

CREATIVE INDUSTRIES STRATEGY & ACTION PLAN – Saint Lucia

Background	
<p>General description</p>	<p>In trade language, much of the sector is referred to in the Central Product Classification (CPC) applied in the General Agreement on Trade in Services (GATS) as Entertainment (CPC 9619), under Recreational and Cultural Services:</p> <ul style="list-style-type: none"> 96191 Theatrical producer, singer group, band and orchestra entertainment services 96192 Services provided by authors, composers, sculptors, entertainers and other individual artists 96193 Ancillary theatrical services 96194 Circus, amusement park and similar attraction services 96195 Ballroom, discotheque and dance instructor services 96199 Other entertainment services <p>In addition to the above, creative industries also include the audio-visual, fashion design and interior design sectors. There is no category in the Central Products Classification (CPC) for fashion design. Interior design and decorations are classified under Specialty Design Services (CPC 83911). Chefs de cuisine and arts & crafts are also often included in discussions on the creative industries in the Caribbean.</p> <p>For the purpose of this strategy, the creative industries in Saint Lucia comprises: live and recorded music; music publishing; songwriting; writing (literature and poetry); dance; paintings and sculptures; fashion design, crafts and festivals.</p>
<p>Types of services</p>	<p>A cultural mapping exercise was conducted in Saint Lucia in 2014, specifically in Anse La Raye, Gros Islet Town, Laborie, Mabouya Valley, Monchy, Soufriere and Vieux Fort. The exercise included 62 sub-categories such as: visual arts (including graphic design); crafts; carnival; creole language teacher; traditional food, drink, medicine and furniture manufacturing; music; dance; literature; amongst others. The largest categories identified in this mapping exercise in the <i>services sector</i> included: contemporary singers, contemporary musicians, disc jockeys (DJs), poets, accessory and clothing manufacturers (note that fashion designers would fall under this category), wood sculptors and crafts persons.</p> <p>A strong emphasis has been placed on festivals, namely the Saint Lucia Jazz Festival, as well as Carnival. Music is another priority focus in this sector. There is a Saint Lucia School of Music.</p> <p>The National Arts Festival has recently established an enhanced collaborative arrangement with the Saint Lucia Jazz Festival.</p> <p>While Saint Lucia hosts an annual film festival (now in its 6th year), no significant video or film production businesses (traditional or animation) have been developed at this stage in Saint Lucia – but there is potential. TEPA notes in its Priority Sector Analysis that the sector has seen some growth over the past two years.</p>

<p>Size of sector, trends, growth (global/regional)</p>	<p>The creative industries have seen rapid growth globally, including in developing countries. Global trade in creative goods and services were estimated at US \$624 billion in 2011. Developing countries were responsible for 50% of this total. Design (fashion, jewelry, interior) is the largest contributor to trade in the creative sector and new media is the fastest growing sector. Creative services exports in 2011 totaled US \$172 billion globally, tripling in value from the 2002 total.</p> <p>Creative goods exports from the CARIFORUM region comprised US \$408 million in 2011. Data on trade in creative services in the Caribbean is not available.</p> <p>Data from the 2012 Saint Lucia Labour Market Survey suggest that Arts, Entertainment and Recreation accounted for 1.5% of total employment in the country. Almost three-quarters of employees in this sector were men (72%). Sub-groups of the Arts, Entertainment and Recreation sector are: Creative arts and entertainment activities; Libraries, archives, museums and other cultural activities; Gambling and betting activities, and Sports, amusement and recreation activities. In the Creative, arts and entertainment category, 331 people were recorded in the 2010 census, of whom 72.5% were men. There were more men than women in this sub-sector at most levels; managers, professionals, technicians and service and sales workers. The exception was clerical support workers, most of whom were women.</p> <p>A limitation of Labour Market statistics is that they focus on the main occupation of people and usually do not pick up evidence of secondary jobs and income-earning activities other than a primary job in the formal sector. People may also fail to declare some types of work in order to avoid taxes and government regulations. These issues may apply especially to creative industries, where it is difficult to make a living from these activities alone given the limitations of the market for them in a small island developing state. Thus census data is likely to underestimate the size of the sector and to capture only the few who have succeeded in earning their primary income in this sector.</p> <p>The 2014 cultural mapping exercise suggests indeed that labour market and census statistics underestimate the size of this sector. Though the survey was conducted only in some parts of Saint Lucia, it revealed 426 Creative and Cultural practitioners in these areas alone - more than the Census had discovered for Saint Lucia as a whole (331 people). This exercise confirmed that most practitioners were men, but the percentage was somewhat lower, at 63.1%, than in the Labour Market survey and Census. This suggests that there are proportionally more men formally employed in this sector, while the Mapping Exercise would have identified more people who worked in the sector part-time and informally. Overall the data available are limited but point to the likelihood that the 1.5% stated in the 2012 Labour Market survey underestimates the percentage of people employed in the sector in Saint Lucia.</p> <p>In terms of occupations within the creative sector, the 2014 Cultural Mapping exercise revealed there were more males than females in the following fields, among others: basket-making, contemporary dance, creative writing, disc jockey, film makers and videographers, literary creative writing, manufacture of wood products, musician and</p>
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	<p>sculpture. There were more females than males in the fewer areas: traditional dance, poetry, manufacture of coconut or castor oil and traditional food and drinks, cake decorating, clothing and craft.</p> <p>Of interest regionally: the Barbados government published a Cultural Industries bill in 2013 that aims to offer a range of tax and fiscal incentives targeted at facilitating growth in the sector. The Trinidad and Tobago government recently created the Creative Industries Company, which aims to foster investment and allow for trade facilitation. Jamaica has developed a Creative Industries Sector Plan for Vision 2030.</p> <p>Caribbean Export Development Agency has a five year programme in place under the 10th EDF (ending 2015) specifically to support the region’s creative industries, aimed at moving the sector from “cultural expressions to economic ventures”.</p> <p>While the digital environment has greatly increased scope for reaching consumers all over the world, these digital platforms pose challenges for artists from Saint Lucia and the wider Caribbean who have not yet embraced them.</p>
<p>Potential economic impact for Saint Lucia</p>	<p>According to “The Economic Impact of Carnival in Saint Lucia”, the creative sector contributed to 8% of GDP in 2010, up from 6% in 2000. The creative industries also contribute approximately 5% of employment.</p> <p>Although the cultural mapping exercise notes that the music/entertainment sector comprises 113 persons active either on a part-time or full-time basis, the Eastern Caribbean Collective Organization notes 403 members from Saint Lucia in 2012. It is anticipated that the numbers in this sector are even higher. There is strong potential to increase further employment in this sector, particular with youths, as well as to add value to the tourism product.</p> <p>According to the 2010 Population and Housing Census, there are approximately 122 persons from the creative industries employed in the hotel industry in Saint Lucia.</p> <p>Data with regards to this sector is fragmented and incomplete. The development of a comprehensive database for the sector should be given some priority. All data should be disaggregated by sex to monitor the numbers of men and women in the sector in various positions and levels of the industry.</p> <p>Also note, a National Cultural Policy was developed in 1999 - www.cdfstlucia.org/portal/wp-content/uploads/2014/11/National-Cultural-Policy-of-Saint-Lucia-sm.pdf. Formerly, a Minister of Culture / Ministry of Culture was in place. A Creative Industries Bill is currently in the pipeline.</p> <p>In the 2015 budget statement, a sum of EC\$1 million dollars was allocated towards the development of the creative industries during the 2015/16 financial year. Activities to be undertaken include: 1. Public Awareness promoting the Creative Industries as a strategic sector for Saint Lucia; 2. A Small Grants Programme providing access to finance for micro and small size enterprises operating within the cultural/creative industries; 3. Support in developing marquee industry events by designing and establishing creative sub sector specific events locally and abroad so as to promote and develop branding for artists and the Saint Lucia brand; 4. An Art in Public Spaces Programme to produce creative works that embellish our urban and built environments; 5. Training and</p>

