing, the visual arts, design, gifts and crafts, film, television and broadcast, digital media, advertising and marketing, theatre, dance and performing arts, fashion, culinary/gastronomy, museums, galleries and libraries, and cultural heritage as the focal CCIs for its study. It also presented the 'cultural and creative industries definition framework' for the Ministry of Culture, encompassing gender, entertainment and sports' as music, the entertainment industry, publishing & literary; architecture & design; art, craft, antiques & fine arts; audio-visual, him (sic), video; media arts, animation; broadcasting, advertising; performing arts, theatre; fashion, fashion industry culinary/gastronomy; sports; and tools of trade.

The Ministry's 'Focus on Entertainment' articulated the 'entertainment industries' as music, visual and performing arts; film; sport; publishing; digital media; events, festivals and nightlife; fashion; and gastronomy.

17 John Hartley, Creative Industries, Malden, MA: Blackwell Publishing, 2005, 115.

Early CCI thought spoke of the challenges of nomenclature, an issue that has remained relevant and consistent over time. The terms 'content industries' and 'copyright industries', also came to be used by analysts who favour the prioritisation of production (copyright) and commodity (content). The concept 'creative industries' and its derivatives 'cultural industries' 'content industries', 'copyright industries', 'entertainment' and later 'Cultural and Creative Industries' came to be used in Jamaica in the 21st century and were used interchangeably by policy makers and practitioners, although scarcely understood.

Galloway and Dunlop, Deconstructing the concept of 'Creative Industries' In Cultural Industries: The British Experience in International Perspective, 2006, spoke of "Terminological Clutter."

18 David Hesmondhalgh, The Cultural Industries, SAGE Publications, 2007; DeBeukelaer and Spence, Global Cultural Economy, Cambridge, Routledge, 2019. Hesmondhalgh defines cultural industries as those industries primarily involved in the mass production, circulation and consumption of symbolic texts. In 2020, DeBeukelaer and Spence, in rationalising CC nomenclature-use, argue against the use of a 'cultural ecology' metaphor, choosing the specificity of 'Cultural Economy."

19 Creative industries are defined as cycles of creation, production and distribution of goods and services that use creativity and intellectual capital as primary inputs. Knowledge based activities producing tangible goods and intangible intellectual of artistic services with creative content, economic value and market objectives. (UNCTAD, UNDP)

20 PJ Patterson, "Leveraging CARICOM's Human, Cultural and Natural Assets for the Economic Development of the Community," Twenty-sixth Inter-sessional Meeting of the Conference of Heads of Government of the Caribbean Community, Nassau, The Bahamas, CARICOM, 2015, 3.

In 2015, the paper titled "Leveraging CARICOM's Human, Cultural and Natural Assets for the Economic Development of the Community" was prepared in response to a request from the Chairman of the Conference, Rt. Hon. Perry Christie, Prime Minister of the Bahamas, to engage Heads of Government at the Twenty-Sixth Inter-Sessional Meeting of the Conference in a discussion on this matter. CARICOM defines cultural industries as core copyright industries, including traditional art forms e.g., performance, literary and visual arts. Creative Industries are defined as applied arts: e.g., advertising, design, publishing, and audiovisual media with copyrightable elements.

Making appropriate, culturally-specific choices for the naming of a nation's cultural and creative creation, production, distribution and consumption has a direct bearing on the economic classification of the sector and identification of its sectoral and statistical units. It is a preliminary process in the development of conceptual, policy and economic models for a nation's cultural and creative ecosystem and planning for its cultural economy.

Understanding Creativity: The Concentric Circles Model (building on David Throsby's work) (Throsby 2007, 2008)
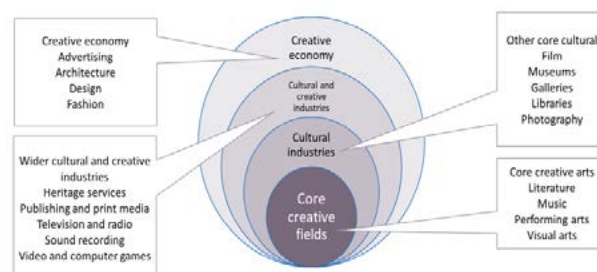
Mapping Nomenclature

The following are nomenclature used within the region

CARICOM: Cultural and Creative Industries

> "*Entertainment as it pertains to the tourism sector, includes a multitude of activities geared towards providing visitors with a wide variety of opportunities to interact socially during their travel experience*" …Sports tourism is described as a "niche market" that includes sporting events and offshore training.
>
> Ministry of Tourism, 'Tourism Networks Policy,' 2020, 20.

CARICOM[21] addressed the issue of Member States defining cultural/creative industries in its 2015 Patterson Position Paper on leveraging cultural and creative industries for regional development[22]. Following the ratification of the paper by the CARICOM Heads of Government at their 26th meeting and subsequent implementation by the Community and its Member States, the term 'Cultural and Creative Industries' came into popular use in the region and evolved into the preferred nomenclature that is currently in use in most Member States.

21The Caribbean Community (CARICOM) is the Caribbean's Regional Organisation. It is a grouping of twenty countries: fifteen Member States and five Associate Members. It is home to approximately sixteen million citizens, 60% of whom are under the age of 30, and come from the main ethnic groups of: indigenous peoples, Africans, Indians, Europeans, Chinese, Portuguese and Javanese.

22In Patterson's "Leveraging" (2015), the general issue had previously been raised by the Most Hon. P.J. Patterson, former Prime Minister of Jamaica, in an address to the 19th Annual Multi-national Business Conference held in The Bahamas on 7 November 2014. This prompted its inclusion on the agenda for a discussion, at the political heads level, as it was seen to be "at the heart of what CARICOM could and should be doing." This paper presented a regional position on the matter that guided several local cultural policy decisions of the Member States. It also provided a framework of activities that have been—and continue to be—implemented by CARICOM, Regional Agencies, and the Member States

Ministry of Culture, Gender Entertainment and Sport: Entertainment, Cultural and Creative Industries

Jamaica's Ministry of Culture, Gender, Entertainment and Sport (MCGES[23]) chose "Entertainment, Cultural and Creative Industries" (ECCI)[24] as the overarching nomenclature for the sector/industries. In 2020, a proposed definition for 'entertainment' has been proffered by the MCGES[25]. The ECCI is further defined through the COVID-19 Recovery Task Force and explains the inclusion of 'entertainment' in its nomenclature. The current moniker used by the Ministry describes the set of cultural and creative activities identified as 'industries', as opposed to the Nordicity framing of subsectors.

These are listed and classified as Music, Visual and Performing Arts, Film, Sport, Publishing, Digital Media, Events, Festivals and Nightlife, Fashion, and Gastronomy[26].

Jamaica Business Development Corporation | NORDICITY: Cultural and Creative Industries

The 2021 Nordicity/JBDC[27] Mapping Document[28] chose "cultural and creative industries" (CCI) as its nomenclature for the Jamaican mapping context. The study approached the process of defining Jamaica's CCI through the identification of its various components, stakeholders and activities as units of analysis. The study further classified its sub-sector inclusions as Music, Literature & Publishing, Visual Arts, Design, Gifts & Crafts, Film, Television & Broadcast, Digital Media, Advertising & Marketing, Theatre, Dance & Performing Arts, Fashion, Culinary/Gastronomy, Museums, Galleries & Libraries and Cultural Heritage. No overarching, culturally-specific or guiding definition for Jamaica's "cultural and creative industries" was offered.

JAMPRO: Creative Industries

The Jamaica Promotions (JAMPRO), an agency of the Ministry of Industry, Investment and Commerce, refers to the nomenclature 'Creative Industries'. JAMPRO promotes, among other things, investment opportunities in three disciplines: film, animation and music. The Agency is guided by the National Export Strategy (NES) which lists 'entertainment' as one of eight industries for prioritisation. The NES further identifies Dance, Drama, Film and Music among "the strongest export services" of the 'Creative Industries'. The NES treats 'Entertainment' as a separate priority industry from 'Fashion, Jewellery and Accessories' and from Information Communications Technology (ICT).

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23 MCGES is the ministerial Subject-holder for "Cultural and Creative Industries." It is assigned, through the Cabinet Office, the policy development and administration responsibilities for the portfolios of Culture, Entertainment and Sport.
24 Babsy Grange, "2021/22 Sectoral Debate Contribution," In-person (June 8, 2021), https://jis.gov.jm/speeches/2021-22-sectoral-debate-contribution-by-the-honourable-olivia-grange-cd-mp-minister-of-culture-gender-entertainment-and-sport-on-8-june-2021/.
25 Wilkinson McDaniel et al., "Understanding the Creative Economy," 2020.
26 Nordicity, 'Mapping Jamaica's Cultural and Creative Industries', 18.
27 The Jamaica Business Development Corporation (JBDC) is an agency of the Ministry of Industry, Investment and Commerce
28 The mapping study and situational analysis of Jamaica's cultural and creative industries (CCIs), commissioned by the Jamaica Business Development Corporation (JBDC) was undertaken in 2021.

Ministry of Tourism: Sports and Entertainment

The Tourism Networks Policy and Strategy[29] addressed "Sports and Entertainment" as a "single Network" of the tourism sector. 'Sports and Entertainment' were identified as one of five networks[30] that form the pillars of tourism economic growth. The umbrella plan that guides the development of the tourism sector, the Tourism Master Plan[31] lists "entertainment" as a "sector," an "ancillary sector" and a "sub-sector" of the tourism industry. In this report, 'Entertainment' was listed as the second largest 'sector' of the tourism industry, after accommodation. It included tour operators, sports and recreation and activities, but excluded nightclubs, which were listed under food and beverage. Additionally, 'attractions,'[32] which included heritage as a 'sector,' was presented separately from 'entertainment and sports'.

> *"Entertainment as it pertains to the tourism sector, includes a multitude of activities geared towards providing visitors with a wide variety of opportunities to interact socially during their travel experience"* …Sports tourism is described as a "niche market" that includes sporting events and offshore training.
>
> Ministry of Tourism, 'Tourism Networks Policy,' 2020, 20.

NOMENCLATURE MAP JAMAICAN CULTURAL AND CREATIVE SECTOR	
CARICOM	Cultural and Creative Industries
Ministry of Culture, Gender Entertainment and Sport	Entertainment, Cultural and Creative Industries
Ministry of Tourism	Sports and Entertainment
Ministry of Industry Investment and Commerce: • Jamaica Business Development Corporation (Nordicity) • JAMPRO • MSME Policy	• Cultural and Creative Industries • Creative Industries (Focus on Film, Animation and Music - FAM) • Creative Industries
Ministry of Foreign Affairs and Foreign Trade	Cultural and Creative Industries

29 Ministry of Tourism, 'Tourism Networks Policy and Strategy,' Government of Jamaica, 2020, https://www.mot.gov.jm/sites/default/files/public/tourism_networks_policy_and_strategy.pdf.
30 Networks in the context of tourism are characterised by the interaction between individuals or organizations with common interests and a commitment to shared goals that support innovation and competitiveness in Jamaica's tourism sector.
31 Commonwealth Secretariat, 'Master Plan for Sustainable Tourism Development Jamaica,' 2002, https://www.tpdco.org/wp-content/uploads/2016/07/Master-Plan-for-Sustainable-Tourism-Development.pdf.
32 Attractions were described as "Jamaica's excellent natural, cultural and heritage assets to distinguish the (tourism) product from the majority of its competitors."

Significance of Nomenclature Differences

The streamlining of the nomenclature associated with the sector across all-of government provides a basis for also directing the thinking about the role, purpose, ethos and design of Jamaica's ecosystem. From a policy perspective, the fragmentation of the sector identified across studies is represented by the differences in the naming of this sector across all-of-government. There are philosophical, ideological, economic and logistical differences in the meanings of 'cultural' and 'creative' activities in relation to this sector. The differences in naming belie the differences in thinking about cultural and creative activity across the government. There are also classification and sector inclusion parameters related to the name chosen. That is, the naming of the sector relates directly to the subsectors and industries it includes.

SECTOR DEFINITION JAMAICAN CULTURAL AND CREATIVE SECTOR	
Definitions and Proposed Definitions	**Cultural and Creative Industries** "Those industries which produce tangible or intangible artistic and creative outputs, and those industries that have their origin in individual creativity, skill, talent, potential for wealth creation and income generation through the production of and trade in cultural assets and knowledge based goods and services, both traditional and contemporary; and those sectors that produce goods and services which have a potential for wealth and job creation through the generation and trade of intellectual property." Deborah A Hickling, 'Creative Economy Policy Framework: Towards and Enabling Environment for the Sustainable Development of Thriving Cultural and Creative Industries', Inter-ministerial Task Force on Cultural and Creative Industries: NCCIC, 2015, 13. **Entertainment** "Those industries that have their origin in individual creativity, skill and talent, and which have the common element of selling or otherwise profiting from creative works or services provided by creative actors and or individual creative and skill." Wilkinson McDaniel et al, 'Understanding the Creative Economy', 2021. **Entertainment, Culture & Creative Industries ("ECCI")** The ECCI in Jamaica are described as industries anchored by intellectual property rights, having their origin in individual creativity, skill and talent, which have the common element of selling or otherwise profiting from creative works or services provided by creative actors and/or individual creativity and skill. Jamaica's Entertainment, Culture, and Creative Industries consists of a mix of formal and informal operators. Ministry of Finance and Public service, 'COVID-19 Economic Recovery Task Force Final Report', 2020, 11. https://mof.gov.jm/wp-content/uploads/Rebuild-Jamaica_-COVID-19-Economic-Recovery-Task-Force-Report-FINAL-1.pdf. **Entertainment, Culture & Creative Industries ("ECCI")** Those industries that have their origin in individual creativity, skill and talent, and which have the common element of selling or otherwise profiting from creative works or services provided by creative actors and or individual creativity and skill. Wilkinson McDaniel et al, "Understanding the Creative Economy", 2021.

Significance of Definition

The naming, defining, and sub-sector inclusion of cultural and creative activities have implications for, and are directly related to, the design of public sector governance structures for cultural and creative economy development. They provide a qualitative baseline from which policy design can purposefully emerge and provide a framework and guiding principles through which governance decisions can be formulated.

The streamlining of the nomenclature associated with the sector across all-of government provides a basis for developing a definition that guides policy development. Associated with the 'naming' of the sector are the identification, inclusion and prioritisation of CC sectors through policy. This further provides a compass for sector development. Several variations of these parameters are officially used across government.

SUBSECTOR INCLUSION AND CLASSIFICATION MAP JAMAICAN CULTURAL AND CREATIVE SECTOR				
	Jamaica Industrial Classifications - STATIN 2016	**Cultural and Creative Industries - MCGES 2021**	**Entertainment Industries MCGES 2021**	**Jamaica's Cultural and Creative Industries -JBDC / Nordicity (2021)**
Sector Inclusion and Classification of Economic Units industries	Creative Arts and Entertainment Activities; Libraries, Archives, Museums and other Cultural Activities; Gambling and Betting Activities; Sports Activities, Amusement and Recreation	Music, Entertainment Industry, Publishing & Literature; Architecture & Design; Art, Craft, Antiques & Fine Arts; Audio-Visual, Him (sic), Video; Media Arts, Animation; Broadcasting, Advertising; Performing Arts, Theatre; Fashion, Fashion Industry Culinary/Gastronomy Sports; Tools of Trade	Music, visual and Performing arts; Film; Sport; Publishing; Digital media; Events. festivals and nightlife; Fashion; Gastronomy.	Music Literature & Publishing Visual Arts; Design, Gifts & Crafts Film Television & Broadcast; Digital Media Advertising & Marketing; Theatre, Dance & Performing Arts Fashion; Culinary/ Gastronomy Museums, Galleries & Libraries; Cultural Heritage

The Jamaican nomenclature (ECCI) and various definitions of that name have been outlined in the post-COVID Report and publicly declared, including in Parliament. It is therefore considered to be a policy position of the government. However, it does not appear to be uniformly accepted and used across all-of-government and there is no clear indication as to how it serves to guide subsector inclusion, classification or guide broader policy imperatives and direction.

Mapping Cultural and Creative Public Sector Governance Structures

Jamaica's CC governance and administration exist across several Ministries, Departments and Agencies of government. The government of Jamaica (GOJ) uses a 'joined up model of governance' and principles

for the implementation of cultural and creative policy. From as early as 2003, the Jamaican draft Cultural Policy recognized the urgent need to address the fragmentation of cultural administration by parliamentary decree, seen by many as the most persistent challenge to cohesive and sustainable cultural development. It also pointed to the "lack of linkages and coordination among the agencies offering cultural programmes that currently exist."[33]

At its second workshop on policy modelling in January 2015, the Inter-ministerial Technical Working Group (ITWG)[34] proposed to the National Cultural and Creative Industries Commission (NCCIC)[35], that the joined-up government model be retained as a mechanism through which to transition Jamaica's cultural and creative policy provision to a new, holistic governance structure through an umbrella, all-encompassing GOJ policy structure and entity.

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33 Ministry of Education Youth and Culture; Culture Division, 'National Cultural Policy of Jamaica: Towards Jamaica the Cultural Superstate', 2003, 7, https://caricom.org/documents/11016-jamaica_cultural_policy.pdf.

34 The Inter-Ministerial Technical Working Group was a body that was designed and implemented in 2014 to provide inter-ministerial technical support to the National Cultural and Creative Industries Commission.

35 Hickling, 'Creative Economy Policy Framework', 2015; UNCTAD, "Creative Economy Report 2008: The Challenge of Assessing the Creative Economy Towards Informed Policy-Making." United Nations, 2008; Ministry of Youth, Sports and Culture, 'Positioning for Growth: Leading Social Transformation, Building the Creative Economy', 2010, 57, https://www.youthjamaica.com/sites/default/files/Sect_2010_D1_4.pdf; UNESCO, 'Quadrennial Periodic Report: The National Culture and Creative Industries Council (NCCIC)- Jamaica Creative', 2020, https://en.unesco.org/creativity/policy-monitoring-platform/national-culture-creative-0. The Current 'Jamaica Creative' is a clear example of continuous policy. 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 would seek to place Jamaica in a position to achieve developed country status by 2030. Development of the Plan began in January 2007 and thirty-one (31) Task Forces (TFs) including the Culture and Values and Creative Industries and Sport Task Forces were established thereafter. The TFs represent sectors and areas critical to the achievement of the national goals and were charged with the responsibility for developing the relevant long-term sector plans. The Culture and Values and Creative Industries and Sport Task Forces commenced the plan preparation exercise as separate Task Forces (Culture and Values Commenced in March 2007 while the Creative Industries and Sport commenced in April 2007). First drafts of Sector Plans for both Task Forces were produced and submitted in June 2007 and reviewed within and outside of the PIOJ in the last quarter of 2007. Late in 2007, both Task Forces recognized that the interrelationship between culture and values and the creative industries made it impractical to separate the plans for each of the areas. In consequence, it was adjudged that the best strategic approach to the development of Culture and Values and Creative Industries in Jamaica was to combine the efforts of both Task Forces into the development of a single sector plan. This led to the creation of the Culture, Creative Industries and Values Task Force and subsequently, the combination of the Culture, Creative Industries and Values (CCIV) Sector Plans into a single document, while the Sport Task Force was kept separate. One of the recommendations of the Vision 2030 process was the establishment of a Cultural and Creative Industries Council to consolidate the policy efforts in this area. The structure of the NCCIC was the brainchild of Lloyd Stanbury, Clyde McKenzie and Josanne Leonard, who in 2007 lobbied the Prime Minister to make it a national priority and one which she chaired to give weight to its mandate. They also emphasised the importance of an inclusive process in the formation of the inter-ministerial body that brought the disparate elements of government to the table with representatives of the various subsector groups. The formation of the NCCIC was announced by the prime minister in the 2006/2007 annual budget debates.

Following a change of administration in 2007, the Installation of a Culture and Creative Industries Council (CCIC) was once again announced. The CCIC "will be set up as an Inter-Ministerial one stop umbrella body to ensure greater coordination and dynamism within the management of the creative industries development programme. It will treat with marketing and distribution concerns, intellectual property and related rights issues, professionalisation and capacity building as well as administration of the use of Jamaica's national symbols."

