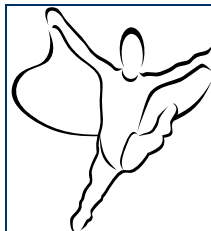


# Strategic Plan for the Entertainment Industry of Trinidad and Tobago

## FINAL REPORT

January 20, 2006



**The Music and Entertainment Industry Team of  
The Standing Committee on Business Development (SCBD)**

This report may not be quoted or used for any purpose without the written consent of the Ministry of Trade and Industry. If you need clarification or assistance in this matter, please contact La Shaun Prescott ([lprescott@tradeind.gov.tt](mailto:lprescott@tradeind.gov.tt)).

## **MEMBERS OF MUSIC AND ENTERTAINMENT INDUSTRY TEAM**

Mr. Kenny Phillips – Team Leader  
CEO  
KMP Music Group

Ms. Denise Geyette  
Manager, Cultural Promotions  
Tourism and Industrial Development Company of Trinidad and Tobago

Mr. Jean Michel Gibert  
Managing Director  
Caribbean Music Group

Mr. Ainsworth Mohammed  
Manager  
Exodus Steel Orchestra

Mr. Mungal Pattesar  
Principal  
Caribbean School of East Indian Music

Mr. Anthony Woodroffe  
Director  
The Brass Institute

Ms. Annelle Joachim  
Business Development Officer, Trade Assistance Unit  
Business Development Company

Ms. La Shaun Prescott  
Industry Specialist  
Ministry of Trade and Industry

Ms. Jo-anne Tull - Consultant  
Lecturer  
Centre for Creative and Festival Arts  
The University of the West Indies

# TABLE OF CONTENTS

<b>LIST OF TABLES .....</b>	<b>3</b>
<b>LIST OF FIGURES .....</b>	<b>4</b>
<b>Abbreviations .....</b>	<b>5</b>
<b>Executive Summary .....</b>	<b>8</b>
<b>Introduction.....</b>	<b>2</b>
<b>1.0 Overview of the Global Cultural Industry .....</b>	<b>5</b>
1.1 Nature of Cultural Industries .....	5
1.2 Market Size and Industry Earnings.....	7
1.3 Economic Impact of Cultural Industries .....	12
1.4 International Institutional and Regulatory Environment .....	16
1.5 Global Impacts on Trinidad and Tobago Entertainment Industry .....	45
<b>2.0 Trinidad and Tobago Entertainment Industry.....</b>	<b>47</b>
2.1 Analysis of the Music Industry – Industrial Structure and Context.....	47
2.2 Analysis of the Carnival Industry – Industrial Structure and Context.....	70
Analysis of Visual and Performing Arts – Industrial Structure and Context .....	85
2.3 The Visual Arts Sector.....	86
2.4 The Theatre Industry.....	93
2.5 The Dance Industry.....	98
<b>3.0 Institutional Framework for the Entertainment Industry.....</b>	<b>102</b>
3.1 Ministry of Community Development, Culture and Gender Affairs.....	102
3.2 Ministry of Finance (MOF) .....	102
3.3 Ministry of Planning and Development - Central Statistical Office.....	104
3.4 Ministry of Legal Affairs (MOLA) - Intellectual Property Office .....	104
3.5 Ministry of Science, Technology and Tertiary Education (MSTTE) .....	105
3.6 Ministry of Tourism.....	107
3.7 The Ministry of Trade and Industry.....	107
3.8 Office of the Prime Minister.....	110
3.9 Tobago House of Assembly - Division of Culture .....	111
3.10 Caribbean Festival of Arts (CARIFESTA).....	111
3.11 San Fernando Arts Council.....	111
<b>4.0 Economic Analysis of the Entertainment Industry.....</b>	<b>114</b>
<b>5.0 Strategic Analysis of the Entertainment Industry .....</b>	<b>118</b>
5.1 General TOWS Analysis of the Entertainment Industry .....	118
5.2 TOWS Analysis of the Music Industry.....	119
5.3 TOWS Analysis of the Carnival Industry .....	120
5.4 TOWS Analysis of the Visual Arts Sector .....	121
5.5 TOWS Analysis of the Performing Arts.....	122
<b>6.0 Strategic Plan for the Entertainment Industry.....</b>	<b>123</b>