	<p>Capacity Building & Organizational Development in all major sub sectors including music, dance poetry, film, photography, visual arts and digital media; and 6. An Export Market Development Programme supporting external opportunities.</p> <p>A Festivals Commission is also being established to manage the Saint Lucia Jazz and Art Festival as well as Carnival.</p> <p>The fashion and design sub-sector in Saint Lucia has seen an increase in demand owing to the diversity presented in its product offering, as well as its association with major fashion events (Fashion Week) in the North American market and the Caribbean markets.</p> <p>The Saint Lucia Jazz and Arts Festival is the flagship event which showcases entertainers from St Lucia as supporting acts to international stars, but it is limited in terms of impact for local artists.</p> <p>In 2013, according to a ‘visitor exit survey’, 2497 visitors came to Saint Lucia “specifically for Carnival”, staying on average 8.3 days. Visitor expenditure related to Carnival amounted to EC \$9 million (EC \$3600 avg./per person). Of this, ‘Carnival services’ totaled EC \$4 million, with 55.7% of Carnival visitors attending more than 4 Carnival events. It was noted however, in ‘The Economic Impact of Carnival in Saint Lucia’, that despite these figures, Carnival services suppliers work at a loss. It has been posited that with more resources extended in support of Carnival, coupled with relevant incentives, as well as enhanced marketing and improved production, there is potential for larger gains, including increased employment in this sector.</p> <p>According to Saint Lucia Jazz Redesign Report (2012) expenditures for the Saint Lucia Jazz (i.e. facilities, equipment, manpower, talent, accommodations, meals, transportation, marketing, administration, Jazz Opening Ceremony, Jazz on the Square, Jazz in the Square and Other Venues) varied from a high of EC\$9,928,167 in 2009, to a low of EC\$5,021,680 in 2001. Conversely, revenue (i.e. ticket sales, concessionaries fees, sponsorship, etc.) ranged from a high of EC\$2,312,099 in 2001 to a low of EC\$1,680,991. Tourist arrivals during the Saint Lucia Jazz peaked at 13,670 in 2005, dropping off to a low of 1,512 and 1,107 in 2010 and 2011 respectively. Average spend ranged between approximately EC\$3000.00 to EC\$5000.00 per person, but averages around EC\$4000.00 – in a similar range as Carnival.</p>
Gender issues	<p>Available information suggests that more men than women work in the Creative Sector and men are more likely than women to have formal employment in this sector. The current project has also found that boys are more likely to take creative arts subjects at school than girls. For instance, in 2014, around 60% of Caribbean Secondary Examinations Certificate candidates in Visual Arts and Music were boys. This was an important exception to the general rule that girls comprise the majority of those sitting examinations in educational subjects suited to employment in the services sector. This perhaps reflects an interest of boys in participating in the Creative Sector. However, there are few sittings of these subjects compared to most other subjects, and they are not supported at any level of education by complementary business training, internships or job placements that</p>

	<p>could foster expansion of human resource capacity.</p> <p>Many in the cultural industries operate individually and independently, sometimes as a sideline to other work which offers greater financial reward and stability. Their creative work is often not picked up in official statistics. As shown in the 2009 Enterprise Census in Saint Lucia, the smaller the company, the more likely it is to be owned by a woman, with women owning the majority of micro-enterprises and men most of the small, medium and large companies. A lack of child care provision and supportive legislation for flexible working and for greater involvement of men in caring tasks constrain the involvement of women in company expansion and exports. These difficulties may be particularly acute for those working in entertainment, who may need to work in the evenings and night-times, when child care and safe transport are especially scarce. Lack of participation by some fathers in child care may constrain the ability of mothers to engage in Mode 3 and Mode 4 exports, since mothers are responsible for the majority of child care. Such difficulties may prevent the ascent of women to higher levels of the supply chain, with much of their activity constrained to near their home base.</p> <p>Access to finance is a general challenge for small businesses in the Creative sector, and this is reported to be aggravated for women. This may be a result of cultural preferences to lend to men along with challenges associated with the especially small size of the companies owned by women and their perceived lack of capacity for expansion.</p> <p>Issues of representation and sexuality arise in cultural industries, especially affecting fashion models and designers and visual artists. For Caribbean people trying to sell their products in metropolitan markets, issues of "race" and gender and their intersections are important. It is important to consider how such issues can affect stakeholders, and shape their business opportunities and viability. Some may form alliances, for example with diaspora organizations or individuals, to overcome or circumvent such difficulties.</p>
<p>Main players in the sector</p>	<p>Saint Lucian success stories in this sector include the following. This list is not exhaustive:</p> <p>Derek Walcott – Author/Poet – Nobel Prize in Literature 1992 Stephen Dantes – Poet Adrian Augier – Poet/Visual Artist Vladimir Lucien - Writer Kendel Hippolyte – Playwright Joseph Marcell – Actor George Alphone – Actor Trix Worell – Director Davina Lee – Filmmaker Llewellyn Xavier – Visual Artist – Featured in galleries across the world including the Smithsonian Institution and the Metropolitan Museum of Art, New York Dunstan St. Omer - Artist</p>