When the administration changed again in 2012, establishing the body became a policy priority. The structure, composition and mandate were designed within the Office of the Prime Minister and approved by the Cabinet in 2014, with a view to the development of a culturally-specific and unique policy model for Jamaican Cultural industries, in keeping with policy modelling trends for cultural sectors worldwide and in view of establishing of a streamlined approach to converging the integrated and related portfolios affecting these industries, among others. Thus, the NCCIC was established and became operational in that year, supported by the ITWG, which produced a Creative Economy Policy Framework.

The NCCIC, began its mandate of providing a comprehensive, cross-cutting approach to the policy development process across the Ministries, departments and agencies of Government charged with elements of that responsibility. The NCCIC Unit was designed to provide a link between the Government and the Creative and Cultural Industries to develop stronger communication with stakeholders, facilitate partnerships, and to provide or source development opportunities for the members. It established a secretariat and successfully negotiated the posts of National Director and a team of other Policy, Research and Field Service Directors.

Following the 2015, change in administration along with a hiatus, the NCCIC was reactivated and staffed in 2018. The NCCIC was rebranded 'Jamaica Creative' and became operational as a full unit within the Cultural and Creative Industries Policy Division, led by a National Director and a team of other Policy, Research and Field Service Directors in 2021.

For Jamaica, a study commissioned by UNCTAD and WIPO in 2002 confirmed the importance of music as an important economic activity, a source of income-generation and trade opportunities. A key message conveyed by the report and that would be applicable in principle to the whole Caribbean region is that the industry has developed with little government assistance. A turning point occurred when the National Industrial Policy recognized music and entertainment as two key elements of the national development strategy. This debate progressed further when a National Strategy and Action Plan to develop the Jamaican music industry was prepared in 2004 for implementation through partnerships uniting the private sector, governments and international institutions. Debates evolved and in 2007, the Prime Minister announced that a new Cultural Industries Council would replace the existing Entertainment Advisory Board, recognizing that "cultural industries represent Jamaica's natural competitive advantage".

United Nations Conference on Trade and Development (UNCTAD), 'Creative Economy Report 2008: The Challenge of Assessing the Creative Economy towards Informed Policy-Making,' New York: United Nations, 2005, 54.

The Fleming Report indicated that the joined-up government approach was challenged by the absence of a clear and uniform "single voice" of leadership setting out the vision for the CCIs and orchestrating investment and delivery. This also means there is no accountability structure. Fleming also pointed to issues of "ownership" regarding different "overlapping parts" of the CCIs by different Ministries, which "distributes ownership and dilutes strategic impact." As such. Fleming argued that there was a "disconnect between persons in the industries and other stakeholders who "are not clear of how or whom to approach regarding CCI development and service matters"[36].

The NCCIC further proposed in 2015 to facilitate a transition from the existing governance structure of a joined-up government to a suitable governance structure, in keeping with the 21st century requirements of the cultural and creative ecosystem that the following actions be taken[37] in tandem with the Public Sector Transformation Unit:

"There is a wide range of government agencies addressing different needs – from entrepreneurship training and export permitting to regulation and inspection, and many more. There are as many as nine ministries and agencies with strong mandates and programmes for various parts of the CCIs. Best practices globally indicate the advent of "matrix management" whereby agencies with different mandates but each involved with different aspects of a CCI ecosystem need to collaborate. While no attempt was made to evaluate Jamaica's performance in that regard, there certainly is strong evidence of collaboration and respect for complementary institutions".

Nordicity, 'Mapping Jamaica's Cultural and Creative Industries', 50.

1. That a mapping exercise be completed by the GOJ of its current CCI governance structure with a view to designing an appropriate governance structure to advance the CCI process

36 Tom Fleming, 'Creative Industries Business Plan for Jamaica', 2016, 67.
37 Deborah A Hickling, 'Creative Economy Policy Framework: Towards and Enabling Environment for the Sustainable Development of Thriving Cultural and Creative Industries', Inter-ministerial Task Force on Cultural and Creative Industries: NCCIC, 2015, 44.

2. Rationalisation of public sector resources related to CCIs through the Public Sector:

   a. Mapping and rationalisation of related government-owned audio visual, performance and sporting facilities and infrastructure and their use/rationalisation in fostering growth in the sector

   b. Rationalisation of governance structures/entities to improve the efficiency and effectiveness of service delivery to stakeholders

   c. Rationalisation of human resources in CCIs across Ministries, Departments and Agencies— including the staffing and resourcing of the NCCIC Secretariat.

Jamaica has a parliamentary system of government headed by a Prime Minister who in turn chairs the principal policy making body, the Cabinet. The Cabinet is the centre of the system of government, which is responsible for its general direction and control. In addition to the Prime Minister, the body includes at least 11 other Ministers of Government. Each minister has the responsibility for a specific subject area, which determine the institutional administrative and governance structures through which policy is formulated and implemented, and the public services provided through Ministries, their departments and agencies (MDAs). In Jamaica, these subject areas, chosen at the discretion of the Prime Minister, have, in the 21st century, determined the governance structure and administration of the cultural and creative ecosystem. Jamaica's Cabinet Office Assignments identifies subject[38] assignments related to elements of the cultural and creative ecosystem to Ministries of Government[39]. At the end of January 2022 these were:

1. The **Office of the Prime Minister** administers the Information Portfolio with Cultural and Creative Ecosystem-related subjects: Access to Information Act, Archives, Broadcasting and Information. It also administers the CHASE Fund, which has responsibility for arts funding and financing as part of its mandate.

2. The **Ministry of Culture, Gender, Entertainment and Sport** (MCGES) has responsibility for nine subjects[40] including "Cultural and Creative Industries" (CCI). The CCI, as Subject in this Ministry, was further delineated and defined as Music, Entertainment Industry, Publishing & Literary; Architecture & Design; Art, Craft, Antiques & Fine Arts; Audio-Visual, Him, Video; Media Arts, Animation, Broadcasting, Advertising; Performing Arts, Theatre; Fashion, Fashion Industry; Culinary/Gastronomy; Sports; and Tools of Trade[41]. Other subjects assigned to this Ministry also are natural parts of—and have direct linkages to—the cultural and creative ecosystem, but are classified and assigned by the Cabinet as outside of the 'Cultural and Creative Industries' as a subject. These subjects include Entertainment, Heritage, National Commemorative Events, Publications (Legal Deposits), Reparations, Sport, Arts and Culture.

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38 Jamaica Office of the Cabinet, 'Assignment of Subjects and Departments, Agencies and Other Public Bodies,' 2022, 19, https://cabinet.gov.jm/wp-content/uploads/2022/01/GOJ-Assignment-of-Subjects-Departments-Agencies-26-January-2022.pdf.

39 K:NOC identifies the ministries of government with direct policy development responsibilities and subjects related to the global cultural and creative classifications assigned to them as the six primary cultural and creative ministries.

40 Office of the Cabinet, 'Subjects and Departments', 11.
The nine subject areas of the MCGES at January 2022 were Arts and Culture, Cultural and Creative Industries, Entertainment, Gender Affairs, Heritage, National Commemorative Events (Labour, Emancipation, Independence, National Heroes Days), Publications (Legal Deposits), Reparations, and Sport.

41 Nordicity, 'Mapping Jamaica's Cultural and Creative Industries', 18.

3. **The Ministry of Industry, Investment and Commerce** is the subject holder for Film and Motion Pictures, Copyright, and Marketing and Advertising.

3. Libraries are listed as subjects under the **Ministry of Education and Youth**

4. The **Ministry of Science, Energy and Technology** has responsibility for Information and Communication Technology and Telecommunications as subjects; there are other areas that global policy has enjoined under the umbrella of culture and creativity in an era of digitization and digitalization.

4. Casino Gaming is listed as a subject of Jamaica's **Ministry of Finance.** It is also classified by the JIC under 'Recreation'.

Six additional ministries have been identified as providing significant input in policy and service delivery for cultural and creative activities yet have not been assigned CC subjects by the Cabinet. These are considered the 'secondary' CCI Ministries of Government. Further information will be provided in regard to the twelve ministries of government related to CC activity and their departments and agencies in the section of this document related to policy.

The naming, defining, sub-sector inclusion and governance structures of and for cultural and creative activities have implications for the classification of data and representation in National Accounts.

Mapping CC Classification Systems and Subsector Inclusion

Cultural and creative ecosystem nomenclature, definitions, inclusions and governance structure directly affect the means and processes through which activities are delineated, classified, measured and reported. These include the related areas of policy planning, statistical design and budgeting.

Vision 2030 Classifications

"Vision 2030 Jamaica" is the country's National Development Plan. It lists among its nine focal industries, "creative industries," sport, and information and communication technology. The Vision 2030 Medium Term Framework (MTF) from March 2019 – 2021 refers to developments in Jamaica's "...creative economy and specifically its cultural and creative industries and entertainment sectors … its culture, music, talent and artistry."[42] This reference lists the 'Cultural and Creative Industries' (CCI) amongst nine 'Internationally Competitive Industry Structures (ICIS)'.[43] Of the nine ICIS named, three relate directly to sectors, activities and government portfolios that have traditionally been included in global classifications of sectors, subsectors and/or industries of the cultural and creative ecosystem and economy. Vision 2030 does not

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42 Planning Institute of Jamaica, 'Medium Term Socio-Economic Policy Framework, Vision 2030 Jamaica – National Development Plan', Planning Institute of Jamaica, 2018, 270, https://www.pioj.gov.jm/wp-content/uploads/2019/08/MTF-2018-2021-March-2019.pdf.
43 Planning Institute of Jamaica, 'Vision 2030 Jamaica', 2009.

name the other disciplines considered to be cultural and creative industries, however, the two other CCI-related Internationally Competitive Industry Structures, as listed in the Vision 2030 MTF, are 'Sport' and 'Information and Communication Technology'. Developing these Internationally Competitive Industry Structures are included as medium-term priority strategies and actions of the 15 national outcomes of the Vision 2030 Medium Term Framework.

Jamaica Industrial Classifications (JIC)

The Statistical Institute of Jamaica's Jamaica Industrial Classification (JIC) was revised in 2016. It classifies cultural and creative activity as one of 21 'Sections' - "Arts, Entertainment and Recreation." Like Vision 2030, two other Sections (Information and Communication and Professional, Scientific and Technical Activities) include elements of the broad, global definitions of sectors, activities and government portfolios that have traditionally been included as sectors, subsectors and/or industries of the cultural and creative ecosystem and economy classifications globally. The JIC further identified four subcategories[44] or 'Divisions' each with subclasses called 'Groups'. The updated 2016 JIC classifications are more congruent with the Jamaican reality of emerging cultural and creative ecosystems,[45] where many goods and services are not produced within clear industry borders. The JIC subclasses demonstrate the understanding that businesses and/or individuals, particularly in the Cultural and Creative Industries may operate in more than one industry and/or may have more than one job which may or may not have similar functions. The JIC, an indigenized, standard occupational classification, provides a framework for the integration of new data sets to classify the activities of the Jamaican cultural and creative ecosystem. Of note, the JIC extensions cover the communitarian and commercial aspects of the CCI. This classification system is also comparable with international standards to allow for uniformity in comparison and reporting.

There is a need for Vision 2030 and JIC to align their industrial classifications with the locally-chosen, uniform definitions of the sector.[46] There is also the need for all-of government to establish clear definitions of the 'cultural' and/or 'creative' and/or 'entertainment' configurations of the sector.[47] Each relates to a different configuration of subsectors and industries. This remains unclear in the Jamaican context within the Ministry and amongst other related MDAs. In addition to defining the sector, there is a further need to officially and uniformly identify and name the subsectors, industries and activities to be included in the Jamaican considerations of the cultural and creative ecosystem. The definition of the sector and the naming of subsectors and industries also must be aligned, a process that relates directly to the recognition

44 There are four 'Divisions' of the JIC: Creative Arts and Entertainment Activities; Libraries, Archives, Museums and other Cultural Activities; Gabling and Betting Activities; Sports Activities and Amusement and Recreation Activities and five 'Groups' which are subsets of the Divisions. Groups are then further delineated into 'Subclasses,' which identify sets of activities that take place within the cultural and creative ecosystem

45 The previous, 2005 JIC had seventeen (17) industries to classify the nation's economic activities. This version classified CCI under the heading "other community, social and personal service activities" under the nomenclature "recreational, cultural and sporting activities."

46 For example, the aeronautics industry may employ designers. The industry itself is not cultural, but it spawns cultural occupations. The converse is also true—a film company may hire an accountant or a computer programmer who is non-cultural, as the sectors are spread across numerous industrial and occupational classification categories.

47 The Ministry of Culture, Gender, Entertainment and Sport refers to the Entertainment, Cultural and Creative Industries, while other MDAs use other nomenclature. This contributes to the fragmentation of policy focus and an absence of clarity of the policy direction across all of government.

of activities within which cultural and creative practitioners' work and operations. Some of this data and information can be collected through the upcoming census and is required in order to account for cultural and creative participants' presence in the ecosystem and economy (both formally and informally), and to adequately classify them. The process of aligning all these elements will allow for more efficient measurement, mapping and definitive policy and decision making for the sector, subsectors, industries, linkages, activities and individuals within the ecosystem.

An opportunity for inter-ministerial activity to complete this complex exercise exists. UNESCO provides the following Cultural statistics framework as a guide:

UNESCO CULTURAL STATISTICS FRAMEWORK		
Cultural Domains	Transversal Domains	Related Domains
Cultural and Natural Heritage Performance and Celebration Visual Arts and Crafts Books and Press Audio-visual and Interactive Media Design and Creative Services	Intangible Cultural Heritage Education and training Archiving and preservation Equipment and supporting materials	Tourism Sports and Recreation

Several other classification systems exist that countries adopt and adapt in keeping with their country-specific circumstances.

Given the absence of clarity, for the purposes of completing the mapping process, NOC returned to the first principles to provide a baseline of classifications in order to uniformly describe and classify cultural and creative activities. This will allow for a clear articulation, classification and placement of cultural and creative 'stakeholders' presence' in the study. Using a concentric circles model to classify segments of the ecosystem, this approach provides a possible baseline that is a potential precursor to developing a classification, mensuration and statistical framework for Jamaica's cultural and creative ecosystem in the future, one that should include a satellite account.

One interesting trend in terms of interministerial cooperation is the emergence of sustained mechanisms to ensure regular dialogue in the fields of culture and creativity. Jamaica Creative, the country's culture and creative industries council, offers an interesting example. It was initially created in 2013 and then reactivated in 2018 with a dedicated annual budget and staff to provide an integrated approach to policy-making. It ensures continuous communication with ministries, government departments and agencies and is tasked, inter alia, with facilitating partnerships and consultations with all relevant stakeholders in the cultural and creative industries.

Moreno Mujica, 'Building Resilient and Sustainable cultural and Creative Sectors', 50.

The following questions were also asked of the Ministry of Culture, Gender, Entertainment and Sport to assist in clarifying the data gaps and to assist with the classification of the mapping creative's presence:

1. The latest data sets quoted by the Entertainment Advisory Board reveal an increase in the contribution of the ecosystem to the country's GDP[48].

2. List of subsectors that are considered within the joined up and interministerial governmental framework and whether there is an indicator of the contribution of each subsector.

3. Status reports on the sector in response to the COVID-19 pandemic that can provide insight and statistics on the cultural, creative, sport and entertainment portfolios. This can include a tally of the grants and assistance given.

4. The instruments of formulation, mandate and structure of the National Cultural and Creative Industries Council - Jamaica Creative.

5. The formal explanation/justification of the sector description "Entertainment, Cultural and Creative Industries;" in particular the inclusion of 'entertainment' in the descriptor.

6. Comprehensive analytics of the National Entertainment Registry—total numbers and any form of classification analytics that may exist.

7. The policy concepts and structures leading to the development of legislation that would be required for research design remain unclear.

NOC Mapping Specificities

The technical issues of nomenclature definition in policy, to the practical application of said policy in the CC ecosystem, along with the planned outcomes of an enabling environment, begin with the process of mapping.

NOC Mapping Classifications

NOC began its process by determining an interim classification system and definitions to which the K:NOC study will refer. These are:

- **The Cultural and Creative Ecosystem** as the full, integrated and intersecting network of cultural and creative activities taking place in Jamaica that have implications for both economic and societal considerations of culture and creativity implied in the UNESCO dualism of 'Protecting Heritage / Fostering Creativity'.

    These relate to Jamaican cultural and creative activities, individuals and organisations on the island, in its diaspora, and with its trading and exchange partners.

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48 Kellaray Miles, "$500-b in Losses," www.jamaicaobserver.com, March 16, 2022. https://www.jamaicaobserver.com/business/500-b-in-losses/.

- **The Cultural and Creative Sector (CCS)** as the singular, overarching and universal unit of analysis of cultural and creative activities for classification within the Jamaican economy[49]. This is the segment of the ecosystem that relates to the economic systems of production, distribution and consumption of cultural goods and services in relation to their social, economic and political contexts, or cultural economy[50].
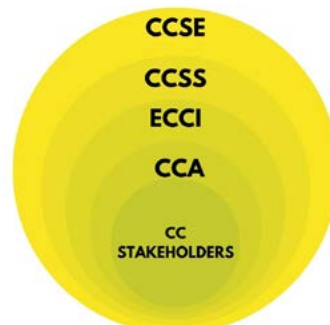
The Cultural and Creative Ecosystem JAMAICA

Cultural and Creative Sector|Economy
CCSE

Cultural and Creative Sub Sectors
CCSS

Cultural and Creative Industries
CCI

Cultural and Creative Activities
(Institutions, Enterprises, Activities, Clusters, Pods, Projects)

Cultural and Creative Stakeholders

- **Cultural and Creative Subsectors (CCSS)** as the twenty broad headings for groups of cultural and creative ecosystem activities.

- **Entertainment, Cultural and Creative Industries (ECCI):** individual industries named within **Jamaica's** cultural and creative subsectors that are anchored by intellectual property rights, having their origin in individual creativity, skill and talent, which have the common element of selling or otherwise profiting from creative works or services provided by creative actors and/or individual creativity and skill. *For example Film and Broadcast are two industries within the audiovisual subsector.*

- **Cultural and Creative Activities:** those institutions, enterprises, activities, clusters, pods and projects that span the economic and societal range that includes institutions, enterprises, activities, clusters, pods, projects and other units of analysis.

- **Cultural and Creative Stakeholders:** those individuals and organisations who operate within the cultural and creative ecosystem.

- The Kingston Metropolitan Area (KMA), including the parish of St. Andrew that has been designated the UNESCO Creative City of Music, is referred to as **The Locale** of this study, and mapping pilot.

- Given the UNESCO designation, Music has been chosen as the **'core' subsector** of the CCS and ecosystem with which various subsector intersections and linkages will be identified.

Stakeholders' Presence

Jamaica has an active, diverse, complex and integrated cultural and creative ecosystem[51]. Folk practice meets classical instruction and performance and publishing meet contemporary production and presenta-

[49] This has been and can be used interchangeably with Cultural and Creative Economy, where emphasis is on policy development as a process. These were not being considered as Terms of Art; that is, they were being used in an iterative sense to describe and place the classification for the purpose of this study. Descriptions and classifications were not used in keeping with National Accounting System definitions.
[50] DeBeukelaer and Spence, Global Cultural Economy, Cambridge, Routledge, 2019.
[51] Nordicity, 'Mapping Jamaica's Cultural and Creative Industries', 23.
Jamaica ranks 72nd in global creativity, outperforming Peru, Argentina, Dominican Republic and Trinidad and Tobago. On the creative output sub-index, Jamaica ranked 42nd, outperforming its neighbours Mexico, Costa Rica and Panama (2020, 6). Jamaica's CCIs are comprised of a vast and varied population of creatives, freelancers, SMEs, microenterprises, workers and support bodies. Nordicity's survey of over 550 CCI stakeholders reflects a workforce of creative business owners, artists, freelancers and workers from across the country, providing some insight into the composition of the CCIs.

tion in spaces across the Small Island Developing State. Much of the activity and success achieved by players within the Jamaican cultural and creative ecosystem has, historically been generated independently from the creative grassroots[52].