6.1	Mission.....	123
6.2	The Vision.....	123
6.3	Strategy Recommendations .....	123
<b>7.0</b>	<b>Conclusion: Why Invest in the Cultural Industries.....</b>	<b>132</b>
	<b>BIBLIOGRAPHY.....</b>	<b>134</b>
	<b>Appendices.....</b>	<b>i</b>
	I. Persons Consulted.....	i
	II. Report on the Stakeholders’ Meeting on the Music and Entertainment Industry of Trinidad and Tobago.....	i
	III. Careers in the Entertainment Industry .....	i
	IV. Data Elements Used to Guide Entertainment Industry Survey .....	i

## LIST OF TABLES

TABLE 1: CULTURAL INDUSTRIES DEFINED.....	5
TABLE 2: TOP SIX GLOBAL CULTURAL INDUSTRY CORPORATIONS, AT DECEMBER 2004.....	8
TABLE 3: MARKET SIZE & INDUSTRY EARNINGS: SELECT INDUSTRIES .....	10
TABLE 4: US COPYRIGHT INDUSTRIES VALUE-ADDED TO GDP, 1997-2001 .....	13
TABLE 5: UK CREATIVE INDUSTRIES VALUE-ADDED TO GDP, 2000-2002.....	14
TABLE 6: AUSTRALIA’S COPYRIGHT INDUSTRIES’ CONTRIBUTION TO GDP .....	14
TABLE 7: CULTURAL INDUSTRIES CONTRIBUTION TO SELECT LATIN AMERICA ECONOMIES .....	16
TABLE 8: EXAMPLES OF REGULATORY & POLICY FRAMEWORKS GOVERNING CULTURAL INDUSTRIES .....	18
TABLE 9: WTO GATT RULES GOVERNING CULTURAL GOODS.....	21
TABLE 10: WTO GATS RULES GOVERNING CULTURAL SERVICES.....	22
TABLE 11: EXAMPLES OF COLLECTING SOCIETIES WORLDWIDE .....	45
TABLE 12: TRINIDAD & TOBAGO MUSIC GENRES & SAMPLE OF RECORDING ARTISTS .....	48
TABLE 13: SAMPLE OF MUSIC PRODUCTION IN GOSPEL .....	49
TABLE 14: NO. OF PERFORMING ARTISTS ACCORDING TO SELECTED GENRES.....	50
TABLE 15: 2004 LIVE PERFORMANCE FEES, LOCAL MARKET.....	51
TABLE 16: TRINIDAD & TOBAGO CALYPSO TENTS AND CAST SIZE, 2004.....	52
TABLE 17: EXPENSES COVERED BY PROMOTERS IN DIASPORIC MARKETS .....	53
TABLE 18: OVERSEAS PERFORMANCES, 1998 COMPARED TO 2003 .....	53
TABLE 19: STEELPAN IMPORTS, 2001 – 2003 (TT\$).....	54
TABLE 20: STEELPAN EXPORTS, 2001 – 2003 (TT\$) .....	54
TABLE 21: FM RADIO STATIONS AND GENRES OF MUSIC PLAYED .....	56
TABLE 22: SURVEY OF PROGRAMME CONTENT ON TELEVISION CHANNELS .....	56
TABLE 23: COTT DOMESTIC DISTRIBUTIONS, 2000 – 2003 (TT\$) .....	58
TABLE 24: COTT’S FOREIGN COLLECTIONS, 2000 – 2003 (US\$) .....	59
TABLE 25: COTT’S INCOME FROM PERFORMANCE LICENSING, 2001 & 2002 (TT\$).....	59
TABLE 26: ESTIMATED PRODUCTION COSTS OF MAS BANDS ACCORDING TO SIZE .....	71
TABLE 27: CAR RENTAL DAILY RATES: CARNIVAL PERIOD AND OFF-SEASON.....	75
TABLE 28: DAILY STANDARD ACCOMMODATION RATES: CARNIVAL PERIOD AND OFF-SEASON.....	75
TABLE 29: REPEAT AND FIRST TIME VISITORS TO CARNIVAL 2004 BY COUNTRY OF RESIDENCE...76	76
TABLE 30: VFRS FOR CARNIVAL 2004, BY COUNTRY OF RESIDENCE .....	77
TABLE 31: CARNIVAL VISITORS AND EXPENDITURES, 1999 - 2004 .....	79
TABLE 32: ECONOMIC IMPACT OF DIASPORIC CARNIVALS, 2002 .....	79
TABLE 33: SURVEY OF DANCE SCHOOLS IN TRINIDAD AND TOBAGO .....	99
TABLE 34: PERFORMANCE FEE RANGE FOR DANCERS & CHOREOGRAPHERS.....	100
TABLE 35: EMPLOYMENT AND REVENUE GENERATED IN THE ENTERTAINMENT INDUSTRY OF TRINIDAD AND TOBAGO .....	115
TABLE 36: COMPARISON OF EMPLOYMENT IN TARGETED INDUSTRIES .....	117
TABLE 37: COMPARISON OF EMPLOYMENT IN TARGETED INDUSTRIES .....	117
TABLE 38: BUDGET FOR IMPLEMENTATION OF THE STRATEGIC PLAN FOR THE ENTERTAINMENT INDUSTRY .....	131