	<p>Shawn Pete Son – Music Producer Boo Hinkson – Jazz Guitarist Taj Weekes – Blues Singer Brittany Noon – Model Nina Compton - Chef Delia Isaac, Luciana Maxwell, Shazi Chalon, Vincent McDoom – Fashion Designers</p> <p>While there are some professional entertainers and a wide variety of amateur entertainers and artists, few are internationally known; however, several have developed strong regional reputations.</p>
<p>Associations and Intermediary Organizations</p>	<p>There are many entities in Saint Lucia that represent the creative industries. These include:</p> <p>Ministry of Tourism, Heritage and Creative Industries - www.govt.lc/ministries/tourism-heritage-and-creative-industries/creative-industries Saint Lucia Coalition of Service Industries – www.slcsi.org.lc</p> <p>Saint Lucia Calypso Association – active - www.facebook.com/slca2009 Association of Music Professionals (AMP) – inactive Eastern Caribbean Copyright Organization (ECCO) – active www.eccorights.org Saint Lucia National Steel Bands Association – inactive www.facebook.com/pages/StLucia-National-Steel-Bands-Association/509732855735138 Saint Lucia Carnival Planning and Management Agency – active (subsidiary of CDF) - www.stluciancarnival.com/about_us/about-us Cultural Development Foundation of Saint Lucia – active – www.cdfstlucia.org Carnival Bands Association – active Saint Lucia Visual Arts Society – inactive Professionals in Action for Creative Enterprise – inactive Fringe Saint Lucia (literature) – active – www.fringestlucia.com Saint Lucia Folk Research Centre – active - www.stluciafolk.org Caribbean Performing Arts Federation – active - www.c-paf.com Audio Visual Film Association of Saint Lucia – active Textile Industry Cooperative Society – inactive Fashion Design Council – new – one meeting held to date Saint Lucia National Trust – active - www.slunatrust.org Creative Development Network – active - www.facebook.com/Creative.Development.Network Saint Lucia Coalition of Service Industries – active – www.slcsi.org.lc Saint Lucia Trade Export Promotion Agency – active – www.tepa.org.lc</p>
<p>Internal to Saint</p>	<p>Strengths</p> <p>Interest from youths in creative activities and entertainment, particularly music, coupled with a certain amount of natural creative talent (“intuitives”).</p>

<p>Lucia</p>		<p>Potential international competitiveness of some creative services from Saint Lucia, particularly music, based on individual success stories.</p> <p>Synergies of entertainment/culture with the tourism product can provide global branding and promotion opportunities and can increase appeal of Saint Lucia as a tourism destination.</p> <p>Some professionals are formally trained in their disciplines.</p> <p>Significant range (genres) of musicians and a diversified sector in general.</p> <p>Increasing interest and support of the sector (implementation of talent shows and outreach programmes, undertaking various studies, support to the creative industries in 2015 budget).</p>
	<p>Weaknesses</p>	<p>Lack of confidence on the part of the private sector in the public sector, stemming from a perceived implementation deficit related to promised actions and inadequate support offered to the sector (according to <i>Competitiveness and Sustainability in the Music Sector</i> the Saint Lucia budget for the creative industries is 0.03% of total budget).</p> <p>High duties and/or taxes on all inputs to creative expressions, particularly digital or electronic equipment.</p> <p>Very limited public – private partnerships in the sector. No mentorship, apprenticeship programs in place for young creative persons, Much of the creative output in Saint Lucia is from what is known in the industry as “intuitives” or people with natural talent.</p> <p>Inadequate training, practice and performance facilities for artistic expression.</p> <p>Poor institutional framework – there are many associations, however they are fragmented, weak and their mandates are unclear or overlapping. There is a lack of cooperation and coordination. Associations are often personality driven.</p> <p>Weak policies governing the sector, stemming from limited consideration of the sector as a viable contributor to economic development.</p> <p>Slow pace of adaptation to online technology for promotion and distribution of creative products and services.</p> <p>Lack of business development skills including product development, marketing and entertainment management.</p> <p>Lack of cross-sectoral linkages beyond tourism – i.e. ICT, legal, business.</p>

		<p>Inadequate protection of copyright or intellectual property in Saint Lucia.</p> <p>Lack of financing including angel financiers or tangible incentives for investment in the creative sector.</p> <p>The National Lottery was set up to promote sports and culture in Saint Lucia. Funds were supposed to have been made available for artistic development but this was never realized.</p> <p>Inadequate data collection and monitoring by government and industry associations.</p> <p>Lack of facilitation via the Labour Code and other legislation and by employers of flexible working arrangements and child care facilities that would enable gender-equitable participation in the sector.</p>		
External to Saint Lucia	Opportunities	<p>Projected tremendous growth in demand for entertainment and wide range of creative products and services in developed and developing countries. The creative sector is growing at 10% annually.</p> <p>Positive impressions of the Caribbean as a creative society and an interest and appeal of Caribbean music, in particular to various demographic segments in developed countries – e.g. over 70 Carnival type activities are held around the world every year.</p> <p>Untapped markets in the European Union where there is specific market access granted under the Economic Partnership Agreement (EPA) and cooperation opportunities if Caribbean governments put in place the necessary official bilateral agreements with European counterparts.</p>		
	Threats	<p>Competition from many different creative genres and countries.</p> <p>Lack of regional/international partnerships, including with diaspora organizations</p> <p>Increasing reliance on technology (particularly digital platforms and Internet-based facilities) to deliver creative services which Saint Lucia creative persons cannot afford or do not have at the moment.</p>		
Demand				
Potential Markets:	Characteristics of Potential Clients & Mode of Supply:	Why interested:	Competitors:	
Saint Lucia	Very little potential for growth, except for music and live entertainment due to small population.	Easy to undertake - a good starting point to improve stage performances. The easiest option for cultural practitioners who find it difficult to travel because of family responsibilities.	Other OECS and CARICOM creative entrepreneurs under Economic Union and Single Market; especially musicians – though this can also be an used as an advantage in the establishment of innovative regional alliances.	
Caribbean	Good growth potential for all sub-	Market for music, art and fashion is	Barbados, Jamaica, Trinidad,	