Cultural and creative activity is "highly fragmented, comprising numerous subsectors and genres, many of which operate within their own ecosystem."[53] A multi-talented mix of formal and informal creative workers multi-task across cultural and creative subsectors, industries, Institutions and enterprises. In this cultural ecosystem there are recording and dance studios—some formal and some that make-do, music video-locations, fashion and street food niches. Conservatories, orchestras and choral movements coexist with dancehall ecosystems. Innovative, 21st century digital shared spaces exist and there are creatives with no spaces for vocational activity. Increasingly, Jamaican creatives work within the gig economy[54] as freelance contract workers or entrepreneurs[55].

In more formalised sectors, like media, there was a significant change in the employment status of workers. The RJR/Gleaner Group, Jamaica's largest media conglomerate, reported making 37 new hires and 188 separations in 2020, with 105 of the separations being due to a "retrenchment exercise undertaken across the Group.[56]" "Staff costs"[57] reporting for 2020 and 2021 did not differentiate between contract or outsourced work and its internal staff and director emoluments. This distinction is significant in accounting for mapping and categorising creative workers' presence, many of whom exist within the informal economy, dependent on transient, irregular projects and contracts.

> Creative jobs in Jamaica are characterized by a diversity of: (a) freelancers, (b) contract workers, (c) temporary workers, and (d) permanent employees.
>
> Ministry of Finance, 'COVID-19 Economic Recovery', 117.

iCreate, another publicly listed company, reported reductions in staff in its Kingston office and also in Montego Bay due to a shutdown of its office there. As well, they reported a reduction in salary expenditure from J$24,867,691 in 2019 to J$19,300,153 in 2020. With an increasing number of formal businesses being registered in 2021[58], many from amongst the twenty cultural and creative subsectors, there are still many cultural and creative workers and practitioners—particularly those outside of the commercial sphere—who remain informal, uncounted, undefined and unclassified.

In the first two decades of the 21st century, and in particular the second decade, several changes took place within the ecosystem. In 2009, the copyright industry was reported to have contributed 5.1% to the GDP of Jamaica, accounting for 3.0% of employment[59]. In 2021, while Jamaica's cultural and creative industries'

52 Nordicity, 'Mapping Jamaica's Cultural and Creative Industries', 8.
53 Nordicity, 8.
54 A free-market system where organisations and independent workers engage in short-term work arrangements as opposed to engaging them within staff establishments.
55 Nordicity's survey comprised responses from 178 business owners and entrepreneurs (32% of respondents), 142 individual artists (25%), 127 freelancers (23%), 54 government workers (10%), 39 employees (7%), 9 industry association leaders (2%) and 8 industry association workers (1%).
56 RJR Gleaner Communications Group, '73rd Annual Report,' 2021, 43. https://www.jamstockex.com/wp-content/uploads/2021/09/Radio-Jamaica-Limited-Annual-Report-2021-digital-version.pdf
57 RJR Gleaner Group, '73rd Annual Report', 115.
58 In 2021, business registration significantly eclipsed the previous year's business registration and company incorporation numbers by 33 per cent. More than 17,000 businesses and almost 5,000 companies were registered in 2021.
59 JAMPRO, 'National Export Strategy', 89.

were estimated to contribute marginally more (5.2% to the country's GDP, generating revenues of JMD $2.2 billion annually), it still accounted for 3% of the total employment[60]. Anecdotally, trends in the ecosystem have suggested increased commercial activity in the emerging sector. This included increases in the levels of support provided to creative practitioners by international organisations through intermediary organisations, the provision of more economic support through grants, loans, incubators and other facilitation activities, and individual initiatives. There was also significantly more training provided at all levels for those interested in honing their skills with the addition of new cultural and creative courses at tertiary institutions and the addition of private sector training options.

Due to the combination of these factors, there appeared to be a greater level of interest in cultural and creative activity than what the statistics had revealed, given that professional activity and the increased participation of individuals with competencies and interests in the cultural and creative sectors vocationally and recreationally were observed. Economic Impact Assessment processes, still ongoing at the time of this report, will provide the requisite statistical analysis.

Ecosystem Composition

Five categories of stakeholders have been presented as a baseline for mapping[61]:

- Enterprises and Individuals (6 categories)

- Policy, Government, Ministries, Departments and Agencies (19 entries)

- Associations and Representative Bodies (29 entries)

- Educational Institutions (9 entries)

- Institutional Partners (13 Entries)

Other representative Nordicity metrics that impact creatives' presence in Jamaica included:

1. Visual Arts; Theatre, Dance and Performing Arts; Design; Music: and Advertising and Marketing accounted for 48% of cultural and creative ecosystem stakeholders. 52% were spread across ten additional CC categories[62].

2. One-third of respondents (61%) identified as female, 37% as male and 2% non-binary or unresponsive

3. Of the respondents, 49% identified as artists or creative practitioners and 15% as business owners, as opposed to providing support or facilitation services.

4. Entrepreneurship support; networking and collaboration and a reduction of import duties and tariffs accounted for 59% of respondents.

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60 Vanus James, 'The Economic Contribution of Copyright-Based Industries in Jamaica,' World Intellectual Property organization (WIPO), 2007, https://www.jipo.gov.jm/sites/default/files/PDF_Files/Jamaique-Study-2.pdf.
61 Nordicity, 'Mapping Jamaica's Cultural and Creative Industries', 21-22.
62 Gifts and crafts, literature and publishing, film, festivals, fairs and feasts, cultural heritage. television/broadcast, digital media including video games, fashion, culinary/gastronomy and museums, galleries and libraries

5. Of those respondents that attended university, 30% attended the University of the West Indies and 25% attended the Edna Manley College of the Visual and Performing Arts.

6. "Jamaica's cultural and creative industries are relatively mixed in age. Half of the respondents to the Nordicity survey were between the ages of 25-44 years old (50%), whilst 38% were above the age of 45, and 11% were under the age of 24.[63]"

7. "…regular Jamaicans exist outside the formal economy, with the rest working for low-paying wages without essential benefits such as health care and pension. A large population of cheap labour is a critical component of the foreign direct investment model by supranational organisations.[64]"
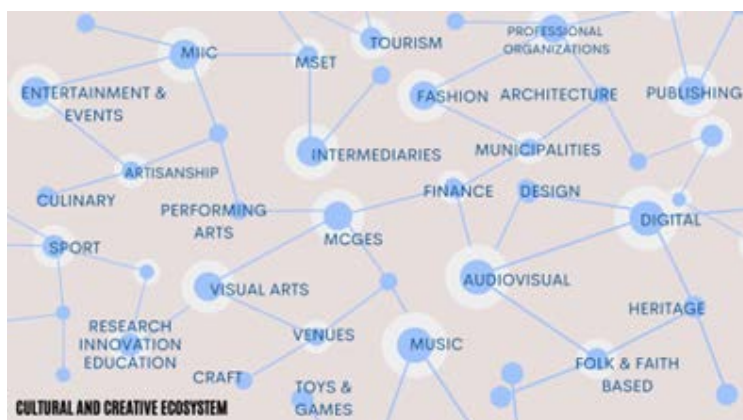
Intersections and Added Value

NOC's ecosystem approach to cultural and creative activity recognizes the irregularity of the cultural and creative sector as an important characteristic of planning for its development. Within the ecosystem, there are evolutionary interactions and linkages.

The COVID-19 Economic Recovery Task Force Final Report outlines that the linkages in entertainment, cultural and creative employment and value chains encompass a wide variety of sectors including legal, technical, financial, and related intellectual property (trademarks, copyright, sync rights, image rights, et. al)[65]. Also included are management consultants and other professionals known as intermediaries[66] related to tours and cross-border trade, and media consultants related to branding, media, media and broadcast rights, among others, making the value chain and sources of income quite diverse. There are also private/public linkages, and intra- and inter-sectoral linkages. Entertainment, for example, plays a significant role in the development of Jamaica as a tourism destination. The Tourism Networks Policy of the Ministry of Tourism has therefore fused "expertise in the sports and entertainment sectors to facilitate a collaborative approach to sector.[67]"

63 Nordicity, 'Mapping Jamaica's Cultural and Creative Industries', 25.
64 Dennis Howard, "Include Culture in Development Matrix," Jamaica Observer, July 25, 2021, https://www.jamaicaobserver.com/entertainment/include-culture-in-development-matrix/.
65 MCGES Entertainment Linkages from Wilkinson McDaniel et al, 'Understanding the Creative Economy', digital image, 10; The Creative Ecosystem from Kingston Creative FAQs, digital image, https://kingstoncreative.org/faqs/.
66 Roberta Comunian, Brian Hcras, and Lauren England, 'Understanding and Supporting Creative Economies in Africa: Education, Networks and Policy: A policy report', King's College, London, 2021.
67 Ministry of Tourism, 'Tourism Networks Policy', 6.

In this application, sports and entertainment networks are treated as a single 'Network", in the economic Locale, where "entertainment plays a role in diversifying the revenue sources as well as directly increasing tourism revenue."[68]

Other Mapping Considerations

Impact of COVID-19 on the Ecosystem

Many countries continue to underestimate the overall global economic impact of the COVID-19 pandemic on the cultural and creative industries. The COVID-19 pandemic essentially eliminated all the gains that had been made in the two decades of global Cultural and Creative Industries (CCI) growth. Relative to 2019, the fall in global CCIs' global value added in 2020 was approximately US $750bn. Globally, upwards of 10 million creatives lost their jobs in 2020. Moreover, the cultural and creative ecosystems in developing countries, particularly dealing with public policy responses, provided slower reactions to the pandemic than their

68Tourism

advanced industrial counterparts. Those responses were also seen as being more symbolic in nature[69]. Nations with greater fiscal space, already-planned cultural and creative infrastructure, processes, and supporting policies, were comparatively more able to allocate resources and develop programmes to bolster their cultural and creative sectors and stakeholders once the pandemic took hold.

The Caribbean CCI sector was severely impacted by shut-downs, postponements and the scale-down of production; the necessity to move marketplaces, festivals and other events online; the suspension of travel and tours; as well as the participation in rigorous creative and innovative processes to produce and distribute digital content that did not always translate into revenue. The impact of the pandemic on tourism further affected the region's cultural and creative ecosystems, as the linkages and intersections between the two labour-intensive sectors are significant[70].

The COVID-19 pandemic had a profoundly negative impact on Jamaica. Jamaica's COVID-19 Economic Recovery Report[71] focused on 'Entertainment' in its *Entertainment Annual Economic Impact Total Summary (Tangible Value)* and estimated that prior to the pandemic, the total tangible economic impact of the entertainment industry was ~J$84 billion[72]. Curfews, physical distancing, stay-at-home orders, the shutting of international borders, among other restrictions and measures from March 2020 through to 2022 as a result of the pandemic, resulted in "precipitous falls in economic output.[73]"

In July 2020, STATIN[74] identified 'Arts, Recreation and Other Services' as the fifth of five industries to record the largest declines in employment (12.1%)[75]. In January 2021, STATIN reported that 'Arts, Recreation and Other Services' was the second of three Sections to see a further decline in employment by 18,800, or 14.5%. **By April 2021 'Arts, Recreation and Other Services' displayed the largest decline in the number of employed persons in Jamaica during the COVID-19 pandemic.** This was borne out by an MCGES survey in 2020 that revealed that 5.5% of the sample experienced a loss of income as a result of COVID-19 due to cancellations, project delays and other issues.

69 UNESCO, 'Cultural and creative industries in the face of COVID-19: an economic impact outlook,' 2021, https://unesdoc.unesco.org/ark:/48223/pf0000377863.

70 Dirk Spennemann, 'COVID-19 on the Ground: Managing the Heritage Sites of a Pandemic', Heritage 4, no. 3, 2021, https://doi.org/10.3390/heritage4030121.

The only sector said to be worse hit by the pandemic was the aviation sector. International passenger traffic suffered a 60% fall during 2020, resulting in losses that totalled US $370bn, for a smaller sector than the CCIs. Aviation and culture being among the worst-hit global sectors sets up the story about the region's tourism sector. This in turn crippled tourism in the region. The World Travel & Tourism Council's annual Economic Impact Report (EIR) reports that COVID-19 wiped out $33.9 billion from the Caribbean's Travel & Tourism sector, and the region's loss of 680,000 Travel & Tourism jobs across the 'holiday region'. The number of those employed in the Caribbean Travel & Tourism sector fell from nearly 2.76 million in 2019, to 2.08 million in 2020, a drop of almost a quarter (24.7%). Heritage had specific issues. Site inspections and necessary conservation and maintenance work had to be delayed. many activities moved to online events and exhibitions, thus potentially reaching a wider audience, yet disembodying the message from the materiality of objects and sites. International conferences postponed, public lectures cancelled. The pandemic also generated a plethora of material culture and temporary sites worthy of examination and discussion.

71 Ministry of Finance, 'COVID-19 Economic Recovery,' 121.

72 'COVID-19 Economic Recovery', 121.

Comprising: (a) Events, Festivals & Nightlife: $56.7 billion, (b) GOJ contribution: $12.5 billion, (c) Sport: $11.7 billion, and (d) Film & TV Production, Cinema & Theatre: $3.2 billion.

73 Ministry of Finance, 'COVID-19 Economic Recovery', 15.

74 Statistical Institute of Jamaica, 'Jamaica Industrial Classifications', 2016, https://jic.statinja.gov.jm/.

75 Statistical Institute of Jamaica, 'Jamaica Labour Market: Impact of COVID-19', 2020, 11.

- 96.4% of the organisations that took part in the survey experienced loss of income.

- 95.4% of individuals experienced loss of income.

- 94.7% of persons who responded as an individual creative and a business owner experienced loss of income.

The challenges affecting the cultural sector brought into clear focus the need to build, strengthen and maintain a healthy cultural and creative ecosystem by connecting the multi-sector players within academia, public, private and non-governmental organisations (NGOs), as well as developing a more beneficial network through the formulation and funding of databases, think tanks, training programs, audiences, and production space and infrastructure. A resounding clamour from the sector pointed to the need for greater attention to be paid the 'status of the artist'. It also brought attention to the Cultural and Creative Economy, along with introspection on its political economy implications and questions surrounding its philosophy.

The Ecosystem, Cultural Economy, Political Economy and Philosophy

The nation of Jamaica is at a phase of development that is characterised as vulnerable, with low levels of per capita GDP vulnerable to external shocks, high levels of debt, comparatively lower quality infrastructure and social services, and relatively lower levels of formally-recognized research and innovation[76]. In the context of the pandemic, the PIOJ had projected that the economy would contract by approximately 12% for the fiscal year ending March 31, 2021, described as "…by far, the worst economic contraction in Jamaica's history. No previous economic decline comes even close. For the calendar year 2020, that is, January to December 2020, the economy is expected to contract by 10% as compared with the prior period of January to December 2019. The closest comparisons were the decline of 6.5% in 1975, 5.7% in 1980, 4.6% in 1985, 3.9% in 1974 and 3.2% in 2009. None of these was remotely close to the economic contraction we all lived through in 2020."[77]

In response to the pandemic, the MCGES, through the National Registry of Entertainment and Creative Industries, supported creatives via relief through the CARE Programme. Individual registration since March has increased by more than 1,000% over the similar period last year, and company registrations have increased by 87%. In 2021, J$40-Million was approved by the Ministry of Finance to assist the Culture and Entertainment sector. This J$40 million is in addition to the J$10.6 million already allocated for payment to creative practitioners under the CARE Programme[78].

76 Deborah A Hickling, "Developing Cultural and Creative Industries Policy: The Socio-Politics of Cultural and Creative Industries in the 21st Century – Focus on Jamaica," Jonkonnu Arts Journal 2, no. 1 (2015): 1–11.
77 Nigel Clarke, 'Opening of the 2021/2022 Budget Debate', Ministry of Finance and Public Service. (2021). https://mof.gov.jm/wp-content/uploads/mofp-opening-budget-debate-2021-22-with-cover-170321.pdf
78 Olivia Grange, 'Contribution to the 2020/2021 Sectoral Debate', Ministry of Culture, Gender, Entertainment and Sport, 2020, https://jis.gov.jm/media/2020/07/Sect_20200714_Final-1.pdf.

"The data showed that between March and June 2020, more than 10,000 community bars were closed, 560 round robins were not held (usually there are at least sixty per week), the festivals and events economy, including such activities as Calabash Literary Festival, Caribbean Fashion Week, Style Week and the over 7,200 events that would have been held in towns and communities across Jamaica were all shuttered… We estimate that as much as J\$26 billion has been lost and more than 40,000 creative and sports-related jobs have been affected since Covid."

Olivia Grange, 'Contribution to the 2020/2021 Sectoral Debate', Ministry of Culture, Gender, Entertainment and Sport, 2020.

From a political economy perspective, considerations of the definitions of the 'cultural' and 'creative' industries are largely ideological. As such, the ideological positioning of a nation and its political-economy choices shape its policy imperatives: "Central to this consideration are the inherent questions about the ideological emphasis of a government administration on the role of the state in relation to private sector-led development. This is coloured by the intangibles of custom, lifestyle, values, folklore, tradition, heritage and legacy that are central considerations of cultural and creative industries policy directions and decisions."[79]

"…cultural industries have largely been undervalued or ignored. Music and dance, though among the strongest areas of cultural activity in this regard, are relegated to school "breaking-up" or light entertainment for after work recreation. The reality of the massive cultural industries in developed societies has not propelled us to invest in our own…"

Ministry of Education Youth and Culture, 'National Cultural Policy of Jamaica', 30.

National political ideology directs the tone and direction of cultural policy. The prevailing JLP administration[80] is ideologically positioned as a liberal democracy, which has identified the national priorities as "securing growth, prosperity and social progress within its political context"[81] with its primary focus being "fiscal discipline; good fiscal management of the affairs of the country." Comparatively, the previous PNP administration (2012-2016) crafted their ideological mantra as "growth and development with job creation and protection of the most vulnerable."[82] While the emphases are ideologically different, both administrative periods fell within Jamaica's navigation of globalised, neoliberal realities. This is significant as in the 21st century, cultural policy changes-in-emphasis have been altered based on the political administration. These changes include the configuration of subjects at the Cabinet level, nomenclature and definition, and policy and operational emphases. The question of sector sustainability is therefore affected by this reality.

79 Hickling, 'Developing Cultural and Creative Industries Policy', 2.
80 Britannica, 'Jamaica - Government and Society | Britannica', in Encyclopædia Britannica, 2019, https://www.britannica.com/place/Jamaica/Government-and-society.
Jamaica's two main political parties are the Jamaica Labour Party (JLP) and the People's National Party (PNP). "The PNP, founded in 1938 as a democratic socialist party, leans more to the left than the more centrist and conservative JLP. Ethnic minorities (such as the descendants of Indian and Chinese immigrants) have participated in politics at the highest levels. Women have served with distinction in the House of Representatives, Senate, and cabinet, although men still predominate numerically."
81 Balford Henry, "PM Identifies Growth, Prosperity and Social Progress as Main Issues Facing His Government," Jamaica Observer, July 13, 2021., https://www.jamaicaobserver.com/news/pm-identifies-growth-prosperity-and-social-progress-as-main-issues-facing-his-government/.
82 Deborah A Hickling, "Creative Economy Policy for Jamaica: Getting Started," Inter-ministerial Working Group on the Cultural Economy, Presentation to NCCIC, October 3, 2014.

The recent Nordicity mapping process has established that the majority of cultural and creative practitioners are amongst those working poor ravaged by the impact of the COVID-19 pandemic. A clear understanding of the emphasis of decision-making for the cultural and creative sector is necessary, particularly as it relates to resource allocation for strategic sector restoration and repair. Will it be designed to address the needs of the vulnerable majority in the sector, or will it continue to favour the 'trickle-down' approach? How too, do policy decisions take into account the sector's phase of development?

Further, through a political economy lens, questions have therefore been raised regarding how, ideologically, the decision making-mix will be structured for the cultural and creative sector as the pandemic transitions. How will recovery policy be designed to address the needs of the vulnerable majority in the sector and to increase the spread of jobs across generations, skill sets and levels of competency?[83] Further exploration of this discourse can help to shape the critical thought and discourse on existing policy focal points.

Policy Focal Points

Monetizing Brand Jamaica, reimagining entertainment, investments in human capital, and reshaping sport were the three main focal points for cultural economy planning in 2021. In the year prior, making her contribution to the 2019/20 Sectoral Debate in the House of Representatives on July 23, Ms. Grange noted that although only partly staffed, the Council had initiated actions in accordance with its seminal role: "making things easier for the creative sector to access the mechanisms needed for their advancement."

As at January 2022, and at the end of the research period concluding in June 2022, the composition of the Council had not been announced nor had the body convened. As such, there is anticipation of the outline of a clear direction for cultural economy and ecosystem development.

Ecosystem Policy Recommendations

A clear cultural ecosystem mandate for development summarised from three previous studies has been commissioned to guide all-of-sector development: from the NCCIC Framework (2015); the Tom Fleming Business Plan (2016) and the Nordicity Mapping Document (2020). Converting these into policy and actionable activities as part of a master plan is an important next-step.

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83 Deborah Hickling Gordon, "'Tek Taim Gwaan Faas with the Cultural and Creative Industries," Jamaica Observer, August 18, 2021, https://www.jamaicaobserver.com/business/tek-taim-gwaan-faas-with-the-cultural-and-creative-industries/.

JAMAICAN CULTURAL AND CREATIVE POLICY RECOMMENDATIONS
2015 - 2021

Nordicity, "Mapping Jamaica's Cultural and Creative Industries", 2020.	**Three recommendations, two focal areas and fourteen measures:**
	
	1. Advance the CCI policy and sector coordination
	    a. Establish a national convening body
	    b. Coordinate and structure the CCI cooperation framework
	    c. Develop a skills strategy
	    d. Develop an infrastructure plan
	    e. Grow the CCI ecosystem and advance the value chain
	
	2. Research, measure and advocate on behalf of the CCIs
	    a. Raise the profile, understanding and value of the CCIs
	    b. Undertake further research and ongoing monitoring and evaluation
	    c. Support the CCIs through interventions
	    d. Enhance the IP and copyright environment
	    e. Leverage CCIs as tool for Covid-19 recovery
	    f. Capacity building for sector support & representative bodies
	    g. Advance availability of financial support
	    h. Foster entrepreneurship and business
	    i. Develop a funding and financing plan

Fleming, 'Creative Industries Business Plan,' 2016.	**Seven Recommended Priority Actions:** 1.The Jamaica Creative 100 2. The CCI Federation 3. CCI Digital Distribution Platforms 4. CCI Fund for Jamaica 5. Kingston Creative City and Blue and John Crow Mountains Plans 6. Kingston Creative Media Village 7. Creative Skills Council

Hickling, 'Creative Economy Policy', National Cultural and Creative Industries Commission, 2015.	**Three recommendations, thirteen focal areas and fifty-four measures:**
	
	1. Implement programmes for Enabling Environment Strategic Pillars
	    a. Institutional Strengthening
	        i. Facilitation and strengthening of guild and association formation
	        ii. Facilitation of Sector Development Plans
	        iii. Collective Bargaining
	        iv. Decent Work Framework
	        v. Community programming
	        vi. Pension/health schemes
	        vii. Legitimization, facilitation and entrepreneur empowerment programmes
	        viii. Compulsory registration/database management
	    b. Research and Development
	i. Mapping
	ii. Database development
	iii. Qualitative and quantitative industry analysis.

Hickling, 'Creative Economy Policy', National Cultural and Creative Industries Commission, 2015.

    iv.   Research relationships with tertiary institutions

    v.   Determining research priorities – micro, macro, sectoral, etc.

    vi.   Emphasis on management training across sectors

    vii.   Developing new indicators for the referencing and measurement of the CCIs

c. Marketing and Nation Branding

    i.   Product development

    ii.   Public education re: CCI specific issues

    iii.   Brand Jamaica

    iv.   Marketing and promotion

d. Domestic, Regional and International Trade

    i.   Identify means for the expansion of the trade in creative products and services, including within ethnic and mainstream markets overseas

    ii.   Regional/global free movement of cultural and creative purveyors

    iii.   Protection against unfair trade

    iv.   Identification of barriers to CCI markets

    v.   Provide a network of trade agreements affecting CCIs

    vi.   Make provisions for CCIs in future bilateral/regional trade agreements as appropriate

    vii.   Public education – trade and CCIs

    viii.   Evaluate customs and excise rules and their impact on CCI trade (movement of products)

e. Education and Training

    i.   Rationalisation of programmes across training/tertiary institutions

    ii.   Training relationships with colleges, universities and TVET institutions

    iii.   Development of standardised professional skills and certification across disciplines – National Cultural and Creative Industries Training Programme

    iv.   Rationalisation of programmes at government training institutions

    v.   Emphasis on management, administration and IP literacy

f. Business Development and Supportive Financial Structures

    i.   Entrepreneurship facilitation

    ii.   Incubation

    iii.   Investment Promotion

    iv.   Public-private partnerships

    v.   Sector education (financial institutions)

    vi.   Financial education (creative workers)

    vii.   Investment packaging and promotion

    viii.   Venture capital and equity financing

g. Intellectual Property Rationalisation

    i.   Madrid Protocol

    1.   Staffing – four trademark registration officers required

    ii.   Public education

    iii.   Legal aid facilitation

Hickling, 'Creative Economy Policy', National Cultural and Creative Industries Commission, 2015.	**h. Incentives and Taxation**
	    i. Outline of fiscal policy in relation to CCIs
	    ii. Sector consultations
	    iii. Listing of soft incentives across sectors
	    iv. Public education
	i. Governance Structures
	    i. Improving service delivery within existing governance structures
	        1. Improve joined up government service delivery
	        2. Facilitation of public-private partnerships
	        3. Address matters of competition within the public sector
	        4. Address complaints of public sector entities 'competing' with the private sector
	        5. Increasing data collection and data-driven decision making
	        6. Compulsory registration to access government services
	        7. Emphasis on public education
	        8. Design CCI Economic Assessment instruments
	        9. Developing new indicators to measure CCIs
	    ii. Public Sector Review and Reform of CCI Service Delivery and Facilitation
	    1. Audit and mapping of CCI Governance structure
	    2. Identify redundancies, duplications of efforts, roles and finances across government
	    3. Prioritisation of resourcing and budgeting
	    4. Absence of clear processes in CCI service delivery
	    5. Public sector resource rationalisation (human, financial, & infrastructural)
	    iii. Design of optimal governance structure
	        1. A single regulatory authority to be established in keeping with current discussions taking place amongst the GOJ and stakeholders.
	        2. Examination of centralization re: decentralisation
	    j. Facilities and Infrastructure
	    i. Construction of a National Performance Centre
	    ii. Audit of existing sport and performance facilities (national/community/schools)
	    iii. Plans for the upgrade and renovation of facilities (municipal/regions/communities)
	    iv. Establishment of standards for performance and athletic (mixed use) facilities
	    v. Needs analysis
	    vi. Rationalisation of existing infrastructural plans for recreation
	
	2. Implementation of the Satellite Accounting System
	3. Mega Projects
	    a. Performance Facilities Programme
	    b. Creative Capital programme;

This presents a total of 13 recommendations across 15 focal areas with 68 recommended measures from three studies[84] completed in 2015, 2016 and 2020 that relate to all sectors of the cultural economy and ecosystem. These represent modules of planned action to enable sector development.

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84 Hickling, "Creative Economy Policy," 2015; Fleming, 'Creative Industries Business Plan,' 2016; Nordicity, 'Mapping Jamaica's Cultural and Creative Industries', 2020.

Jamaica-EU Cultural Stakeholder Presence

The EU-Jamaica collaborative framework extends well beyond the notions of traditional trade in goods and services, and includes collaborations such as artistic residencies, inclusion in international networks, and collaborations that exist in digital spaces. In a preliminary desk exercise, it was found that there was no specific baseline to establish this open collaborative framework, as the focus of previous mapping exercises existed within aggregations of data from CARIFORUM country studies, and/or focused on the trade of goods and services, which is not the primary focus of this mapping. To set a baseline for mapping stakeholders, the pathways of access need to be dissected, and the relevant elements extracted and re-connected. The following relevant agreements that underline policy-level interactions between Europe and Jamaica are available for download via the Caribbean Development Bank's Website[85]:

Cooperation and/or contribution agreements

1. Economic Partnership Agreement between the EU and the Caribbean

2. Economic Partnership Agreement between the CARIFORUM States and the United Kingdom of Great Britain and Northern Ireland

3. Cotonou Agreement

Multilateral or bilateral trade/investment agreements

1. Agreement between the Government of the United Kingdom of Great Britain and Northern Ireland and the Government of Jamaica for the Promotion and Protection of Investments

2. Agreement between the Government of Jamaica and the Government of the Swiss Confederation for the Reciprocal Promotion and Protection of Investments

3. Agreement on encouragement and reciprocal protection of investments between the Kingdom of the Netherlands and Jamaica

4. Treaty between the Federal Republic of Germany and Jamaica concerning the Reciprocal Encouragement and Protection of Investments

5. Agreement on encouragement and reciprocal protection of investments between the Government of the Republic of France and the Government of Jamaica

6. Agreement between the Government of Italy and the Government of Jamaica for the Promotion and Protection of Investments

7. Agreement on encouragement and reciprocal protection of investments between Spain and Jamaica

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85 https://www.caribank.org/

The European Union (EU) and Latin America and the Caribbean (LAC) have a long-standing strategic partnership, based on shared values, history and culture as well as solid economic ties and common interests. In today's contested world, the EU-LAC partnership is of geopolitical importance.

The EU is a leading partner in Latin America and the Caribbean's efforts to achieve the Sustainable Development Goals (SDGS) and the largest provider of Official Development Assistance (ODA). For the 2021-27 period, it has allocated over EUR 3.4 billion under its new financial instrument, NDICI-Global Europe, for country and regional programmes. In addition, the EU supports initiatives to promote democracy and human rights, peace and security. and the region's participation in addressing global challenges, such as climate change, through dedicated thematic programmes.

In the 2021-2027 period, the EU will support the region's long-term recovery following the COVID-19 health emergency. In doing so, it will seek to deepen partnerships with LAC countries and regional groups to build back better, by strengthening cooperation on critical areas such as the transition to a greener development model, accelerating digital transformation, support sustainable and inclusive economic recovery, strengthening democratic governance, human rights and peace and security, while also addressing the region's deep-seated inequality and advancing social cohesion and human development.

Culture is a key dimension of the EU-LAC partnership, built on the impressive cultural ties, assets and expertise of countries in the regions. The EU works closely with the cultural institutions of its Member-States and the network organisation EU National Institutes for Cultures (EUNIC), while EU Delegations organise a range of activities to further cultural cooperation in their host countries.

In the Multi-annual Indicative Programme 2021-2027 (EU-Jamaica)[86], Jamaica offers important economic and security-related opportunities. The EU has defined its priority areas and specific objectives for the 2021-2027 period with Jamaica. This inclusive process is achieved through dialogue with Jamaica, EU Member States, civil society organisations, women and youth organisations, local authorities, the private sector, the UN and other donors and key stakeholders. The European Union's (EU) partnership with Jamaica in 2021-2027 will focus on the implementation of reforms to support Jamaica's goal of achieving an inclusive and resilient digital economy and society, on improving the country's resilience to natural hazards due to better climate change adaptation and mitigation, disaster risk management, and ultimately, on providing support to address crime and violence. All of these actions will encompass the protection of vulnerable groups (including people with disabilities, women and youth).

EU-CARIFORUM Economic Partnership Agreement (EPA)

The EPA is a development-oriented trade agreement which provides duty-free, quota-free access for all of CARIFORUM's exports to the EU from the first day of application of the EPA. For their part, the CARIFORUM countries will progressively reduce their tariffs to zero for 87% of EU products by 2033.

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86 European Union, 'Jamaica - Multi-annual Indicative Programme 2021-2027', 2021. https://ec.europa.eu/international-partnerships/system/files/mip-2021-c2021-9099-jamaica-annex_en.pdf.

The CARIFORUM-EU Economic Partnership Agreement was signed in October 2008. It is not just a trade in goods agreement, it includes commitments on trade in services, investment, trade-related issues such as competition policy, government procurement, intellectual property rights, as well as sustainable development aspects[87]. The agreement:

- helps the two regions invest in and trade with each other

- provides predictable market access for EU and Caribbean traders

- gradually opens the EU market in services, including the creative and entertainment industries, as well as the Caribbean market for EU service providers

- ensures duty-free-quota-free market access into the EU for all products

- EU exports of sensitive products are gradually liberalised over a period of 25 years

- makes it possible for CARIFORUM companies to set up a commercial presence in the EU

- provides for regional preference clauses for trade within the Caribbean region, fostering regional integration and regional value chains.

The Agreement also includes a separate Protocol on Cultural Cooperation, which aims to improve the conditions governing the exchange of cultural activities, goods and services between CARIFORUM countries and the EU. **The CARIFORUM-EU EPA is the first trade agreement in which the EU specifically included comprehensive provisions on culture.**

UNESCO released a new study on the CARIFORUM-EU Economic Partnership Agreement, titled Rebalancing trade flows between Europe and the Caribbean?[88] In this report, UNESCO puts forward that the agreement is based on the principle of preferential treatment, a compelling provision of the 2005 Convention on the Protection and Promotion of the Diversity of Cultural Expressions that has now been ratified by 146 parties, and which explicitly calls on developed countries to improve market access for cultural goods and services from developing countries, and to facilitate the mobility of their artists and cultural professionals.

Today, the EPA stands in a political climate characterised by global security concerns, increased travel restrictions and growing scepticism towards multilateralism and international cooperation—radically different from when the agreement was celebrated just over ten years ago.

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87 European Union, 'EU-CARIFORUM Economic Partnership Agreement', 2008. https://trade.ec.europa.eu/access-to-markets/en/content/eu-cari-forum-economic-partnership-agreement
88 Mira Burri and Keith Nurse, 'Culture in the CARIFORUM European Union Economic Partnership Agreement: Rebalancing trade flows between Europe and the Caribbean?' United Nations Educational, Scientific and Cultural Organization (UNESCO), 2019. https://en.unesco.org/creativity/sites/creativity/files/policyresearch-book3-en.pdf

The cultural protocol has led not only to new opportunities for Caribbean creators, but also to the greater recognition of the creative sector as an integral part of sustainable development. Over the past decade, various governments and domestic stakeholders have created cultural policies, creative trade agencies and established artists' registries.

The Protocol provides creators with innovative schemes: Caribbean audio-visual productions, when compliant with the 80/20 co-production ratio set by the Protocol, can enter the EU market on equal footing as works produced in the EU. The PCC also allows cultural practitioners to enter the EU in order to collaborate on projects, to receive training, and to engage in production and other activities, as long as they are not involved in commercial activities in the EU. Yet, the study reveals that the potential of Protocol remains largely untapped, and the expected increase in cultural exchange and diversity of cultural expressions has not materialised. The main obstacles to full utilisation of the PCC are visa or co-production facilitation issues, which fall under the authority of the EU Member States[89].

Diplomatic Missions Abroad

Jamaica has two resident diplomatic missions in the EU—in Belgium and Germany—which provide a mechanism for the advocacy for Jamaican issues and interests, bilaterally, bi-regionally and within the frameworks of agreements

EU Diplomatic Missions in Jamaica

There are embassies and/or consulates for the following EU countries, Belgium, France, Germany and Spain, located in Kingston, Jamaica, and a number of Honorary Consuls and Consuls-Generals representing other EU countries.

The EU Delegation to Jamaica was established in 1975 following the signing of the first Lomé Convention in Togo. The Delegation also covers Belize, The Bahamas, Turks & Caicos, and the Cayman Islands. On its website, the following statement outlines what precisely the EU Delegation to Jamaica does:

The European Union is a key development partner in the Caribbean. Through its programmes, the EU assists not only the government of the respective territories but offers financial assistance to non-governmental organisations and social upliftment entities. The programmes are diverse and tailored to meet the priority areas of each country.

Our assistance focuses on citizen security, corruption, reform of the justice sector, human rights, gender-based violence and poverty reduction, among other areas.

While the nature of how we fund these different areas has changed over the years, there is no doubt that we continue to strengthen our ties with Jamaica and other territories. A testament to this is the number of persons who have benefitted from our programmes and the good relationship we continue to share with the government and other stakeholders in the five countries.

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89 Burri and Nurse, "CARIFORUM European Union Economic Partnership Agreement," 2019.

EMERGENT THEMES

The complexity of the cultural and creative ecosystem along with the depth and breadth of issues for critical examination of the Jamaican CC sector has led us, in this report, to limit our thematic examination of the myriad cultural economy considerations and to encompass them within two broad thematic headings: the need for extensive measurement, research and policy action related to Financial Inclusion and Access to Finance; Inclusion, Formalisation and Community; and Digitization.

Financial Inclusion and Access to Finance

Perhaps the greatest threat experienced by Jamaican creatives due to the absence of a clear cultural economy structure is the basic economic construct that there are too many creatives demanding too few sources of finance. As a result, there is fierce competition for the available funds with only the best positioned businesses benefiting from the limited opportunities. As such, the Planning Institute of Jamaica (PIOJ) reported that commercial bank loans and advances to creative businesses "fell by JMD$1,890 million to JMD$2,491 million.[90]" Creatives have a prolonged issue of obtaining appropriate financing that is independent of the different stages they are at in their life cycle. In other words, whether they are prestarts, new businesses, or have been in operation for years, creatives in Jamaica have encountered challenges securing finance. This reality leaves the most vulnerable of creatives underdeveloped and stagnating.

The Nordicity Report provided the following baseline:

> Financing:
> The valuation of cultural and creative intellectual property (IP) was identified as the main barrier to financing by half of the survey respondents (50%). Related to this, meeting stringent or unsuitable loan requirements from lenders was considered the second-most significant barrier to financing, one which was identified by nearly one-fifth of the survey respondents (18%). A lack of financial skills was deemed the third-most significant barrier to financing, identified by 16% of respondents, followed by business pitching to investors (10%). Meanwhile, the Planning Institute of Jamaica reports the stock of 'Loans and Advances to the Entertainment Industry at Commercial Banks fell by JMD $1,890 million to JMD $2,491 million.
>
> Approx. 5% of the survey respondents indicated other challenges, including a lack of business and entrepreneurship skills and a disconnect between the financial sector and the cultural and creative industries. Whilst only 1% of respondents identified 'difficulty to list on the stock exchange' as the most significant barrier, several key informant interviews revealed this as a significant challenge, particularly for digital and technology-oriented creative businesses. Meanwhile, for many cultural and creative businesses, a stock exchange listing is unfamiliar and not commonly used or sought as a mode of financing.

90 Nordicity, 'Mapping Jamaica's Cultural and Creative Industries', 47.

Financial inclusion and access to finance are seen as the predominant challenges for the sector. Traditionally, CCIs source funding to capitalise their project in the following ways:

Self or collective financing: Most creatives fund their business from their personal funds. The funds stem either from their formal job(s) or informal sources. Pay as you Earn (PAYE) workers[91] use salaries or the stability of their jobs to obtain loans to start their businesses. Additionally, creatives may use traditional collective financing means such as "pardner, round robin, run-a-boat, farm day[92]" financing, along with borrowing from relatives and friends. This is not always successful nor is it sustainable.

Sponsorship: Many cultural and creative practitioners secure funding for project execution through the means of making *quid pro quo* arrangements with other private sector companies, usually with the corporate entities that align with the brand of the project in exchange for financial consideration. Decision making in this regard is highly subjective and depends heavily on alignment of interests. The solicitation of sponsorship and perceived equal exchange of value has been described as a tedious and debilitating process. Yet, it remains one of the more prevalent funding methods for audiovisual productions[93]

Fundraising: This source of funding is obtained through philanthropic ventures rather than profit-seeking. While it gains the funding needed, it will not be a sustainable source of funding for profit-based projects nor business development.

'Contacts economy:' This is the use of networks or culturally-skewed social capital often based on economic strengths and social class to raise traditional financing[94]. Creatives then rely on a strong backer to either vouch for the legitimacy of their business or to obtain the financing on their behalf. Questions of social capital, nepotism and the equitable nature of 'using yu contacts' (accessing your contacts) are common considerations of this issue.