	<p>sectors. Cross border supply via Internet (Mode 1) and temporary entry (Mode 4) for live performances, both of which target the Caribbean youth market.</p> <p>Equally, there is a large Caribbean audience that attends the Saint Lucia Jazz Festival and Carnival* (Mode 2).</p>	<p>substantial and vibrant in Trinidad.</p> <p>*Data from the 'Economic Impact of Carnival in Saint Lucia' indicates that 40% of Carnival specific visitors arrived from Martinique, 18% from Trinidad, 13% from the USA and 8% from Barbados.</p>	<p>worldwide</p>
Canada & USA	<p>Diaspora population and tourists (Mode 1 and Mode 2). Diaspora organizations and contact with emigrants can help with establishing Mode 3 and Mode 4 exports.</p> <p>Large Caribbean carnivals take place in Toronto and New York. Caribbean events also take place through much of the US and Canada. There is scope to explore opportunities particularly for carnival services providers, steel bands, musicians and DJs (Mode 4).</p>	<p>Strengthen feelings of connection with Caribbean.</p>	<p>Worldwide – however the diaspora typically holds strong feelings for the Caribbean.</p> <p>Note that the top five markets for visitors to Saint Lucia are: the United States of America, the United Kingdom, the Caribbean, Canada and the rest of Europe, respectively. During the past five years arrival numbers have ranged between 278,000 and 312,000 visitors. (Saint Lucia Jazz Redesign Report)</p>
United Kingdom	<p>Diaspora population and tourists (Mode 1 and Mode 2). Diaspora organizations and contact with emigrants can help with establishing Mode 3 and Mode 4 exports.</p> <p>Large Caribbean carnival takes place in Notting Hill. There are over 20+ Caribbean carnivals that take place in England every year (Mode 4). There is scope to</p>	<p>Strengthen feelings of connection with Caribbean.</p>	<p>Worldwide – however the diaspora typically holds strong feelings for the Caribbean</p>

	explore the opportunities around these events.		
Europe	<p>Tourists (Mode 1, Mode 2). Diaspora associations and contact with emigrants can help with establishing Mode 3 and Mode 4 exports.</p> <p>Potential to explore opportunities related to International Music Festivals. There are also Caribbean carnivals that take place in France, Germany and the Netherlands.</p>	Market access granted under EPA.	Worldwide
Latin America	Potential young consumers reachable though cross border supply (Mode 1); but language barrier since St. Lucians are more focused on Anglophone markets.	Not much interest.	Worldwide
Saint Lucia's competitive advantage or unique selling point?	Not evident that Saint Lucia has a unique selling point for music or any other creative services since much of it is seen as generic Caribbean music, art, dance, crafts or fashion by external consumers. The island attracts a broad range of wealthy tourists from all over the world and this can be harnessed to increase the market for creative expressions/outputs. There is potential to combine marketing of tourism, entertainment and fashion in a symbiotic way.		
Cost comparison	Not available/unimportant; but the very small scale of all cultural services suppliers means that it is best to focus on high value, niche market segments rather than mass consumer markets that seeks low prices. There is an exception for music, in which the mass market can be reached through new technologies.		
Marketing and Promotion	Current Context	Other Considerations	
Existing channels	The Saint Lucia Tourist Board has a website and is active on the following social media platforms: Facebook (active – 60k Likes), Twitter (active – 6400 followers approx.), YouTube (258 subscribers), Pinterest (2340 followers approx. - which features boards including 'Culinary	Saint Lucia has a wide and active Internet/social media presence. However, the number of 'fans' on each of the social media platforms is low	

	<p>Cuisine Culture’, ‘Saint Lucia Jazz and Arts Festival’, ‘Saint Lucia Events’, ‘Chef Nina Compton’ and ‘Fashion for the Islands’, amongst others), Instagram (active - 2,560 followers approx.) and Google+ (active – 123 followers). Events are marketed through all of these channels.</p> <p>Promotional efforts also take place by overseas mission. There is a Saint Lucia UK website as well as a Saint Lucia UK Facebook page (active – 9,700 Likes), Twitter account (active - 2527 followers) and YouTube channel (active - 38 subscribers).</p> <p>The Saint Lucia Jazz and Arts Festival also has a website and is active on the following social media platforms: Facebook page (active – 11k Likes approx), Twitter (active – 148 followers), Instagram (1,117 followers), Google (active – 32 followers).</p> <p>There are three websites for Saint Lucia Carnival: Lucian Carnival (www.luciancarnival.com) (plus Facebook, Twitter, Youtube, Google+); Saint Lucia Carnival (www.stlucia-carnival.com) and Lucian Carnival (www.stluciancarnival.com) (plus Facebook, Twitter, Instagram, Youtube). In addition, many of the bands have websites and/or Facebook pages.</p> <p>Mobile apps have been developed for the Saint Lucia Jazz and Arts Festival and Saint Lucia Carnival.</p> <p><i>Vibes Caribbean, Tempo, CEEN TV</i> shows/stations in the United States and <i>Jam TV</i> in the UK also feature Caribbean events.</p> <p>Sex-disaggregated data should be collected from Social Media sites to reveal the number of men and women active on these sites and facilitate potential gender-related marketing opportunities.</p>	<p>(eg. by comparison, the Barbados Tourism Authority (Visit Barbados) Facebook page has 196,000 Likes and the Facebook page of the Jamaica Tourist Board (Visit Jamaica) has 820,000 Likes). That said, after Jamaica, Saint Lucia appears to be applying the most comprehensive online marketing strategy in the region. The focus should be on increasing numbers of fans by more actively promoting the social media channels.</p> <p>Collaboration in promoting harmonized messaging should also be considered. For example, Saint Lucia UK and the Saint Lucia Tourist Board should share more content between each other, particularly video content.</p> <p>Not only must outward communications be considered, but so too internal communications – what does Saint Lucia say to Saint Lucians about culture? A better understanding of the creative sector’s contribution and potential contribution to the economy of Saint Lucia must be developed within the general public, including the creative industries itself. The creative industries should be recognized as a viable and important career option. (This will require more accurate and comprehensive data on the sector).</p>
New channels	New channels are being exploited including social media and mobile apps.	
Branding & Advertising	Saint Lucia Jazz and Arts Festival and the Saint Lucia Carnival have a good online presence. It may be worth considering a joint platform dedicated exclusively to the creative industries.	A more coordinated approach to branding and advertising should take place in order to maximize on