Microfinance: These are high interest, short-term loans from nonbank financial institutions. According to NFIS[95], these institutions charge over 50% interest on microcredit.

Hybrid Funding: A wide variety of hybrid financing mechanisms exist within the sector which differ in their relation to subsectors. "Co-production options were also explored but were challenged by trade policy, support and financing. A hybrid of television deficit financing, used to procure overseas programming -where the broadcaster pays the creator a licence fee in exchange for the right to air the show, was another option. Because the licence fee is significantly less than the cost of producing the programme, this model was unhelpful for local producers, given the hefty price tag of production. Shared risk financing models became more popular. Television stations and producers shared in the financial risk when considering adopting a new programme. The issues of shared rights and creative control constrained the producer

91 Workers included in the formal Jamaican tax system.

92 Deborah Hickling, "Financial Inclusion, Creative Literacy and Caribbean Creative Industries," In-Person (Mona School of Business and Management Conference, 2019).

93 Deborah Hickling Gordon, "Bridging a gap: Financial inclusion and the cultural economy," in Rebuilding on a Foundation of Resilience in Post-Pandemic Jamaica, 1 no.1, 2020, 14. https://issuu.com/msbm-ezine/docs/msbm_e-zine.

94 Hickling, "Financial Inclusion," 2019.

95 Bank of Jamaica, 'National Financial Inclusion Strategy', 2017, https://boj.org.jm/wp-content/uploads/2019/07/NFIS_Brochure.pdf.

while the notion of sharing the advertising market constrained the broadcaster. While the shared risk model allowed for the perpetuation of production, it was still not a perfectly comfortable fit for all."[96]

Grant Funding: This is another means of financing cultural and creative projects, practitioners and companies. Funding has been available from local, regional and international sources. Grants are available from many institutions; however, like sponsorship, the creative must meet certain criteria and their interests must align with those of the donor.

The Development Bank of Jamaica, MCGES, JBDC and EU, UNESCO IDB, British Council, and other non-government institutions are a non-exhaustive list of sources of grant funding. Many provide grants through programmes designed by intermediaries, including Kingston Creative[97]. These grants are funded through the national budget or stem from grants from multilateral organisations.

There has been the issue of funding, and in particular the development of a dedicated fund for creative activities. Extensive funding is provided for creative projects and programmes through international organisations. Funding has also been made available for Jamaican creatives through the Caribbean Development Bank's Creative Industries Development Fund[98]. Some of the funding programmes that exist in Jamaica include:

- The Jamaica Screen Fund[99] which offers up to 45% of a project's eligible budget for both local and international productions. This fund has been under development by JAMPRO, Jamaica's national trade, investment and export agency

- The Jamaica Social Investment Fund[100], contributing to Sustainable Development in Jamaica:

- Kingston Creative[101] not-for-profit enables Caribbean creatives to succeed, so that they can create economic and social value, gain access to global markets, and have a positive impact on their local communities

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96 Deborah A Hickling, "Funding Television Production Part 1," Jamaica Observer, September 10, 2021, https://www.jamaicaobserver.com/business/funding-television-production-part-1/.

97 Grants provided by Kingston Creative with the cooperation of new regional and international partners such as grantor American Friends of Jamaica and subcontractor Fresh Milk launched the project. Kingston Creative was the lead agency implementing the $320,000 USD (or JMD $47 million) COVID-19 Caribbean Arts Grant. This programme ran from August to December 2020, providing emergency financial support as well as training in digital skills necessary to navigate this pandemic, and consultancy vouchers, artist talks, stay home residencies and the opportunity to showcase their talent online to over 1,200 Caribbean creatives from 25 countries.

98 The CIIF provides grant funding for innovative projects within the creative industries sector. These projects should be focused on: supporting the enabling environment for the development of the creative industry, improving the quality and dissemination of research on the CI sector, enhancing or creating data intelligence or data collection methods in ways that can move the sector forward and; enhancing the technical capacity of creative entrepreneurs.

99 Chris Evans, "Exclusive: Jamaican Government Advances Screen Fund," www.kftv.com, March 4, 2020, https://www.kftv.com/news/2020/03/04/exclusive-jamaican-government-advances-screen-fund.

100 Keisha A. Mitchell, "The Jamaica Social Investment Fund: Contributing to Sustainable Development in Jamaica," International Journal of Research in Engineering and Social Sciences 6 no. 8, 2016, 20-28.

101 https://kingstoncreative.org

- The CHASE Fund[102]; culture is one of five defined areas for funding and is allocated 15% from the consolidated CHASE fund.

- The promotion agency JAMPRO has also been working towards establishing a Film Fund in 2019. "The national film fund is an alternative to the rebate incentive programme for filming that exists in countries such as Costa Rica, Puerto Rico, the Dominican Republic, and Trinidad and Tobago.[103]"

The greatest existing challenge related to accessing grant funding in Jamaica has been the onerous application, monitoring and evaluation processes; a lack of capacity to complete applications; the unaffordable costs of compliance and application for organisations and individuals that exist in the subsistence mode; and the existence of large numbers of informal organisations and individuals that are ineligible.

Formalisation, Inclusion and Communities

Several inclusivity gaps have been observed within the Jamaican cultural and creative ecosystem; this emergent theme will become a focal point of this study. Financial inclusion, addressed above, is one of the areas of focus. Moreover, perceptions of exclusion exist with respect to banking and access to finance, in relation to the structure of the cultural and creative ecosystem, and also within systems of governance. This study will examine these perceptions within the ecosystem in relation to formalisation, financial inclusion and mapping processes.

There are other considerations that are globally applicable along with those peculiar to the Jamaican circumstance. 'Legitimization' is a significant issue for Jamaican creatives—the creative's perception of being 'less counted'. This Jamaican colloquialism means to be disregarded, to have your talent, value and worth underrated, or your worth unrecognised; to be 'disrespected' or ascribed a state of illegitimacy. Another of these is the local/regional socio-cultural, post-colonial concepts of 'smadification', or to be deemed 'smaddy' (somebody/someone).

> Cultural cringe' and low 'collective esteem' were identified despite demonstrable capabilities of audiovisual workers and teams. Socio economic challenges and an absence of a clear market for audiovisual productions also negatively affected the consistency of production. In addition to material support, industry players need for 'smadification' manifest in Jamaican television. Jamaicans have a deep-seated cultural quest to be respected, to be regarded as "smaddy". To be 'less-counted' is the antithesis of 'smadification', the Jamaican colloquial term used to describe the process of becoming or seeming 'to become somebody.'
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> Hickling Gordon, "Cultural Economy and television," 170.

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102 Culture, Health, Arts, Sports, Education Fund. "About the Fund," CHASE Fund, 2017. https://chase.org.jm/about-the-fund/.
The CHASE Fund was established in late 2002 by way of provisions in the Betting, Gaming and Lotteries Act. Until recently, the Fund received a percentage of the proceeds from the gaming industry, which it used to invest in five defined areas of national life: Culture, Health, Arts, Sport and Early Childhood Education. Since April 1, 2017, the Fund operates from a subvention from the Consolidated Fund.
103 Chad Bryan, "JAMPRO Working to Establish National Film Fund – Jamaica Information Service," March 31, 2019, https://jis.gov.jm/jampro-working-to-establish-national-film-fund/.

…being 'less-counted'. This means to be disregarded, have your talent, value and worth underrated or your worth unrecognized; to be 'disrespected' or ascribed a state of illegitimacy which causes one to second-guess themselves…Caribbean philosopher Charles Mills coined the Jamaican Creole term 'smaddifyin', notes that it is the single word that encapsulates the many dimensions of struggle of those historically subordinated in the Caribbean. The word signifies "…the struggle to have ones personhood recognized in a world where primarily because of race, it is denied." (Mills).

Deborah Hickling, ''Cultural Institution' to 'Industry Institution'? A Comparative Analysis of the Television Industry in Jamaica and Ghana 1997-2009.' University of the West Indies, PhD Thesis. 2011, 324.

The valuation of cultural and creative intellectual property (IP) was identified as the main barrier to financing by half of the survey respondents (50%). Related to this, meeting stringent or unsuitable loan requirements from lenders was considered the second most significant barrier to financing, identified by nearly one fifth of survey respondents (18%). A lack of financial skills was deemed the third most significant barrier to financing, identified by 16% of respondents, followed by business pitching to investors (10%). Meanwhile, the Planning Institute of Jamaica reports the stock of 'Loans and Advances to the Entertainment Industry at Commercial Banks fell by JMD $1,890 million to JMD $2,491 million.

Approx. 5% of the survey respondents indicated other challenges included a lack of business and entrepreneurship skills and a disconnect between the financial sector and the cultural and creative industries.

Nordicity, 'Mapping Jamaica's Cultural and Creative Industries', 48.

Jamaica's neoliberal evolution brought with it a move towards a 'formalisation' of actors within the Jamaican economy. Since the 1970s, Jamaica has experienced slow economic and employment growth. This was exacerbated by the world recession of 2008 and the 2019 pandemic which created many challenges in the labour market[104]. In order to find solutions, processes to alleviate unemployment in the rural areas as well as to provide support for the large amount of informality, which exists in the country, have been sought. The lack of employment opportunities has forced some into self-employment, while others have become involved in illicit activities. As a consequence, the country has experienced numerous socio-economic challenges and the informal economy[105], estimated at 37%, in 2015 is now estimated to represent between 45% and 50%. This emerges as a significant factor in the inclusion/exclusion dialectic of Jamaica's CC ecosystem.

Jamaica's cultural and creative activities take place through a mix of formal and informal economic structures.

104 International Labour Organization, 'Formalization of the Informal Economy in Jamaica', 2016, https://www.ilo.org/caribbean/projects/WCMS_532641/lang--en/index.htm.
105 International Labour Organization, "Informal Economy," 2016.
Informal economy as "all economic activities by workers and economic units that are – in law or in practice – not covered or insufficiently covered by formal arrangements."

By their very nature, cultural and creative workers and practitioners make up a significant number of informal workers. As a result, for the emerging sector the CC ecosystem has been a focal point for formalising the business activities within the ecosystem. This has taken place despite an inherent irony in the slowness of the Jamaican public sector at carrying out the technical activities required to establish CC sector formalisation within its larger economy.

The measurement and classification of data, as discussed above, relate directly to the matter of formalisation in Jamaica. The appropriate data collection and analysis of the existing data can assist in determining the number of informal workers coming from the cultural and creative ecosystem. In this regard several measures have been taken in the last decade aimed at addressing the great deal of informality that exists in-country. These include the encouragement of business registration for entrepreneurs; better banking and compliance regulations; entrepreneurship training, incubators and investment readiness programmes; incentivization through grant availability for registered entities and other measures.

There is a need for additional research and for the development of metrics and indices concerned with the Cultural and Creative Industries for Jamaica, so as to determine the size, scale, location and scope of the related economic activity and its potential[106]. Nordicity identified the difficulty in "sifting through various accountings of each CCI, that a more robust accounting for the cultural and creative industries is needed." Specifically, there is a need[107] to standardise and create processes to measure progress through key performance indicators (KPIs) and the impact of industry and government measures.

- How many people are employed,

- at what level,

- how much the sector is actually exporting,

- what the economic and labour impact of the sectors is, as all comprise part of the basic measurement tools.

Additionally, it identifies recent research and data initiatives within Jamaica by the Ministry of Culture, STATIN, JBDC, PIOJ, and JAMPRO, while acknowledging that research and analysis is necessary to support the growth of the sector, particularly to be authoritative in terms of impact on society and the economy. Additionally, the JBDC will—in its next phase of research—commence an economic analysis of Jamaica's CCIs in collaboration with other agencies of government. The proposed economic impact assessment is supported by UNESCO and will further advance the process of formalisation of the sector and the individuals in the sector. As well, there is a need for verification of the contribution of the CCIs to Jamaica's economy[108].

This further impacts the government's intention to address the formalisation of what is still a largely informal ecosystem. Satellite accounts also provide a framework linked to the central accounts which

106 Hickling, 'Creative Economy Policy', 2015.
107 Nordicity, 'Mapping Jamaica's Cultural and Creative Industries', 49.
108 Nordicity, 'Mapping Jamaica's Cultural and Creative Industries', 16.
The UNESCO estimation is that CCIs contribute 5.2% of the country's GDP and generate revenues of JMD $2.2 billion annually, accounting for 3% of total employment. The Planning Institute of Jamaica estimated the 'Other Services Industry,' of which the Recreational, Cultural and Sporting Activities (RCS) sub-industry accounts for the largest share, recorded an increase of 0.9 per cent in Real Value Added' in 2018.

enable attention to be focused on a certain field or aspect of economic and social life in the context of national accounts. This will allow for a greater delineation of the economic value of cultural and creative industry activities within the economy. While there is a risk of double counting, cultural and creative activity satellite accounts are necessary in the early growth phases so as to measure the economic contribution of these activities in four ways:

    i.   Activity in the industry supply chains for cultural and creative goods and services

    ii.   Activity in other industries performed by workers in cultural and creative occupations

    iii.   Volunteer services for cultural and creative institutions

    iv.   Non-market output of market producers in the CCIs.

It has been proposed that new systems of satellite accounting be designed and implemented in order to allow for the collection of further, better economic data on CCIs. Phenomenological data that record reasons for non-compliance, apathy and voluntary informality are also required. These are other areas of research and development required for the future.

Digitization

Jamaica's National Science and Technology policy pointed to the technological gap, megatrends, public vs private research and development disruptive technologies, as well as security threats, including the theft of infrastructure[109]. Jamaica has also been identified as having made significant strides in "implementing technologies to support a digital business environment. There is relatively advanced information communication technology (ICT) infrastructure, with 4G LTE telecoms networks; a deep penetration of smart device availability and usage with 112 per cent mobile subscriptions or 3.24 million devices from a population of 2.9 million (according to HootSuite data published early 2019); a financial services regulatory framework with considerable maturity and a growing appetite for entrepreneurial and even entrepreneurial innovations and creativity."[110]

The World Bank (2018) records Jamaica's Internet penetration rate at 68.21%, third-highest in the Caribbean behind Barbados and the Bahamas. Younger generations are becoming increasingly technologically proficient and are developing an extensive understanding of technology, having grown up during the technological era. This enhances the likelihood of continued interest in and the growth of technology on the island, which furthermore increases the chances for advancements in 'CreaTech'.[111]

Capacity building is another area of focus. A growing number of people are being educated in technology from soft skills like coding to technical skills. More significantly, the CCIs are benefiting from increasing numbers of people skilled in music and film production, photography, editing, and graphic design, among

[109] Recently, cases where technology has been used as part of initiatives like public Wi-Fi, have resulted in the theft of hardware and equipment including modems, wiring, antennas, etc., which are important issues for consideration in the move towards a digital economy.
[110] Management Control Systems (MC Systems), "Digital Transformation: Where Can Jamaica Go from Here?," MC Systems, December 19, 2019, https://www.mcsystems.com/knowledge-centre/digital-transformation-where-can-jamaica-go-from-here/.
[111] Jevaughn James, 'Advancing CreaTech in Kingston Jamaica - a UNESCO Creative City of Music: Cultural District Concept', Capstone Project, 2022, 11.

others. These are all areas that advance 'CreaTech'.

Unfortunately, where digitization has been identified as a priority, there needs to be the enjoining and conjoining of the development of creative skill-sets and cultural connectivity to the process of digital development, and the recognition that core creative skills are required for digital content production.

PROBLEMATIQUE

NOC Focal Gaps in Jamaican CC Ecosystem Research

A number of gaps that exist in the current literature regarding Jamaica's cultural and creative ecosystem and policy were identified. Beyond repeated studies identifying a need to address these issues, extensive data gaps in the several areas were identified. These were chosen as focal points for the NOC study, in keeping with its mandate:

- Absence of a data-driven holistic policy framework for the Jamaican cultural and creative ecosystem that will provide a framework for uniform mapping

- Data fragmentation leads to the mapping of silos

- Data on economic structures and a cultural economy model are required

- There is a need to deepen and broaden discussions about the EU-Jamaica exchange

- The status of the artist is a central concept to be added to policy and legislation considerations

- Unclear paths exist to integrate creativity, innovation and technology

- Unclear pathways to inclusion, representation and issues of inclusion in Kingston

- Little evidence is seen on policy decisions being data-driven, and insufficient evidence exists regarding its application to programmatic decisions.

These are further expanded.

1. **Absence of a Holistic Policy Framework for the Cultural Ecosystem:** Several enabling policies and laws for specific applications and activities in the cultural and creative ecosystem exist. These include the Fiscal Incentives Act, the Entertainment Registry, and others that govern important, specific activities across the ecosystem through Ministries, Departments and Agencies of government. There is, however, the need to develop a holistic cultural economy policy framework for the 21st century[112]. This policy should be reflective of the nation's identity, principles, history, cultural phenomena and ethos. It should also be in keeping with changes in global ideological positions. Such a policy

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112 MC Systems, "Digital Transformation," 2019.

and set of legislative solutions should also include an indigenized economic model, and the policy framework should ideally present a governance structure, and address and align nomenclature, definition(s), sector inclusion, classifications and ecosystem structure. It should also present a plan that includes the rigorous articulation and analysis of measures that are designed to deliver efficient, effective and consultative policy, legislative solutions and programmes to Jamaican creative economy stakeholders. Additionally, such a policy should serve the Jamaican cultural economy ecosystem through the provision of a planned and integrated enabling environment. It should also provide locale-specific plans, civil society organisation and CSO-led subsector development plans, and supporting policy and legislation. The absence of a data-driven, holistic policy framework for the Jamaican cultural and creative ecosystem retards the process of uniformly mapping and researching the sector in general.

2. Data Fragmentation and the Mapping of Silos: Extreme data fragmentation exists within the cultural and creative sector. This study has confirmed that there is an 'overwhelming' presence of myriad types of data sets regarding the cultural and creative ecosystem. While several previous studies have mapped and referred to elements of the ecosystem, to date no research plan exists to strategically align and resource the research needs for the cultural and creative sector. As such, research efforts take place on an ad hoc basis and there can be ignorance, misalignment or nonalignment of CC data in various spheres. Accordingly, much of the research treats sectors, subsectors and their activities as silos and has not articulated the significance of understanding intersections within the CCI to elaborate growth and development paths for Kingston's CC ecosystem. The purpose of each mapping exercise that has been implemented in Jamaica has been intended to identify solutions for immediate implementation and to solve immediate problems; these mapping studies have not been designed as part of a holistic development plan. As such, building on previous research projects is an important objective of this study, and it is meant to provide technically relevant information and spatially significant data, and to acknowledge and build on those intersections with newly available tools. The methodology takes note of these research and analytical gaps in the conduction of the analysis. Lastly, this information is necessary for developing policy level solutions.

> **One senior (Jamaican) entertainment government official explained in an interview:**
>
> "Once the public does not perceive entertainment as an industry, it is difficult for the government to spend. Government spending is directed by public acceptance. So, when you put a waiver for the motor vehicle industry or the tourism industry, it is accepted by the public, you put a waiver for entertainment, it is resisted by the public."
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> Christiaan DeBeukelaer and Kim-Marie Spence, Global Cultural Economy, Cambridge, Routledge, 2019.

Another important issue that impacts the mapping methodology is the rapid formulation of new groups and activities in an informal economy. These include a recent increase in the number of (and interest in) professional organisations and collective bargaining organisations in the ecosystem.

There is also a growing number of emerging cultural intermediaries[113], clusters, and production pods, as well as databases, in the Jamaican CC ecosystem that need to be accounted for. This relates directly to the theme of inclusion. The MCGES has a view of almost all of these new intermediaries through the Entertainment Registry. Other MDAs also have databases that require cross cutting analysis and disaggregation in order to determine how best to integrate and use the existing data to add further value to holistic sector development.

Economic Structures and a Cultural Economy Model

Like the matter of data, the articulation of a holistic economic structure for the CC ecosystem remains unclear. While a fiscal incentive regime exists and is being accessed by sole film and music practitioners and businesses, and since the Fiscal Incentive Act (2015) applies in tandem with the National Registry of Entertainment and Creative Industries Practitioners of 2013, there is a need for clearer articulation and communication regarding the purpose of the legislation in articulating a model for the cultural and creative economy. This would include updated value and supply chain analysis and development, financial inclusion programmes, the formulation of an incentives regime, and other elements of fiscal policy which are required for the development of a holistic policy structure. Additionally, value and valuation processes require strengthening, a process that requires the alignment of economic data.

3. **EU-Jamaica Exchange** is treated within the CARICOM-EU Economic Partnership Agreement's Cultural Protocol. The clearest articulation by Jamaica on this matter is in relation to visa regimes in the EU. Jamaica is not among the nine CARIFORUM States benefiting from the visa waiver programme, which are Antigua and Barbuda, the Bahamas, Barbados, Dominica, Grenada, St. Kitts and Nevis, St. Lucia, St. Vincent and the Grenadines, and Trinidad & Tobago. Along with Jamaica, Guyana and Belize are also excluded. A limitation to the visa waiver programme, however, is that it may not facilitate temporary entry for contractual service suppliers and independent professionals as contemplated[114] by the EPA. Another issue is the length of stay granted as the visa waiver is structured to facilitate short stays that are not in excess of 90 days in any 180-day period. In instances where longer stays are necessary, national visas are required. Jamaica has long advocated for the visa waiver to be extended to all the members of CARIFORUM that are signatories to the EPA, including Jamaica. Jamaica has a strong interest in this waiver extension since approximately 25-30% of Jamaica's artists embark on tours lasting for upwards of five months, often with more than half that time spent within the EU and the UK. As a result, a visa regime that impedes the free movement of entertainment practitioners is likely to have deleterious effects in the long term on the ability of creative practitioners to earn from their craft. Jamaica has further advocated for the imposition of the Touring Artist Visa to facilitate multiple entries of entertainment practitioners within a given period as well as the harmonisation of

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113 Comunian, Hcras, and England, 'Supporting Creative Economies', 12

Cultural intermediaries are defined as individuals or organisations that facilitate the growth and development of creative individuals, and/or CCIs and projects. They play a vital role in supporting the sector by providing access to information, skills, resources and networks that enable individuals in CCIs to fulfil their mission and creative or business goals..

These types of organisations are becoming increasingly popular in developing countries and a significant number have emerged in Jamaica. Further research is required, and their inclusion in a mapping document is deemed necessary for the Methodology of the Action.

114 European Union, 'Monitoring the Implementation and Results of the CARIFORUM_EU EPA Agreement', 2014. http://trade.ec.europa.eu/doclib/docs/2014/october/tradoc_152825.pdf.

visa regimes across the Schengen region to allow for the free movement of Jamaican practitioners. Lastly, there is also a need to examine those matters related to exchange and partnership, including matters of cultural exception.

4. **Unclear paths to Integrating Creativity, Innovation and Technology** There is no clear, defined or declared policy alignment between the technology policy and the culture/creative industries policy to take account of the convergence of ICT, Culture, Innovation, AI and machine learning. The matter of creative inclusion speaks to the extent to which the creative agenda is included in the digital agenda, given the symbiotic nature of the sectors. Policy trends have seen the development of a digital footprint with insufficient attention paid to creative production and its linkages. Creative inclusion also speaks to challenges dealing with access to technology and the internet, particularly within remote rural communities, as well as by individual creatives challenged by their socio-economic circumstances. Significant research is required in this regard.

5. **Unclear Pathways to Inclusion and Representation** Various sentiments of exclusion and the quest for legitimization are often repeated within the Jamaican cultural and creative ecosystem. The perspective that cultural and creative activities are 'not taken seriously,' or 'not seen as real work' are often repeated in the cultural and creative ecosystem. This seemingly intangible, conceptual and subjective matter has had a profound material impact on the operations of the sector and acts as a "hindrance for artists being included in the wider society, hindrance for talent, whether artistic, managerial, or even financial, from entering the industry[115]."For example, students seeking to engage in further studies of artistic disciplines are often discouraged by their parents; perceptions of selective government decision-making and state-actors competing for resources with the sector it serves through the allocation of resources; and the belief that access to services are challenged based on notions of nepotism, cronyism and corruption also negatively affects relationships within the sector. The music sector, and in particular the indigenous popular genres of Reggae and Dancehall and their derivative industries (sound systems, stage shows, dancehalls and others), along with their stakeholders all reiterate their perceptions of exclusion: "In the Jamaican context, interviewee after interviewee noted the disregard of the reggae and dancehall industry by the government and the wider society[116]."Forms of exclusion have been identified in the global context as related to the organisation of labour, nepotism, and as resulting from societal structures, challenges to diversity and marginalisation. In Jamaica, this marginalisation of the creative class has been related to social class in large part in reference to the audiovisual sector where "unspoken perceptions of inequity in the audiovisual sector resulted in the emergence of behaviours characterised as culturally endemic forms of mistrust and acrimony.[117]"Stratification is also seen in that sector where individuals work within invisible, stratified lines on a scale from elite to service provision[118]. This sentiment is spread across the subsectors of the Jamaican cultural and creative economy and is directly related to questions of formalisation of the sector as part of the Jamaican economy. The "deep-seated cultural quest to be respected, to be regarded

115 DeBeukelaer and Spence, Global Cultural Economy, 60.
116 DeBeukelaer and Spence, Global Cultural Economy, 60.
117 Hickling Gordon, Cultural Economy and Television, 72
118 Hickling Gordon, Cultural Economy and Television, 72.

as 'smaddy' (to be someone) is negatively affected by notions of operating in sector that is 'less-counted' (underestimated)[119]" and illegitimate. There is the need to further understand this phenomenon and its real contribution to sector retardation in the form of mistrust, apathetic responses to formalisation efforts, and the need for a programmatic response though a sector-communication intervention of healing, restoration, confidence building for the converged sector,[120] as part of the holistic sector policy planning. This must have a clear research imperative, to ensure that the results are applied to data-driven decision making for the sector.

6. **Insufficient Exploration of the Formal/Informal Dichotomy; Relationship with Financial Inclusion; Access to Finance and Governance**

The issues of access to finance and financial inclusion have been identified as being of significant importance to the development of the cultural and creative ecosystem in Jamaica. Specifically, these are directly related to the formal/informal sector dichotomy; in fact, almost 40% of Jamaicans are believed to be in Jamaica's informal economy. The System of National Accounts allows for the measurement of both the informal economy and in terms of Jamaican GDP estimates. As such, it partially accounts for informality. Informal enterprises may include own-account, sole trading business owners. Although their businesses are registered, their classification as 'informal' is based largely on compliance and registration requirements and thresholds for the measurement of formality/informality.

Although the STATIN is tasked with collection, compilation and analysis of statistical information, the Act does not mandate a common standard for such collection, compilation and analysis throughout the statistics system. In other words, the Statistics Act governs STATIN but not the producers of official statistics within the ecosystem. This contributes to the reason why there are no harmonised concepts, definitions, methodologies, standard classifications or geographic demarcations thereby limiting the ability of the national statistics system to respond to data requirements from policy makers, businesses and the public. Inadequate allocation of human and fiscal resources, weak information technology infrastructure and limited statistical awareness among producers and users of statistics further widen these data gaps.

Paris21. 'National Statistical System Assessment: Jamaica', Statistical Institute of Jamaica, 2018.

Understanding the range of issues in relation to the formal and informal economy and formalisation in the cultural and creative industries in Jamaica is under-researched in relation to policy directions. Joffe reminds us, with reference to the informal economy in Southern Africa, that cultural and creative workers, as with many other informal workers "relate to the state and capital NOT through the wage but through a variety of forms of self-employment, own account work (freelance), and work as contributing family members[121]," and that the impact of informality is felt most keenly where agency and representation is absent: by women, refugees or migrants, by poorly educated, rural communities. Joffe suggests seven interventions for consideration for formalisation in the Global South:

More data and clear definitions; making regulation simple, transparent and appropriate; labour relations and social protection for informal

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119 Hickling Gordon, 72.
120 Hickling Gordon, 72.
121 Avril Joffe, "Public Policy for the informal cultural economy: lessons from the global South," Presentation, University of Antwerp, 2021.

cultural practitioners; protecting IP and meeting compliance requirements; increasing access to public infrastructure—both physical and virtual; the importance of intermediaries and support structures; and rethinking public procurement.

A significant portion, if not the outright majority of Jamaican cultural and creative output and activities, originate in the least resourced geographical areas of Jamaica. This is where the majority of informal creative activity takes place, within informal groupings of practitioners. It is important to deepen and broaden research into the relationship between the cultural and informal economies in Jamaica, particularly in light of the pandemic and the government's emphasis on entrepreneurship in relation to the related issues of inclusion, inequality, diversity and decolonisation that manifest in tangible ways in governance, financing and cultural and creative ecosystem development.

7. **The Status of the Artist:** Not enough research has been conducted which privileges inquiries into the status of the artist and a decent work agenda for the CCS. Of importance is the focus of the Action on Community Development with the culture and creative ecosystem at core. There is a glaring data gap in Jamaica's holistic examination in the role of culture in community development and the achievement of Sustainable Development Goals (SDGs). The need for sustained cultural activity across communities and the recognition and inclusion of creative workers within communities will be a significant element of the thematic interest of the action. The focus on the status of the artist within select communities will be an important unit of analysis for the research.

8. **Statistical Challenges and Data Driven Decision Making**

Good, comprehensive data is required to evaluate and establish implementation plans for measures to develop the Kingston UNESCO Creative City of Music and generally for the development of the CC ecosystem policy. Without it, largely, policy and legislation are being articulated and enacted from a subjective place of analysis. A National Assessment of Jamaica's Statistical System has been conducted under the auspices of the UN's Partnership in Statistics for Development in the 21st century,[122] which identified significant weaknesses in the information system needed to monitor the Medium Term Frameworks (MTFs). Gaps identified for the 2015-2018 MTF include inconsistent data, measurement issues, a lack of timely data, unavailable data or data sources unaware of their function to supply such data.[123] The most significant issue flagged by the STATIN itself is Jamaica's decentralised statistics system and the absence of a coordinated, systemized standard at the national level for collecting data.[124] Notwithstanding the chronic under-resourcing of the National Statistical Organisation, STATIN remains one of the region's most robust institutions for statistics and data capture, having been one of the first countries in CARICOM to synchronise with the SNA 2008, as well as indigenizing the International Standard Industrial Classifications (ISIC), which refers to the Jamaica Industrial Classification (JIC) beginning in 1967 and the International Standard Occupational Classification (ISCO) which refers to the Jamaica Standard Occupational Classification (JSOC) beginning in the 1970s.

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122 Paris21. 'National Statistical System Assessment: Jamaica', Statistical Institute of Jamaica, 2018.
123 Paris21, 'NSS Assessment', 18-19.
124 Carol Coy, "STATIN Preparing National Strategy for Development of Statistics." Jamaica Information Service (JIS). July 9, 2017, www.jis.gov.jm/statin-preparing-national-strategy-development-statistics/RSDS.

While there is still little agreement on the existing data and any subjective analysis to develop a methodology for measuring the creative industries,[125] it is important to 'start where you are' in keeping with the phase of development of existing systems. Several countries have begun their cultural economic development processes by engaging in processes of mapping.[126] The purpose of CCI mapping varies widely from country to country, sometimes focusing on a whole country, or more narrowly on a specific cultural locale or sub-sector of the locale.[127] The British Council's "Mapping the Creative Industries" Toolkit is widely used as a methodological framework to "provide analytical methods for collecting and presenting information on the range and scope of the creative industries"[128] as well as a foundation for assessing the economic potential of these sectors, particularly in jurisdictions where the cultural and creative sectors are not yet comprehensively understood. These have been examined, and where necessary, elements have been considered useful. Additionally, processes have been developed to analyse the phenomenological data through thematic analysis.

The focal data gaps in the cultural and creative ecosystem research serve as indicators for the examination of Kingston as a UNESCO Creative City of Music. It is in these contexts that the mapping of this locale was embarked upon. The process began with identifying policy gaps for the locale.

Policy Gaps: Kingston UNESCO Creative City of Music

The following Policy gaps were identified for the optimization of the Kingston UNESCO Creative City of Music. The deep blue section of the table indicates the placement of the NOC activity.

125 Avril Joffe, 'Cultural Sector Mapping Using Data for Policy making', Presentation to UNESCO Capacity Building Programme, Africa, 2012.
126 Joffe, 'Cultural Sector Mapping', 2012.
Mapping is a valuable tool that is widely used in the developed world: such as in the UK, Canada, USA, Hong Kong, New Zealand, Australia, and also in developing countries like: Colombia (2002) and South Africa (2008). For instance, Colombia developed a handbook "Guide to producing Regional mappings of the Creative Industries" (in Spanish and English), and has guidelines for the creative mapping process. Since 2002, the United Kingdom has produced yearly Creative Industries Economic Estimates using comprehensive survey data collected by the Office for National Statistics (ONS), with regular updates and consistent data on the activity of creative industries.
127 Snowball further indicates that this specific methodology is used to provide greater visibility to the sector by demonstrating both the cultural and economic values generated; to benchmark the progress of CCI firms against other firms, to plan ahead in terms of marketing and distribution and to improve collaboration and networking through the identification of strategic clusters; to lobby for support by industry organisations or institutions and to provide evidence of their value and economic importance; to identify areas of potential growth and development by government departments and policy-makers and to shape strategic interventions; and to track progress over time and to analyse emerging developments in the sector.
128 BOP Consulting, 'Mapping the Creative Industries: A Toolkit', British Council's Creative and Cultural Economy Series, British Council, 2010. 23.

Gap Analysis
Research, Policy, & Implementation Agenda
KINGSTON: Creative City of Music
K:NOC / South Star Cultural and Creative Ecosystem Research Checklist

	Philosophy Ethos, Brand and Positioning	Ideology Political Economy	Economy Economic Framing	Governance Policy, Legislation Plans and Programme	Operations Ecosystem
Activities	Culturally-specific approach to Kingston's Cultural and Creative Ecosystem and social agenda	Political Economy positioning of Creative City Kingston in Jamaica in relation to CC policy and legislation planning	Municipality Plan and Budget Financing Creative City Development in keeping with national policy and legislation	Municipal Policy Audit & Design CC Governance Structure, resources, proposition	Implementation
	Cultural Studies / Philosophy Research Ethos of Kingston's as a Creative City of Music	Political Economy and Kingston's Creative legacy	Design KMA CC Statistical classification matrix and metrics for recording	Strategic Creative City Plan and Budget	Civil Society Subsector plans for the municipality
	City branding, positioning, and plan	Current status and direction to include subsectors, and in particular 'indigenous industries, products - Sound Systems - Dub plates and Specials - Studio Culture	Economic Impact Assessment KMA; CC Sector, all subsectors. (Uniform Methodology of JBDC EIA)	Audit and Plan Infrastructure by spatial unit - by community across the KMA	Mapping: Stakeholders' Presence Stakeholders 'intersections Subsectors, industries, institutions, activities Pods and Projects within the Municipality Economic Mapping, Policy Mapping
	Cultural and Creative Diaspora Linkages - Kingston - to the World' - trajectory and contemporary	Sustainable development of CCs in the KMA	CC Financing Programmatic Activities Situation Analysis Gap analysis Needs analysis	Strategic Plans Subsector-driven Implementation Plans and White Papers for subsectors, industries within the KMA	Research agenda to be developed
	Culturally-specific subsector and Industry Ethos, intersections and linkages; Civil Society Driven for Kingston: Creative City of Music		Operations Research - Kingston specific Optimising Intellectual Property + Collecting Societies	Management plan, sustainable financing and maintenance and preservation of Creative Districts and Entertainment Zones in the KMA	Infrastructure plan
	Continued ethnomusicological research		Linkages Assessment	Regulatory environment - night noise, entertainment districts fees	Status of the Artist Considerations
				Survey and Case Studies to frame Enabling Environment matrix	Diaspora Strengthening
				Cross cutting mechanism for Municipal policy effectiveness	Integrated Marketing Communications Plan
				Gap Analysis Municipal CC Research Agenda	

Gap Analysis
Research, Policy, & Implementation Agenda
KINGSTON: Creative City of Music
K:NOC / South Star Cultural and Creative Ecosystem Research Checklist

	Philosophy Ethos, Brand and Positioning	Ideology Political Economy	Economy Economic Framing	Governance Policy, Legislation Plans and Programme	Operations Ecosystem
Activities				Audit and Plan Intra, Inter, Extra Communication effectiveness within the municipality	CC Cartography and Community Surveys Total Ecosystem Cartography Composition by Geographic Units Community to Parish
			CC Economy Themes Rethinking Formalisation Financial Inclusion in Jamaica's Cultural and Creative Ecosystem	Towards an Enabling Policy Framework Civil Society Participation Status of the Artist Status of infrastructure Status of industry Status of Policy Transparency Sector Facilitation Towards an artist-focused, inclusive, representative cultural policy and legislation	Ecosystem Themed White Papers and Strategic Plans on Thematic Priorities CC Ecosystem Community Mapping and Cartography Policy Impact Assessment Pandemic Impact + Rebuilding Decent Work Assessment for artists and creatives Digital ecosystem audit Financial Inclusion surveys Access to finance Infrastructure Audit and Implementation Plan(s) Intra, Inter and Extra Sector Communication Research Agenda Diversity EU-Jamaica Relations Sub-sector profiles And research projects Civil Society and Advocacy Inclusion Fragmentation Rights and freedoms Diversity Resilience Significant Perceptions Formalisation Education and Training Agenda

K:NOC / KINGSTON: CREATIVE CITY OF MUSIC

Kingston as a Cultural and Creative Locale

Kingston, Jamaica's capital and the largest of its three cities, is the focus of the K:NOC Action, and is referred to as its 'locale'[129]. The **Kingston Metropolitan Area** was named a UNESCO Creative City of Music in 2015. Kingston comprises two local government bodies that were amalgamated in 1923. The amalgamation with St. Andrew resulted in the formation of what is now known as **the Kingston and St. Andrew Municipal Corporation (KSAMC)**.

Located on the south eastern end of the island, the city of Kingston, also known as 'the corporate area,' is the smallest parish on the island but it is also the most densely populated of Jamaica's fourteen (14) parishes[130]. This is ostensibly the locale of the ecosystem to be reviewed by this Action, Kingston: Networks of Culture. Kingston has a population of 660,000 inhabitants.

Kingston and St Andrew are also known as 'Uptown Kingston' and 'Downtown Kingston,' respectively. The imaginary line of geographical division that separates the two also translates to perceptions and realities of socio-economic division.

Also known as the cultural capital of Jamaica, and sometimes described as the Cultural Capital of the Caribbean, Kingston and its metropolitan area (the KMA) has been cited as the space from which Jamaica's indigenous music, from Reggae, its progenitor forms of mento, ska dub and rocksteady, and subsequent musical genres with reggae formulations at their core—such as hip hop, dancehall, reggaeton and others—first emerged.

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129 NOC utilises the ecosystem concept used to describe biodiversity in the environment in order to describe the integrated cultural and creative environment within nations and their community units. The ecosystem approach to CCIs recognizes the interaction, integration and interconnection of individuals, organizations, and activities within a complex cultural and creative network. It is antithetical to seeing the subsectors of the cultural and creative industries as pillars, instead viewing each of them as linked nodes within a dynamic network.
130 'Kingston & St Andrew Municipal Corporation (KSAMC)', Ministry of Local Government and Rural Development, https://www.localgovjamaica.gov.jm/local_govt_entity/kingston-st-andrew-municipal-corporation-ksamc/.
Kingston is approximately 11,574.7 persons per sq. km (4,469) per sq. miles), while in St. Andrew it is 1,907 persons per sq. km. (1,885 per sq. mile).