		<p>resources and reach. For example, there should be mutual promotion on the sites and social media accounts listed above. It is recommended that a communications strategy which involves all the stakeholders be developed.</p> <p>Equally, means of promoting events/creative industries on international web and social media platforms should also be aggressively pursued.</p> <p>A recommendation was made in the <i>Saint Lucia Jazz Redesign</i> report that an events commission should be established. This would support a more cohesive approach to marketing the creative industries.</p>
Collateral marketing material	Saint Lucia also produces visitor guides. For example, Saint Lucia: the Experience is available in print and as an e-book. The e-book, however makes very little mention of the creative industries.	
Coordinated Strategic Plan (Stakeholders)	There is no coordinated policy instrument or plan focused on the creative sector, however a creative industries bill is presently being developed, based on the Creative Industries White Paper, <i>Policy and Strategic Framework for the Creative Sector – 2013</i> .	The White Paper identifies the creative industries as a potential “pillar for economic development”. The fact that the government recognizes the sector as a viable contributor to economic development is critical.
Investment incentives	There are no specific incentives offered for development of the creative sector in Saint Lucia – including tax and duties. Indeed, creative persons and entrepreneurs have to pay prohibitive and often unreasonable tariffs and other duties and charges (ODCs) on imported inputs to creative industries. This includes, for example, musical instruments – instruments must be logged with customs officials during travel performances to avoid duties on reentry, as well as duties and taxes on CDs on which the music of a Saint Lucian artist has been	

	<p>recorded (e.g. an artist duplicating CDs in the US must pay duties and taxes on whole value of a CD of their music – and not just on the value of the discs/duplication alone).</p> <p>There is a growing unease within the creative industries with regard to the generous incentives extended to the hotel sector, in comparison with the high duties and taxes charged on inputs to the creative industries.</p> <p>There is an urgent need to remove this barrier and let people invest in creative outputs of all kinds.</p>	
<p>Standards and quality</p>	<p>The need to improve standards and quality in the creative sector has been outlined in several reports including the White Paper, TEPA Priority Sector Analysis, Competitiveness and Sustainability in the Caribbean Music Sector and Saint Lucia Jazz Redesign. This might include formal and informal: talent training development workshops, business training development workshops, mentoring programmes, writing camps, master classes for musicians and greater incorporation of the creative industries into curricula, etc. This applies across all creative sectors. It is also recommended that training be sought in the EU through cooperation agreements.</p> <p>The need to develop business skills is just as important as the need to develop technical skills (e.g. marketing, financial planning). Consideration should be leant to the development of business incubation programmes for persons in this sector.</p> <p>High-quality support services are also required, for example music producers, managers, sound engineers, recording engineers, music publishers, stage management, lighting, cinematography, video production, etc. Training should also be provided in this respect. International standards must be met in all areas in order to achieve success.</p> <p>Lastly, capacity to effectively support the sector must be developed at Government and Business Support Organization as well. These entities do not necessarily understand how best to support this emerging sector. This includes developing a strong understanding of the sector at national, regional and international levels with the view to</p>	<p>Technical assistance can be sought in this area.</p> <p>TEPA and SLCSI support this area.</p> <p>If Saint Lucia signs cultural cooperation agreements with European countries (as anticipated in the EPA) some of these capacity-building needs will be addressed.</p>

	<p>being able to provide market intelligence and export support.</p> <p>Standards should be implemented where relevant and attention paid to quality control.</p>	
Innovative marketing	<p>While the Internet is being well utilized and maintained in the creative industries (in certain areas), a much more aggressive strategy is required. It must be reiterated that Saint Lucia is competing internationally and accordingly its marketing efforts must stand out at an international level.</p> <p>There is a need to market on well-known international platforms, form global strategic alliances, participate in international festivals, explore merchandizing, produce high-quality video content (particularly in music), maximize on the use of social media and actively seek to grow fan base.</p>	Marketing should be driven via a comprehensive communications strategy. This process should involve ideally all stakeholders in the creative industry to some extent.
International outreach strategy	<p>Negotiate cultural cooperation activities bilaterally with European states as provided for under the EPA Protocol on Cultural Cooperation in order to get Saint Lucia artists of all kinds in collaborative programs in Europe – artists in residence, stages, joint productions, etc.</p> <p>Note: Fringe Saint Lucia has developed a Reciprocal Arts Partnership (RAP) with Brighton, U.K. The partnership is designed to establish an international exchange (open access) arts festival between Brighton and the South East of England and Saint Lucia.</p> <p>The outreach strategy should also include visibility on international websites, participation in international events, etc.</p>	
Regional collaboration	To ensure critical mass and access to a wider range of skills and resources, it is necessary that creatives in Saint Lucia seek to establish strategic alliances with their OECS and CARICOM counterparts OECS creative persons should be considered as “nationals” and intra-OECS collaborative projects as “national works”.	
Linkages with other clusters of economic activity	While the linkage between the creative industries and tourism is clear, it is important to explore and develop the connections with other sectors such as the ICT, business management and legal sectors, establishing	

	<p>professional clusters in the creative industries.</p> <p>The ICT sector is particularly important to the creative industries in order to develop tools for disseminating cultural content online. There is a need to build IT platforms for promoting and distributing or selling Saint Lucia’s creative goods and services.</p>	
	Action to be Taken	Other Issues to be addressed
Policy barrier	<p>In December 2012, the Government of Saint Lucia developed a ‘Green Paper’ that proposed policy and strategic direction in the creative industries. In May 2013 a white paper entitled <i>Policy and Strategic Framework for the Creative Sector</i> followed. It is understood that this is to serve as the basis of a cultural industries bill.</p> <p>The first three (of five) objectives of the white paper are:</p> <ul style="list-style-type: none"> • to guide the creative potential of the nation toward economic benefits generated from its cultural, artistic, innovative and traditional expressions; • to provide employment and revenue for a wide range of individuals, businesses and organizations, including artists, artisans, designers, vendors, producers, event organizers and service providers and; • to stimulate economic growth, support economic activity and livelihoods in a number of sectors, and generate fiscal revenue; <p>This demonstrates that the creative industries are now being recognized as sector which contributes to economic development.</p> <p>The Government has also created a Ministerial portfolio dedicated to the creative industries under the purview of the Ministry of Tourism, Heritage and Creative Industries.</p> <p>The Cultural Development Foundation (a statutory organization) also has a strategic plan in place, however, the organization seems to be guided by a National Cultural Policy developed in 1999.</p> <p>Stronger public-private sector partnerships must be established to drive policy decisions. A multi-stakeholder Creative Industries Task Force should be charged with putting in place mechanisms to stimulate the sector.</p>	<p>Note also that the White Paper refers to the “Cultural Policy” frequently but it is not clear what is meant by that. The 1999 policy document is dated and needs to be revisited to reflect technological changes that have radically transformed the dissemination or supply of creative products and services. The White Paper indicates that “the Ministry will not approach its programming and interventions according to sub-sectors (e.g. film, theatre or software applications) and will instead focus on cross-cutting issues and functions (e.g. business support, organizational strengthening or access to markets)”.</p> <p>The White Paper also states that “the Ministry will become the hub for all information and services related to business and trade.” But this role should lie outside the ministry with business support organizations such as the SLCSI, which has more flexibility to action opportunities and information than the government typically does.</p> <p>The important area of focus is less the development of policy, but more so the</p>

		implementation and monitoring of policy initiatives for the creative sector.
Administrative barriers	Hassles to move artistic equipment in and out of Saint Lucia and even within CARICOM single market.	
Business environment	<p>Saint Lucia enjoys a fairly relaxed business environment, in which no real restrictions on business exist. However, the market is a very small one.</p> <p>The Government must continue to create opportunities for the creative industries to showcase their work and accordingly, reap economic benefits. Business support organizations must continue to seek out and share national, regional and international opportunities in the sector with its stakeholders.</p> <p>One of the most significant challenges in this respect noted by creative industries stakeholders is the difficulty in securing financing. Financing should be provided to support the sector in capitalizing on business opportunities. As well, there is a need to look outwards to grow the creative industries (diaspora, investors).</p>	
Regulatory environment	<p>The legal and regulatory framework is discussed in the White Paper. It is noted therein that a review of the existing framework will take place. As part of this review process, the need for a new Creative Industries Development Act or similar instrument will be assessed.</p> <p>The White Paper further notes that the Ministry responsible for Creative Industries, together with the Ministry of Finance and the Ministry of Commerce, will develop a comprehensive incentives regime for the sector.</p> <p>Prohibitive duties and other duties and charges (ODCs) on inputs to creative activities are enforced. These act as a major disincentive to investment in creative projects by St. Lucians and foreigners.</p>	Some persons may get tariffs waived on an ad hoc basis but this is unpredictable and subject to political capture. A consistent and transparent regime for waiving tariffs and other duties and charges (ODCs) on inputs imported by bona fide artists is needed.
Human Resources & Standards	While natural talent may be impressive in Saint Lucia, training is needed to meet international standards of competitors worldwide (see	

	<p>'Standards and Quality'). There should be on-the-job training and mentorship opportunities as well as vocational and academic courses covering artistic, technical and business skills.</p> <p>Negative attitude in society towards arts and artistic training in general must be improved through public education campaigns (see 'Existing Channels'). This may be facilitated by creating alliances between teachers and practitioners of artistic expressions.</p> <p>Training in business management in arts/ entertainment is clearly lacking and should be provided.</p> <p>Training in support services to the sector is equally lacking.</p> <p>National business support organizations and government do not generally have skills or experience in the development of this sector.</p>	<p>The OECS-CBU has strong emphasis on creative industries. They should be approached for assistance or collaboration.</p>
<p>Financing</p>	<p>Very limited financing for creative projects is available in Saint Lucia. Debt financing is typically not possible from commercial banks given the lack of collateral typical in this sector. There is a need for innovative solutions to this critical problem. The distribution of grants and loans between the sexes should be monitored to guide informed decision-making to promote gender equity.</p> <p>A region-wide Angel Investor Network is presently being developed by Caribbean Export. An OECS-wide solution might be considered as well.</p> <p>There are examples of financial institutions specialized in the creative sector (such as the IFCIC¹ in France or the Audiovisual SGR in Spain,²) and private banks (such as Ingenious in the UK³). But these are unlikely</p>	

¹ Institut pour le Financement du Cinéma et des Industries Culturelles (IFCIC) is a financial institution with a mandate from the Ministry of Culture and Ministry of the Economy and Finance to contribute to the development in France of cultural industries by facilitating these firms access to bank financing. As a neutral and autonomous entity, IFCIC is 49% owned by the State, OSEO Group and La Caisse des Dépôts, and the rest by a private shareholder committee including almost all French banks. (www.ifcic.fr).

² www.audiovisualsgr.com.

³ www.ingeniousmedia.co.uk.

	<p>to develop in the tiny markets of CARICOM and certainly not with the current attitudes in financial institutions and no real credible thrust by Caribbean governments to stimulate the sector. It may therefore be worthwhile to study these institutions to see how they operate and in particular, how they value intellectual property assets and contracts held by creative persons and firms for lending purposes. While these institutions are not in a position to provide technical assistance to the Caribbean, national governments should discuss with them key elements of their operation as criteria for selecting creative projects for financing, and the kinds of technical advice that they provide to creative entrepreneurs, among other issues.</p> <p>International funding opportunities, grants and schemes should be monitored for opportunities in this sector. It has been noted that few applications are typically received from the OECS.</p> <p>The White Paper notes that the possibility of establishing a system whereby intellectual property may be used as collateral as well as a grant fund for the sector.</p>	
ACTION PLAN FOR BUSINESSES/PROFESSIONALS		
	Action to be Taken	Relevant Entities
Preparing Business for Export	<p>There is a need to establish which specific aspects of Saint Lucia's creative services are attractive to foreign consumers. Also, attention should be paid to potentially differing demand by male and female consumers, backed up by market research.</p> <p>All practitioners should formalize their businesses, including an online presence (Web and social media) and professional profiles. Creative industries practitioners must not only view themselves as artists but as professionals as well. Creatives equally must implement international standards. It is necessary to continue to develop skills related to area of expertise, as well as relevant business skills.</p> <p>Monitoring and evaluation skills should also be developed, including sex-disaggregated data on workers, business contacts and customers as well as financial and other economic data.</p> <p>All practitioners should endeavour to better understand their sector –</p>	<p>There is an opportunity to collaborate with SLCSI with regards to the organizations export training programme for services providers.</p> <p>Export coaching is another area in which technical assistance can be sought.</p> <p>All creative professionals.</p>