> *"...Kingston stands as a primary location in Jamaica where specific urban cultural resources exist and are brought to life in diverse ways...there is the utilisation of historic sites like Devon House and Port Royal and the existence of multiple art galleries and related locations. In addition, the role of Kingston is central in the development and showcasing of multiple cultural products around particular areas of our indigenous culture such as language, comedy, fashion, food, dance, sports, visual arts, performing arts, literature and so many others."*
>
> *Donna Hope*

Kingston of old and in the present is famous for its 'lawns', dance 'halls'[131] and dances; entertainment spaces in which an eclectic mix of sound systems and live performances provide patrons with the music of Kingston and all of Jamaica. Campbell[132] indicates that in Jamaica's 20th century rural-urban drift, creative minds such as famous reggae and dancehall artists Bob Marley, Peter Tosh, Tony Rebel, Coco Tea, Barrington Levy, Capleton, Ninja Man and I-Octane, among others, migrated to the capital where they first launched their careers. As such, "the contribution of Kingston to the legacy of Jamaican music is undeniable and despite the growth and development of other cities like Montego Bay, Kingston still continues to be the mecca for creative minds.[133]"

The city provides an arterial network of music making, where folk practice and classical instruction, performance and publishing meet contemporary production and presentation.

Recording studios, music video locations, fashion and street food niches, streetside and covered dance studios, conservatories, orchestras and choral movements are all now supported by innovative, 21st century digital shared spaces that complete the complex, integrated cultural and creative ecosystem of the KSA.

Multi-talented creative workers multitask across specialist cultural and creative sectors, subsectors, industries, Institutions and enterprises.

CREATIVE CITY KINGSTON

In 2015, Kingston was designated a UNESCO Creative City of Music[134], "...one that incorporates cultural diversity and creative innovation within its boundaries so that its cultural resources are exploited and expressed...[and] in which particular urban cultural resources exist and are used to express the cultural specificity of that city and by extension its people and country.[135]" Kingston, Jamaica's capital city, is renowned for its contributions to music. This was cemented by its 2015 designation as a UNESCO Creative City of Music.

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131 "Lawns and Halls" refer to outdoor and indoor spaces across Jamaica where popular, grassroots music events were held in the early twentieth century. In Kingston, the Progressive lawn, King's Lawn, and Forrester's Hall were named amongst the dance spaces. The term dancehall is still used spatially, but the term 'lawns' is seldom heard in contemporary exchanges.

132 Curt Campbell, "Kingston Stands Unrivalled - Creative City Concept Still Strong within Jamaica's Capital," jamaica-gleaner.com, January 29, 2013, https://jamaica-gleaner.com/gleaner/20130129/ent/ent1.html.

133 Donna Hope quoted in Campbell, "Kingston Stands," 2013.

134 UNESCO, "Kingston | Creative Cities Network," en.unesco.org, 2015, https://en.unesco.org/creative-cities/kingston.

135 Donna Hope quoted in Campbell, "Kingston Stands," 2013.

An instrumental part of Jamaica's global identity is its contribution to music. Though often mistakenly relegated only to music from the legendary Robert 'Bob' Nesta Marley, Jamaica's music catalogue is much larger and transcends beyond the aforementioned misconception. UNESCO recognizes Kingston as being the breeding ground of six musical genres: reggae, mento, ska, rocksteady, dub, and dancehall. "Music is deeply etched into the historic foundations of Jamaica with its capital, Kingston, leading the way with urban development, legendary musicians, world-famous recording studios, and production houses have made Kingston an internationally renowned centre for music-making."

Jevaughn James, 'Advancing Createch in Kingston Jamaica - A UNESCO Creative City of Music: Cultural District Concept', 2022.

As a Creative City of Music, Kingston enjoys several benefits. Ongoing conversations on the development of Kingston as a City of Music include: knowledge sharing; partnerships and mutually beneficial initiatives between Kingston and other cities; copyright and legislative protection; the provision of dedicated entertainment spaces for both creatives and audiences to converge; and culture as a vector for social inclusion. The designation of Kingston as a Creative City of Music ushers the entire country toward the creation of a sustainable music economy[136].

"As part of its mandate as a creative city, the governing bodies aim, in Kingston, to use music as a driver for sustainable urban development. To use music and the arts to revitalise inner communities and revive derelict buildings for use as creative incubators to promote appreciation for creativity and create outlets for creative expression. This concept recognizes these goals as instrumental to furthering the creative city.[137]"

A significant policy focus of Kingston as a Creative City of Music is engendering partnerships within Kingston's cultural and creative ecosystem and conversations within this consider specific activities such as: the Oral History & Archiving Project; Jamaican Euro-classical music composer archives; Jamaica Music Museum; mobile apps and geotagging projects; film and music conferences; cultural, creative industry & entertainment policy; and support for NGO and private sector initiatives[138].

Listed as the significant cultural assets of Kingston are[139]:

1. Role of Music Foundations in Kingston:

    a. Music has an integral role in the historic foundations of the city (urban development, spirit, and creative culture)

    b. Varied influences on Kingston's music: from indigenous, and folk through popular to classical.

    c. Kingston's sound system culture and its influence on multiple genres of music globally

    d. Music's significant role in urban migration

2. Economic Importance and Dynamism

    a. Licences for events

136 Michael Hendrickson and Sonjah Stanley Niaah. 'The film and music sectors in jamaica: Lessons from case studies of successful firms and ventures. A Study on the Creative Industry as a Pillar of Sustained Growth and Diversification', United Nations, 2018.
137 James, 'Advancing CreaTech', 1.
138 Wilkinson McDaniel (2018)
139 'Application Form - 2015 Call for Applications,' UNESCO Creative Cities Network.

  b. Copyright sector

  c. Sound system federation of more than 200 sound systems

  d. Important source of Foreign exchange

3. Fairs, Conferences and Conventions

4. Festivals and Large-Scale events

5. Mechanisms, courses and programmes

6. Lifelong learning: tertiary education, vocational schools, and specialist institutions

7. Research Centres

8. Spaces and centres for the creation, production and dissemination of activities, goods and services in the creative field

9. Facilities and cultural spaces

10. Projects and activities

11. Professional civil society and non-governmental organisations

12. Municipal policies and measures

13. Support Mechanisms, programmes and projects

14. International Cooperation initiatives and partnerships

15. Facilities and infrastructure

The Creative City designation, by design, was linked to overall National Development Plans, that[140] reflect and share aligned local, regional and global policy objectives particularly: National Outcome #12: Internationally Competitive Industry Structures: Cultural and Creative Industries; Sector Strategy: Advance Work to make Kingston the Creative Capital of the Caribbean and SDG 11: Sustainable Cities and Communities.

By joining the UNESCO Network, Jamaica committed to use the creativity of its people specifically in music, as a driver for sustainable urban development. In particular, the city is focused on using music and the arts to redevelop and revitalise Kingston's inner city communities often referred to as downtown Kingston. This will be achieved through conversion of derelict buildings for use as creative incubators and performance venues to promote appreciation for creativity and provide outlets for creative expression; foster cultural exchanges and interaction by and among Kingston

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140 The Vision 2030 Plan seeks to facilitate policy and programmatic convergence with the UCCN objectives and to develop and support pilot projects that have as their focus the funding of creative projects and programmes.

and other network members through participation in programmes and initiatives that impact the creative sectors; develop and support pilot projects that have as their focus community building through the arts; facilitate policy and programmatic convergence with the National Development Plan, National Cultural Policy, Cultural and Creative Industries Policy to achieve network missions and objectives.

Coleen Douglas, "Marketing the Music City, Kingston," Jamaica Observer, December 26, 2021.

The Kingston municipality further states its aims as including using music as a lever for social inclusion and social change: "UNESCO records plans for the city to place emphasis on building capacities and creating opportunities to combat youth unemployment in inner-city communities[141]. The idea is to use creative expression as an avenue for development and creating a sense of community." Given Kingston's reputation for crime, a major focal area of Jamaican life, Zones of Special Operation (ZOSO) and a State of Emergency had been shown to have a positive impact on violent crime across the island[142]. The total number of persons murdered in Kingston and St. Andrew from January 1 to May 27, 2021 was 234[143].

ZOSO as a social programme and crime prevention strategy was meant to clear the communities of persons who are more likely to engage in criminal activities, in particular homicide. In Kingston, they hold and secure inner city communities with armed forces, and seek to build and expand the social capital and infrastructure of these communities to improve the livelihoods of their residents. Under this programme, nightlife was suppressed and a large subsection of the night-time business was impacted. Entertainment businesses that once flourished from revenues earned from night-time entertainment were encouraged to open in the daytime, dependent on the restrictions that prevailed at times when there were diminished numbers of consumers[144].

Where creativity meets technology, several announcements have been made by the central government regarding the intention to make the country into an innovation and technology hub[145]. For example, plans were announced to advance technology and innovation on the island through the teaching of coding in public schools across all grades and the construction of six new STEM schools. However, it was noted that pursuant to these goals, the citizenry will need to have a command of foundational literacies, which is challenging based on the country's Digital, Media and Information Literacy Rates. A study intended to measure, mitigate and address this challenge nationally took place in 2020 and 2021 at the University of the West Indies[146]. In this study, it was noted that there have been further announcements in technology along with its connection with sectors like finance and education; however the gap between technology

141 James, 'Advancing CreaTech', 5.

142 Andre Haughton, "ZOSO Good for Crime, Bad for Business and Social Livelihood | Department of Economics," University of the West Indies - Mona, 2020, https://www.mona.uwi.edu/economics/news/20202020/0505/0606/briefing-zoso-good-crime-bad-business-and-social-livelihood.

143 Jamaica Constabulary Force, "Serious Crimes Report for January 1 to June 20, 2022 and Comparative Period 2021," 2022, https://jcf.gov.jm/stats/. The comparative statistics will be discussed in the conclusions.

144 Jamaica Constabulary Force. "Serious Crimes Report for January 1 to June 20, 2022 and Comparative Period 2021." 2022. https://jcf.gov.jm/stats/.

145 James, "Advancing CreaTech," 7.

146 Mona School of Business, "Inception Workshop: Digital, Media and Information Literacy Skills Framework | Mona School of Business & Management," www.mona.uwi.edu, 2021, https://www.mona.uwi.edu/msbm/news/inception-workshop-digital-media-and-information-literacy-skills-framework.

and the cultural and creative industries remains significant. This is further challenged by perceptions of the absence of an enabling environment for the creative sector, even as resources are allocated for the technical sector which makes it difficult to link the cultural and creative industries to sectors like technology in a tangible manner. This consequently impairs the ability to develop a technologically advanced creative city, which has led to the development of private sector and NGO programmes across the city to enjoy creativity, technology and innovation[147].

> Local brand owners in Jamaica will be able to start using the Madrid System to protect their trademarks in the 125 territories of the System's other 109 members by filing a single international application and paying a single set of fees. With its straightforward designation process, foreign businesses and trademark owners can, from March 27, 2022, seek trademark protection through the Madrid System when selling their products and services in Jamaica.
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> WIPO, "Jamaica Joins the Madrid System," 2022.

Another long-standing issue facing cultural and creative business and recreation in Kingston is the regulatory mechanism of the Noise Abatement Act, a widely contested and controversial piece of legislation. On one hand, the restrictions that the Act enables affect the extent to which the night economy of the Creative City can operate, which further affects the aspiration for the production and performance of music that is associated with global creative cities of music and cultural districts. On the other hand, the issue of nuisance and noise is taken into account. Often, battle lines are drawn regarding its implementation, and social-class disparities identified in this regard, particularly where popular culture is most affected. The result of this has been the process of identification of Entertainment Zones.

The Palisadoes strip in Kingston was approved by the National Environment and Planning Agency as Jamaica's first entertainment zone in December 2015[148].

147 Andrea Dempster Chung, "10 Cool Createch Companies to Watch || Kingston Creative," Kingston Creative, November 19, 2020, https://kingstoncreative.org/2020/11/19/10-cool-createch-companies-to-watch-andrea-dempster-chung; Renae Edwards quoted in James, 'Advancing Createch', 15.
Three of these programmes include Halls of Learning which offer classes in Robotics & Coding, AP Computer Science, as well as summer camps and outreach programmes to provide children with early exposure to the STEM/STEAM field. Building on a vision developed through the Reuters Digital Vision Fellowship at Stanford University, Halls of Learning are also the national organisers of the World Robot Olympiad™ Jamaica, the Oxford University Computing Challenge Jamaica, the BEBRAS Jamaica Challenge and the AKSF Kangaroo Maths Challenge, some of the largest youth competitions in the world. Through our collaborations with the SEPROD and Musson Foundations, we have also offered free training in Robotics & Coding to hundreds of teachers. The Kingston Creative Createch programme uses technology to drive the growth of the creative economy, opening up access to new business opportunities and accelerating the export of creative products and services. The objective of this 36-month partnership between Kingston Creative and the IDB is to increase market access for Jamaican creative entrepreneurs by providing global market access, new digital platforms, technologies, training and capacity-building to add economic and social value to cultural assets through the development of new business models. Ten prominent CREATECH companies to watch were identified by Kingston Creative in 2020, noting a growth trend in this sector.
iCreate institute also focuses on two key areas that cause creativity and technology to merge: capacity building and infrastructure (by extension, creative production). iCreate engages with international partners to enhance its offerings and create practical knowledge, in addition to theoretical knowledge, that is directly able to advance the creative city. The institute is also seeking accreditation for several of its programs to add weight to its students' qualifications.
148 Syranno Baines, "Crawford Calls for Entertainment Zones within Communities," Jamaica Gleaner, November 26, 2017, https://jamaica-gleaner.com/article/news/20171126/editors-forum-crawford-calls-entertainment-zones-within-communities.

"In accordance with the law, (the Noise Abatement Act) no person ought to sing, play a musical or noisy instrument or operate or cause to be operated a loudspeaker, microphone or device for the amplification of sound from any private premises or public places at any time of day or night where the sound is audible within one hundred metres of the source of that sound. The sound referred to is further qualified. If it is reasonably capable of causing annoyance to people during specified hours beyond the one hundred metre distance in the vicinity of any dwelling house, hospital, nursing home, infirmary, hotel or guest house then that sound is presumed to cause an annoyance. The periods referred to are between 2AM and 6AM on Saturday and Sunday, and Midnight to 6AM during the rest of the week. In addition, loudspeakers are not to be operated later than 11PM at a public meeting and no later than midnight at a political meeting held between nomination day and the day next but one before Election Day. The above times are of course, subject to restrictions currently imposed via Orders under the Disaster Risk Management Act.

Rachel McLarty, "The Noise Abatement Act, a Conduit for Anti-Social Behaviour?," Myers, Fletcher & Gordon, 2021.

Intellectual Property is another important area of consideration for a Creative City. In 2015, the city made significant amendments to their Copyright Act by adding a clause on the protection of digital works. Since then, the country has signed and ratified the Madrid protocol.[149] This allows trademark registration to be submitted in several countries through a single application, which can potentially benefit CCIBs when paired with a city twinning initiative, allowing practitioners to operate under one name in different global creative cities.[150]

WIPO further indicates that the Madrid System makes it possible for creatives to apply for trademark protection in up to 126 territories by filing a single international application with the national or regional IP office of a Madrid Union member. With the Madrid System, the process of multinational trademark registration is streamlined through a single application and management process.[151]

Evaluating Kingston, UNESCO Creative City of Music

As many of the issues impacting the broader Jamaican CC ecosystem including policy fragmentation at the central government level also affect the municipality, the research gaps for cultural and creative ecosystem policy articulated earlier were revisited in order to formulate areas of interest in the mapping of the Kingston UNESCO Creative City of Music.

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149 World Intellectual Property Organization (WIPO), "Jamaica Joins the Madrid System," 2022, https://www.wipo.int/madrid/en/news/2022/news_0001.html.
On December 27, 2021, the Government of Jamaica deposited its instrument of accession to the Madrid Protocol, making it the 110th member of the Madrid System, which now covers 126 countries. The Protocol entered into force for Jamaica on March 27, 2022.
150James, "Advancing CreaTech," 16.
151 WIPO, "Jamaica Joins the Madrid System," 2022.

One of the early points of interest is the KMASC, which as a subject area of the Ministry of Local Government, is the presiding government agency for matters dealing with the UNESCO Creative City. As a tourism cultural centre, the Ministry of Tourism and its agencies the Tourism Enhancement Fund (TEF), the Jamaica Tourist Board (JTB), and the Tourism Product Development Company (TPDCO) play significant roles in planning for and resourcing development activities within the KMA.

The Urban Development Corporation, a subject area of the Office of the Prime Minister and the range of MDAs within the Ministry of Culture, Gender, Entertainment and Sport, and the Ministry of Industry, Investment and Commerce, among others, also have central roles to play in planning and public service delivery for the Creative City.

Analysts suggest that at the municipal level, similar to at the central government level, there is a need to integrate stakeholders or have stakeholders integrate themselves in the management of the municipality's Creative City furtherance, as "the designation needs to be supported by players in the business, and arms of government. The Creative City Steering Committee is only a driving force working to manifest the proposed objectives of the application. Other stakeholders must play their part as we move to build global partnerships."[152] This has implications for both local/central government coordination, the purposeful management of the KUCCM, and their relationships with the varied stakeholders in the ecosystem going forward.

The K:NOC Action evaluated the available literature and subsequently created a grid of concerns, issues and gaps to be applied to the Creative City of Kingston. These cross-cutting issues will be considered in the development of research objectives for the study. However, the study is concerned with mapping stakeholders' presence, ecosystem intersection and their value added.

The evaluation of the Kingston UNESCO Creative City of Music was completed through the adoption, adaptation and application of the Cultural and Creative Cities Monitor,[153] a European Union tool used to assess Creative Cities, which is further outlined in the Methodology Chapter.

The NOC team took note of the EU's Cultural and Creative Cities Monitor's conceptual framework and indicators[154] to develop the methodology for **The Action.**

152 Sonjah Stanley Niaah, "Kingston Was Designated a UNESCO 'Creative City,' but What Does That Mean?" diG Jamaica, 2016, http://digjamaica.com/m/blog/kingston-was-designated-a-unesco-creative-city-but-what-does-that-mean/2/.

153 European Union, 'Composite Indicators and Scoreboards', Brussels: European Commission - Joint Research Centre, 2019, https://composite-indicators.jrc.ec.europa.eu/cultural-creative-cities-monitor.

154 European Union, 'Cultural and Creative Cities Monitor', 2017, https://publications.jrc.ec.europa.eu/repository/bitstream/JRC107331/kj0218783enn.pdf.

Three major facets of cities' cultural, social and economic vitality[155] were particularly applicable. They were adopted and adapted to provide discursive analysis of the cross section of the database, case studies and thematic intersections presented as mapping data for the K:NOC study.

- **Cultural Vibrancy** measures a city's cultural 'pulse' in terms of cultural infrastructure and participation in culture in the Creative Cities Monitor. For K:NOC, it is applied to the **Status of the Artist** in the Kingston UNESCO Creative City of Music.

- **Creative Economy** captures the extent to which the cultural and creative sectors contribute to a city's economy in terms of employment, job creation and innovation in the Creative Cities Monitor. For K:NOC, it is applied to the **Status of the Music subsector** in the Kingston UNESCO Creative City of Music.

- **Enabling Environment** identifies the tangible and intangible assets that help cities attract creative talent and stimulate cultural engagement in the Creative Cities Monitor. For K:NOC, it is applied to the **Status of Infrastructure** in the Kingston UNESCO Creative City of Music.

A baseline for Kingston as a UNESCO Creative City of Music was developed using this methodology in part, which is reflected in the tables below.

Adaptation of the Creative Cities Monitor Analytical Framework			
Creative Cities Monitor	Status of Infrastructure	Status of Music subsector	Status of the Artist
Analytical Structure (Creative Cities Monitor)	**Cultural Vibrancy:** • **Cultural Venues and Facilities** - Sights and landmarks - Museums and art galleries - Cinemas - Concert and Music Halls - Theatres • **Cultural Participation and Attractiveness** - Tourist Overnight Stays - Museum Visitors - Cinema Attendance - Satisfaction with cultural facilities	**Creative Economy** • **Creative and Knowledge based jobs** - Jobs in arts, culture and entertainment - Jobs in media and communication - Jobs in other creative sectors • **Intellectual Property and Innovation** - ICT Patent applications - Community design applications • **New Jobs in Sectors** - Jobs in New arts, culture and entertainment enterprises - Jobs in new enterprises and other creative sectors - Jobs in new media and communication enterprises	**Enabling Environment** • **Quality of Governance** - Quality of governance • **Creative Knowledge Based Jobs** - Graduates in Arts and Humanities - Graduates in ICT - Average appearances in university rankings • **Openness, Tolerance and Trust** - Foreign graduates - Foreign-born population - Tolerance of foreignness - Integration of foreigners - Trust in people • **Local and International Connections** - Accessibility to passenger flights - Accessibility by Road - Accessibility by Rail

155 European Union, 'Cultural and Creative Cities Monitor Second Edition - Questions and answers', Brussels: European Commission, 2019, https://ec.europa.eu/commission/presscorner/detail/en/qanda_19_6005.