	<p>the trends, threats and opportunities, at the regional and international levels. Practitioners should familiarize themselves with the relevant Internet platforms for dissemination of music and video content.</p> <p>Businesses should address needs for child care facilities and the involvement of family members in the provision of care for dependents in order to facilitate gender-equitable access to opportunities for performing and visual artists to export their services.</p> <p>Sub-sectors should form associations and revive inactive ones. Associations should play an active role in the development of the sector through lobbying and advocacy efforts. Associations should seek to develop skills in this area.</p> <p>Equally, businesses should seek to establish cross-sectoral clusters (IT, tourism, manufacturing, fashion).</p> <p>The Saint Lucia diaspora should be specifically targeted in export efforts.</p>	
Market Research	Practitioners in the creative industries should familiarize themselves with international trends and opportunities (as well as threats) in North America and the EU in particular. The potential of gender-specific marketing should be explored.	
International Business Plan	Creative industries practitioners must begin to treat their art in a professional/business manner by developing business and export plans.	Support can be sought from SLCSI and TEPA to this end.
Market Entry Strategies	<p>Export efforts in this sector often being with tourists/visitors to Saint Lucia (Mode 2).</p> <p>There is potential for Mode 1 (cross-border) trade, however cultural products and services should be made available on platforms where they can be sold (e.g. iTunes).</p> <p>Utilize contacts in the West Indian diaspora in North America and Europe for promotional events and for Mode 4 supply (temporary entry) in main markets. Undertake research on large events (carnivals, international music festivals, college/Caribbean activities) and establish</p>	

	<p>is there is scope for participation in these activities.</p> <p>Use EPA market access facilities for entertainers in UK & rest of EU.</p> <p>Trade missions to major international artistic events for Saint Lucia artists are critical.</p>	
Best Practices/Success Stories	Success stories, such as the one noted in this documented, should be developed and made publicly available (e.g. websites, magazines, highlighted at business/trade events).	It is necessary to document success stories to highlight requirements for success and guide new entrants in the sector.
Tasks for associations	<p>Research markets in which Saint Lucia already has access (EU) or is negotiating access (Canada) and provide market intelligence to members.</p> <p>Develop strengths in lobbying and advocacy and actively and regularly engage the Government.</p>	Creative sectors organized into associations should be coordinated through the Coalition of Service Industries (SLCSI)
B2B cooperation	Establish strategic alliances nationally, regionally and internationally. Alliances should be established based on a need/opportunity.	<p>Opportunities for collaboration with Saint Lucia diaspora in North America and Europe is a first step.</p> <p>SLCSI can provide guidance with regard to the establishment of strategic alliances.</p>
ACTION PLAN FOR BUSINESSES SUPPORT ORGANIZATIONS (BSOS)		
	Action to be Taken	Relevant Entities
Advocacy	<p>BSOs should familiarize themselves with the sector at the national, regional and international levels and develop and implement strategies with respect to how best to support the creative industries. This will involve the collection of data, including sex-disaggregated data, to characterize the sector, monitor trends and present credible information to potential partners. Organizational overlap should be avoided. To this end, a creative industries task force should be established.</p> <p>BSOs should present and promote Saint Lucia as a location for investment in creative activities.</p>	Invest Saint Lucia, Ministry of Tourism, Hotel and Tourism Association, Ministry of Trade.

	<p>BSOs should engage the government on behalf of the private sector, where relevant. BSOs should be mindful to collect data where possible on the sector.</p> <p>They should assist in raising awareness on the value and the contribution of the sector to the general public; and BSOs should ensure that there is visibility for the creative industries in their marketing tools (website, social media).</p> <p>Highlight success stories. Consider hosting award programmes in the sector highlighting business/export success, in addition to creative expertise.</p>	
Training/Education	<p>Continue to provide training in technical areas (Internet marketing strategies, songwriting, etc.) and business development. Job placements, internships and mentoring opportunities should be arranged or developed in the range of artistic, technical and business skills needed.</p>	ECCO, SBDC, SLCSI, TEPA
Promotion & Communication	<p>Establish a national database of male and female artists and cultural entrepreneurs in Saint Lucia which is updatable on a continuous basis. This will serve to provide repositories of contacts for the different sub-sectors and serve as a marketing tool for the industry as well as improve liaison between the private sector and government officials.</p> <p>Develop a website that features information on all the creative sub-sectors.</p> <p>Mobilise personal and organizational contacts in the Saint Lucian diaspora to maximise export opportunities. Also use these contacts for publicity purposes to counter any media stereotyping, sexism and racism in the treatment of Saint Lucian cultural practitioners who export their services.</p>	<p>Invest Saint Lucia and Association of Music Professionals, Fashion Association, Department of Heritage and Creative Industries. The Statistical Office might be able to advise re donor partners.</p> <p>Culture Ministry should work to complete this project with close advice from creative groups. Funds should be sought from Caribbean Export or CARIFORUM Secretariat for this purpose.</p> <p>OECS diplomatic missions</p>
Public-Private Partnerships	<p>Introduce a business incubator for SMEs in the creative sector. Funding should be sought from Caribbean Export and other EU agencies/entities.</p>	<p>TEPA, Invest Saint Lucia and Association of Music Professionals, Department of Heritage and Creative Industries. The OECS-CBU and</p>