The status of the artist, infrastructure and music subsector for Kingston UNESCO Creative City of Music are delineated on the next page in accordance with this structure.

1. Enabling Environment / Status of the Artist

Ten sets of actions are required for the provision of an enabling environment for cultural and creative practitioners. These were first delineated in "Creative Jamaica, Creative Economy Policy Framework. Towards an Enabling Environment for the Sustainable Development of Thriving Cultural and Creative Industries."[156] These included Institutional Strengthening; Research and Development; Marketing and Nation Branding; Domestic, Regional and International Trade; Education and Training ; Business Development and Supportive Financial Structures; Intellectual Property Rationalisation; Incentives and Taxation; Governance Structures; and Facilities and Infrastructure. Considerations for digitization and digitalization were added in 2022. These are used in this study as the foundational establishment as units of analysis in tandem with the International Labour Organisation's (ILO) parameters of decent work as "productive work for women and men in conditions of freedom, equity, security and human dignity."[157] In general, work is considered decent when it pays a fair income, it guarantees a secure form of employment and safe working conditions, it ensures equal opportunities and treatment for all; it includes social protection for the workers and their families, it offers prospects for personal development and encourages social integration, and workers are free to express their concerns and to organise

Quality of Governance	Quality of governance	**Macro Policy - Jamaica:** A policy review process has been in place since 2014. Recent references to this process follow. The general consensus has seemed to coalesce around the need for holistic, strategic cultural and creative policy and legislation and a masterplan for the sustainable development of the sector. The greatest criticism of Jamaica's policy has been its description as 'fragmented'. These are a few comments from the sector in this regard. **Jamaica Information Service:** The Government is in the final stages of crafting the National Policy on the Culture and Creative Economy of Jamaica. The policy will, among other things, establish the enabling environment within which the creative sector will operate.[158]

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156 Hickling, "Creative Economy Policy', 40.
157 European Union, "Employment and Decent Work," European Commission, October 14, 2019, https://ec.europa.eu/international-partnerships/topics/employment-and-decent-work_en#:~:text=The%20International%20Labour%20Organization%20.
158 Chris Patterson, "National Culture Policy Being Finalised – Jamaica Information Service," jis.gov.jm (Jamaica Information Service, May 16, 2019), https://jis.gov.jm/national-culture-policy-being-finalised/.

		Nordicity: "In order to merit public support, a clear understanding of the cultural and creative industries and their cultural and economic contribution must be presented and absorbed by those in decision-making positions."[159]
		Howard: "A comprehensive cultural policy is urgently necessary to guide the process of converting our cultural production, tradition, lifestyle and art into
		a critical component of our export portfolio."[160]
		
		Hickling: "The time has long come to close the gaps in the culture and creative industry policy. It's not good enough to have six direct and six indirect ministries providing oversight of elements of creative government policy and legislation."[161]
		
		Micro Policy - Kingston Creative City of Music:
		The Development of Kingston as a Creative City of Music is governed by an action plan for the 2020 - 2023 period. Listed as its proposed inclusive and collaborative activities are:
		
		• Buildout of four entertainment zones
		• Completion of three medium term projects
		  - Renovation of the Ward Theatre
		  - Renovation of National Heroes Park
		  - Developing Hubs of Creativity and Innovation
		• Development of an Entertainment Policy
		• Communication Awareness Plan
		  - Greater stakeholder collaborations
		  - Raise awareness of live music by 50%
		  - Raise awareness of the UNESCO designation by 75%
		  - Brand Identity—logo development
		  - Advocacy
		    Promotion

Creative Knowledge Based Jobs	Graduates in Arts and Humanities	**Data not Found**
	Graduates in ICT	**Data not Found**

159 Nordicity, Mapping Jamaica's Cultural and Creative Industries', 8.
Government intervention in recent years has helped to further the development of Jamaica's CCIs, and there is a need for continued and further support. Sector support can be effectively delivered through a combination of interrelated support structures, where one intervention would have a greater impact when delivered alongside others. In order to merit public support, a clear understanding of the cultural and creative industries and their cultural and economic contribution must be presented and absorbed by those in decision-making positions. To realise this objective, ongoing monitoring and evaluation can help provide the necessary information for both policymakers and the industry alike.
160 Howard, "Culture in Development Matrix," 2021.
"A comprehensive cultural policy is urgently necessary to guide the process of converting our cultural production, tradition, lifestyle and art into a critical component of our export portfolio. Actual development can only be realised when our economy achieves a balance of payment equilibrium and when the development needs of ordinary Jamaicans are addressed. The creative industry, through our culture, offers us opportunities to gain actual development and liveable conditions for the majority of Jamaicans. I'm suggesting that the cultural policy should consider the following four policy pillars."
161 Karena Bennett, "Creative Sector Decries Lack of Cohesive Policy," jamaica-gleaner.com (Jamaica Gleaner, September 29, 2019), https://jamaica-gleaner.com/article/business/20190929/creative-sector-decries-lack-cohesive-policy.
The time has long come to close the gaps in the culture and creative industry policy. It's not good enough to have six direct and six indirect ministries providing oversight of elements of creative government policy and legislation. What we need is a ministry department or agency of Government that is dedicated to the convergence of culture and creative policy and legislation," she said at the customs seminar… "It's not enough for there not to be satellite accounts to record revenue earned by the industry. When Buju Banton had his concert that money was most likely recorded under tourism or production. We cannot record what it is we've earned," the consultant added.

	Average appearances in university rankings	Since 2018, the UWI has earned a place among the top universities in the world, and remains the only Caribbean university to make the prestigious THE Rankings lists. Since 2018, the UWI has earned a place among the top 600 universities in the world, the top 40 in Latin America and the Caribbean, and in the top 100 Golden Age University Rankings and Impact Rankings in 2020. The UWI remains the only Caribbean university to make these prestigious lists. EMCARTS is the only college of its kind in the English-speaking Caribbean.
Openness, Tolerance and Trust	Foreign graduates	**Data not Found**
	Foreign born population	10,480 in Kingston and St Andrew[162]
	Tolerance of foreignness	"Jamaica is home to a diverse population of Africans, Chinese, East India, Syrian, Lebanese and Europeans who adhere to various religious and cultural practices befitting the national motto "out of many, one people. Religion and music are intertwined…and music is integral to the Rastafari faith, the only religion to have emerged in the 20th century."[163] Tolerance of foreignness, is, however not an indicator for which data has been identified. This will be further be interpreted in the local context as tolerance of incoming cultural and creative practitioners to work in Kingston/Jamaica
	Integration of foreigners	Data not found. This will be further be interpreted in the local context as integration of incoming cultural and creative practitioners to work in Kingston/Jamaica
	Trust in people	Data not collected. This is a significant indicator that can be used to reference trust levels of stakeholders within the CCS of Kingston/Jamaica. This has been alluded to, anecdotally, as being a challenge to the development of the sector which has led to its fragmentation. Consumer confidence is used as an empirical measure. "Consumers and businesses were more confident about economic prospects in the second quarter of 2021 when compared to the prior quarter, but optimism among both groups still lags pre-pandemic levels. The business confidence index increased to 130.8 points in June, compared to 115.2 points in March 2021 and 115.4 points in June 2020. Consumer confidence increased to 149.8 points from 120.7 points in March 2021 but remained below the 165.2 points recorded in June 2020."[164]

162 Statistical Institute of Jamaica, "Total Local and Foreign-born Population by Parish of Residence," Statinja.gov.jm, 2011, https://statinja.gov.jm/Census/PopCensus/Totallocalandforeignbornpopulationbyparishofresidence.aspx.
163Application Form - 2015 Call for Applications,' UNESCO Creative Cities Network.
164 Steven Jackson, "Consumer, Business Confidence Re-Emerging," jamaica-gleaner.com (Jamaica Gleaner, July 21, 2021), https://jamaica-gleaner.com/article/business/20210721/consumer-business-confidence-re-emerging.

Local and International Connections	Accessibility to passenger flights	Norman Manley International Airport is the arrival port that serves Kingston and St Andrew. It operates 24 hours a day, has 13 aircraft gates, 2 remote stands and 9 passenger loading bridges. • Total Passenger Movements in 2014 – 1,422,978M • Freight (Cargo/Mail) in 2014 – 12,330,941 kgs • Avg. Daily Passengers in 2014 – • Avg. Daily Aircraft Movement – • Generates over 13,000 direct and indirect jobs • 13 scheduled airlines serving many international destinations. • Serves both the business and leisure markets. • Adjacent to Kingston Harbour, the world's seventh-largest natural harbour. • Close proximity to the commercial and cultural capital city of Kingston (20 minutes). • Major economic catalyst for the Kingston Metropolitan Area, economic activity valued at an estimated JA $15.2 Billion (equivalent to 5.6% of GDP). The International airport also exists in close proximity to Port Rocky which was named in 2018. Ironically, in that year, access to the airport was impeded by an entertainment event.[165]
	Accessibility by Road	Kingston has a reasonably sophisticated road network. The department of Roads and Works (Technical Services) has the task of supervising all works in connection with the maintenance and repair of parochial roads according to the provisions of the Parochial Roads Act.[166] It is also fed by a number of highway systems that lead to other parishes in Jamaica, with new infrastructure systems being constructed to increase access by road across the island.[167]
	Accessibility by Rial	The Government began the process of restoring Jamaica's historic railway, announcing plans for the return of service from Montego Bay, St. James, to Appleton Estate [in St. Elizabeth] as a tourism initiative, before they are then going to put back [the route for] Kingston to Montego Bay and eventually [from] Kingston to Port Antonio in Portland.[168]

165 Annie Paul, "Lessons from #Sandz," jamaica-gleaner.com (Jamaica Gleaner, January 10, 2018), https://jamaica-gleaner.com/article/commentary/20180110/annie-paul-lessons-sandz.

166 Local Authorities of Jamaica, "Roads and Works Department | Local Authorities of Jamaica," Localauthorities.gov.jm, 2015, https://localauthorities.gov.jm/administration/roads-and-works-department.

167 Kasey Williams, "Highway Completion Date Extended to 2023," jamaicaobserver.com (Jamaica Observer, September 8, 2021), https://www.jamaicaobserver.com/central/highway-completion-date-extended-to-2023/.

168 Chanel Spence, "Government to Restore Islandwide Railway Service," jis.gov.jm (Jamaica Information Service, March 11, 2022), https://jis.gov.jm/government-to-restore-islandwide-railway-service/.

Status of Subsector - Music

2. Creative Economy / Status of the Subsector - Music

Jamaica's CCIs are composed of a vast and varied population of creatives, freelancers, SMEs, micro-enterprises, workers and support bodies. Nordicity's survey of over 550 CCI stakeholders was used as a baseline estimate of the cultural and creative workforce, which includes creative business owners, artists, freelancers and workers from across the country, providing some insight into the composition of the CCIs. These are indicative statistics that do not reference Kingston only. Because Jamaica's definitions and categories remain fragmented, it challenges the ability to evenly represent the sector/subsector/industry categories.

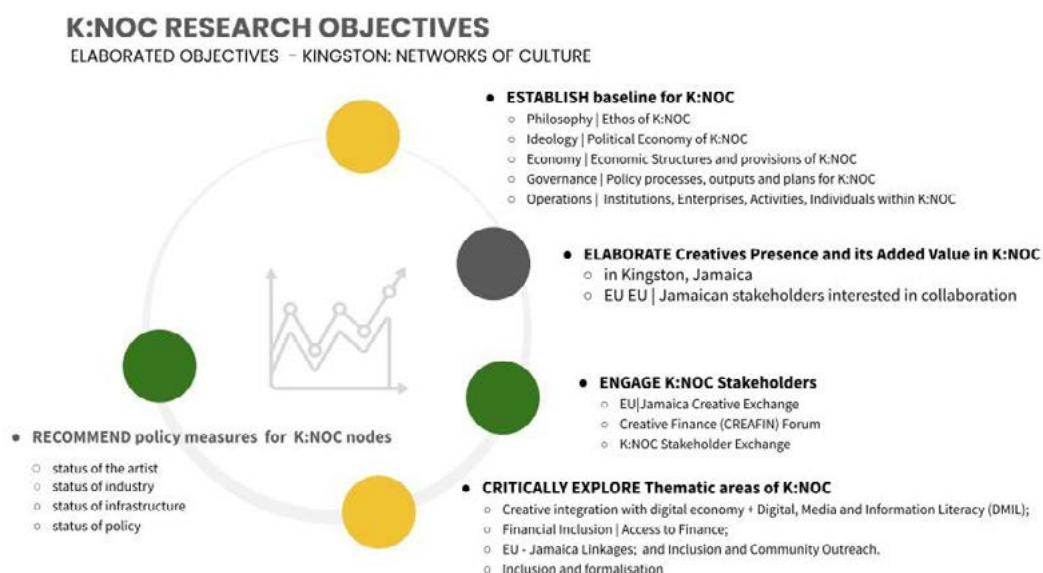|		
Creative and Knowledge based jobs	Jobs in the arts, culture and entertainment	Using Nordicity's categories visual arts (11%), theatre, dance and performing arts (10%); and music (9%); these subsectors/industries account for 20% of Jamaica's CCS
	Jobs in media and communication	Using Nordicity's categories: Advertising and Marketing (8%), Television/broadcast (5%) and film (6%). These subsectors/industries account for 19% of Jamaica's CCS
	Jobs in other creative sectors	Using Nordicity's categories: Design (10%), Gifts and Crafts (8%); Literature and Publishing (7%); Culinary/Gastronomy (3%); Museums, galleries and libraries (2%); Cultural Heritage (6%). These sub sectors account for 36% of Jamaica's CCS
Intellectual Property and Innovation	ICT Patent applications	In all of Jamaica in 2018, 2019 and 2020, 42, 26 and 11 patent filings were made respectively. This has not been disaggregated for Kingston. In those years 24, 14 and ten resident patent applications were submitted; 53, 51, 47 were submitted by non-residents and 16, 12, 1 are categorised as applications from abroad. The last listing of 'patents in force' for Jamaica is in 2017 when 265 were accounted for.
	Community design application	Data not found.
New Jobs in Sectors	Jobs in new arts, culture and entertainment enterprises	Using Nordicity's categories: Festivals, Fairs and Feasts (6%) and Fashion (6%). These sub-sectors account for 12% of Jamaica's CCS
	Jobs in new enterprises and other creative sectors	Using Nordicity's category, Digital media (including video games). This subsector accounts for 5% of Jamaica's CCS
	Jobs in new media and communication enterprises	Please see above.

STATUS OF INFRASTRUCTURE

3. Cultural Vibrancy / Status of Infrastructure

Cultural and creative facilities are often seen as indicators of development and success in societies and cities for the added economic, social and intangible heritage value they provide. They foster a positive city image, enhance urban quality of life. There is a great level of dissatisfaction regarding the issue of cultural and creative infrastructure in Jamaica and in Kingston.

Cultural Venues and Facilities	Sights and landmarks	• World's 7th natural harbour • International trans-shipment port • Norman Manley International Airport • Blue and John Crow Mountains - UNESCO World Heritage Site • National Craft Market
	Museums and art galleries	A mix of national and private, boutique galleries exist across the KMA. While not exhaustive, these include:. • National Gallery • Grosvenor Art and Framing Centre • HiQuo Gallery • Olympia Gallery
	Cinemas	Kingston's Cinema scene is controlled by a single entity, the Palace Amusement Company Limited that has operated in Kingston since 1921. There are two Palace Cinemas in Kingston • Carib 5 with five screens • New Kingston Drive In • Sovereign Centre
	Concert and Music Halls	There are currently no official concert halls in Kingston. Auditoriums in schools and churches are often used as performance spaces for musical and other genres of the performing arts.
	Theatres	• Kingston Little Theatre and the Little Theatre are the primary theatres in use in Kingston. There are also the Sir Phillip Sherlock Centre for the Performing Arts - University of the West Indies and the Theatre in the Round • Dennis Scott Theatre and Amphitheatre- Edna Manley College for the Visual and Performing Arts • Smaller, commercial spaces including auditoria • Historic Ward Theatre (1715) has remained in a state of disrepair for over two decades • Louise Bennet and Ranny Williams entertainment centres
Cultural Participation and Attractiveness	Tourist Overnight Stays	For 2019/20, there were 353,800 international visitor nights in the City of Kingston, accounting for 26.8% of the total visitor nights
	Museum Visitors	Museums were closed due to the COVID-19 pandemic
	Cinema Attendance	Cinemas were closed due to the COVID-19 pandemic.
	Satisfaction with cultural facilities	The insufficiency of cultural infrastructure in Kingston has been a major area of concern to its stakeholders. It is seen as a major impediment to cultural and creative sector development in the KMA. The lack of facilities is coupled with the various states of disrepair of those facilities that are used for multiple applications—many are not fit for purpose or have antiquated applications. The matter of infrastructure is a source of dissatisfaction in the KMA.

RESEARCH QUESTIONS AND OBJECTIVES

To complete the mapping research, the considerations of the situation analysis were used to structure the following objectives of the research as articulated, from which a methodology was designed.

K:NOC RESEARCH OBJECTIVES
ELABORATED OBJECTIVES – KINGSTON: NETWORKS OF CULTURE

- **ESTABLISH baseline for K:NOC**
  - Philosophy | Ethos of K:NOC
  - Ideology | Political Economy of K:NOC
  - Economy | Economic Structures and provisions of K:NOC
  - Governance | Policy processes, outputs and plans for K:NOC
  - Operations | Institutions, Enterprises, Activities, Individuals within K:NOC

- **ELABORATE Creatives Presence and its Added Value in K:NOC**
  - in Kingston, Jamaica
  - EU EU | Jamaican stakeholders interested in collaboration

- **ENGAGE K:NOC Stakeholders**
  - EU|Jamaica Creative Exchange
  - Creative Finance (CREAFIN) Forum
  - K:NOC Stakeholder Exchange

- **RECOMMEND policy measures for K:NOC nodes**
  - status of the artist
  - status of industry
  - status of infrastructure
  - status of policy

- **CRITICALLY EXPLORE Thematic areas of K:NOC**
  - Creative integration with digital economy + Digital, Media and Information Literacy (DMIL);
  - Financial Inclusion | Access to Finance;
  - EU - Jamaica Linkages; and Inclusion and Community Outreach.
  - Inclusion and formalisation

The following questions were submitted to the municipality for response:

1. Master Plan for Kingston as a Creative City of Music: what is the holistic plan? What is the timeline for its implementation?

2. Infrastructure:
    a. What are the plans for parking in downtown Kingston?
    b. What is the update on the Renovation of the Ward Theatre?
    c. Is there an update on the Papine Park project with clear timelines?
    d. Has an inventory of open public spaces been done for Kingston and St Andrew? Is it available to the public, can we have a look at it, and what does it propose?
    e. Underutilised spaces, absence of maintenance of spaces, decaying spaces, and plans in place yet not implemented: can you comment?
    f. What are the plans for the Blue and John Crow mountains?

3. Financial Considerations
    a. There have been complaints about high charges for the use of space and stringent regulatory issues that negatively impact cultural and creative production, how do you respond?
    b. Is there an Infrastructure/Development budget for Kingston as a Creative City? A forecast would be welcome.

These objectives formed the basis of the development of the NOC methodology for the Kingston: Networks of Culture (K:NOC) mapping study.

The next chapter outlines the NOC methodology.

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PLATFORM

The Cultural Relations Platform is project funded by the Partnership Instrument (Service for Foreign Policy Instruments, European Commission) launched in April 2020 to support the European Union to engage in international cultural relations within the framework of the EU strategy for international cultural relations.

The CRP follows up on the previous Cultural Diplomacy Platform, CDP (2016-2020). It provides a renewed approach based on a set of shared principles and new activities, aiming to promote and facilitate sustainable cultural exchanges, people-to-people activities, and co-creation processes between Europeans and citizens from countries all over the world.