	Obtain and circulate information to Saint Lucian musicians and singers about the multitude of music festivals in European countries each summer that feature world or folk music. Assist them in contacting/liaising with these festivals in order to increase their chances of being selected to perform in European venues. (See www.efaaef.eu/en/festivals)	Caribbean Export should be approached about establishing a business incubator for creative sector SMEs..
Best Practices/Success Stories	Derek Walcott is a Nobel laureate for Literature; Ronald “Boo” Hinkson has an international profile and reputation as a jazz musician and has performed in several major metropolitan cities.	
ACTION PLAN FOR GOVERNMENT		
	Action to be Taken	Relevant Entities
Strategic Plan	The Policy and Strategic Framework for the Creative Sector – i.e. the White Paper – provides a good basis for support by government. The policies should be implemented and monitored.	Prime Minister’s Office in collaboration with Culture, Tourism and Trade officials and cultural industry stakeholders.
Market Access	<p>1. Significant market access was already granted in 26 EU states; assist creative firms and professionals that wish to take advantage of opportunities in EU states.</p> <p>2. Saint Lucia and Martinique share a long history that began in the early sixteen century. Over the years, the two countries have established many positive diplomatic, cultural, educational ties/relations with the objective to benefit its citizenry and economy in general. In June 2014, a declaration of Intention of Cooperation was signed by the two countries; it includes a range of areas including the creative industries. This is a positive first step.</p> <p>3. The GOSL should prepare a proposal for a bilateral cooperation agreement with France under the auspices of the EPA Protocol on Cultural Cooperation and negotiate it in 2016. GOSL should also make similar proposals to the United Kingdom, Germany and the Netherlands. The cooperation agreements should provide for exchanges of artists, artists in residence, training, joint creative projects, among other initiatives. They should also provide for co-productions in the audio-visual sector. These stimuli will enrich the experience of Saint Lucian “intuitives” and trained artists and will help develop the creative</p>	Ministry of Trade, Ministry of Culture in collaboration with the Cultural Foundation and local artists.

	sector in Saint Lucia. They will also make Lucian artists known in European markets and lead to commercial contracts.	
Business and Regulatory Environment	Introduce and rapidly implement the suite of laws that provide for business activity on the Internet and online networks or electronic media – Electronic Transactions Act; Data Protection Act; Computer Misuse Act. These are important for providing the legal and regulatory framework for online businesses.	Attorney General, Prime Minister's Office/Planning Department
Human resource development	<p>1. Grant more scholarships to persons wanting to study creative subjects.</p> <p>2. Introduce creative subjects and cultural awareness in the formal academic curriculum at the primary, secondary and tertiary level as part of the Education revolution. Create timetabling and other opportunities for students interested in artistic subjects also to study technical subjects (such as sound engineering) and business subjects in academic and vocational institutions.</p> <p>2. EU Member States have indicated that the Cultural Protocol in the EPA is demand driven. It is therefore critical for CARICOM countries to articulate their interest in specific areas of cultural activities. Saint Lucia should request technical and financial support at the national level to prepare proposals for requests to specific EU states for cultural cooperation activities under the EPA Protocol. These should include all the performing arts and visual arts, and provide for artists in residence, artist exchanges (in Europe and the Caribbean), training workshops and other related activities.</p>	<p>Ministries responsible for Culture and for Trade in collaboration with regional institutions/efforts.</p> <p>Ministry of Education</p> <p>Ministry responsible for Culture and Trade and EPA Implementation Unit. First step is to meet with and discuss Saint Lucia interests with European states represented in Saint Lucia – France, Germany, Finland – and then the others of interest.</p>
Finance & Incentives	<p>1. Remove or waive tariffs and ODCs on imported inputs to creative activities for bona fide creative entrepreneurs or firms. Concessions to creative firms or persons should be done through formal regulations on a predictable and transparent basis and not require individual approvals from Cabinet to avoid political influences.</p> <p>2. Establish a National Endowment Fund for the Arts in Saint Lucia to which the public and private sectors can contribute money towards</p>	Ministry of Finance in collaboration with Department of Heritage and Creative Industries and Invest Saint Lucia. This should be completed before the end of 2016, even if not within the framework of a comprehensive incentive regime for service industries.

	<p>selected EU Member States; and (b) the specifics of the regular commercial market (size, demographics, consumption patterns, etc.) for live and downloadable Caribbean music in Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Netherlands, Portugal, Spain, Sweden, United Kingdom. The market reports should explain the regulatory procedures for getting contracts, work permits, mandatory payments such as withholding taxes, and how any economic needs tests operate in practice in each jurisdiction. This exercise should also result in clear, simple and easy to follow brochures for entertainers from OECS on the opportunities and regulatory requirements in each EU country for Caribbean entertainment services, particularly live music.</p>	
Policy Coherence	<p>1. Ensure that the development of creative industries is factored into planning documents like the National Economic and Social Development Plan (Vision 2025) and Medium Term Economic Strategy Papers; and in national investment and export strategies. Ministries and agencies dealing with the creative industries should work more closely together.</p> <p>2. Introduce the necessary legislative, regulatory and administrative measures to implement Saint Lucia's commitments under the WIPO Copyright Treaty to protect intellectual property in online or digital media.</p>	<p>Ministries of Finance, Culture, Trade and Invest Saint Lucia.</p> <p>Attorney General's Office; Registry of Companies and Intellectual Property</p>
Public-Private Partnerships	<p>1. Organize and conduct creative industries trade missions to select EU Members (Germany, Netherlands, France, UK, etc.) to develop contacts in the entertainment sector and culture ministries and promote the services of the sub-region's entertainers, animators, filmmakers and fashion designers; as well as the OECS as a tourism destination. It would be best if this initiative is done in collaboration with the rest of the OECS and CARIFORUM and funded through existing EDF programs.</p> <p>2. Build a performing arts centre (Culture House) with facilities for training and rehearsals as well as an exhibition area for visual arts and crafts. This is long overdue in Saint Lucia and it will get much more use than the cricket stadium which lies idle for most of the year. Possible sources of consortium funding for the centre could be donors and friendly governments. The centre can be managed on a joint basis with creative practitioners. (There is informal talk of Taiwanese support for such an initiative but no details are available).</p>	<p>Ministry of Trade (TEPA) in collaboration with entertainment industry associations and tourism departments. Funding should be sought from Caribbean Export and TradeCom li EU-funded project management unit in Brussels.</p> <p>This will require major government and private sector collaboration.</p> <p>This requires direct attention by the Office of the Prime Minister and the Cabinet.</p>

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