## LIST OF FIGURES

FIGURE 1: EXAMPLES OF “NEW MEDIA” CULTURAL INDUSTRIES.....	6
FIGURE 2: WORLD TRADE OF CULTURAL GOODS (US\$ MILLIONS), 1980-1998 .....	12
FIGURE 3: KEY STATS SINGAPORE’S CREATIVE INDUSTRIES, 2000.....	15
FIGURE 4: RIGHTS ADMINISTERED BY COLLECTING SOCIETIES .....	43
FIGURE 5: STRUCTURE OF THE TRINIDAD & TOBAGO MUSIC INDUSTRY .....	47
FIGURE 6: STRUCTURE OF THE CARNIVAL INDUSTRY .....	70
FIGURE 7: VISITOR ARRIVALS FOR CARNIVAL PERIOD, 2001 – 2004.....	76
FIGURE 8: WILLINGNESS TO RECOMMEND TRINIDAD & TOBAGO BY MAIN DIASPORIC MARKETS	77
FIGURE 9: DIASPORIC CARIBBEAN CARNIVALS.....	80
FIGURE 10: STRUCTURE OF THE VISUAL ARTS SECTOR.....	86
FIGURE 11: STRUCTURE OF THE THEATRE INDUSTRY.....	93
FIGURE 12: STRUCTURE OF THE DANCE INDUSTRY .....	98
FIGURE 14: CHART SHOWING REVENUE GENERATED IN THE ENTERTAINMENT INDUSTRY OF TRINIDAD AND TOBAGO .....	116
FIGURE 15: CHART SHOWING EMPLOYMENT GENERATED IN THE ENTERTAINMENT INDUSTRY OF TRINIDAD AND TOBAGO .....	116
FIGURE 16: ORGANIZATIONAL CHART OF THE TRINIDAD AND TOBAGO ENTERTAINMENT COMPANY LTD.....	127

## Abbreviations

ACEM	Arts and Cultural Enterprise Management
ACP	African, Caribbean and Pacific countries
ASCAP	American Society of Composers, Authors and Publishers
BDC	Business Development Company Limited
CARICOM	Caribbean Community
CARIFESTA	Caribbean Festival of Arts
CCFA	Centre for Creative and Festival Arts
CCL	Caribbean Copyright Link
CD	Compact Disc
CDATT	Chutney Dancers Association of Trinidad and Tobago
CISAC	International Confederation of Societies of Authors and composers
CJATT	Carnival/ Cultural Judges Association of Trinidad and Tobago
CLCL	Caribbean Leasing Company Limited
COTT	Copyright Organization of Trinidad and Tobago
CMF	Canada Music Fund
COSTAATT	The College of Science, Technology and Applied Arts of Trinidad and Tobago
CSO	Central Statistical Office
CSOTT	Chutney Soca Organization of Trinidad & Tobago
CRTC	Canadian Radio-television and Telecommunications Commission
DMA (US)	Direct Marketing Association
DCMS (UK)	Department for Culture, Media and Sport
DVD	Digital Video Disc
EU	European Union
FTAA	Free Trade Agreement of the Americas
GATT	General Agreement on tariffs and Trade
GATS	General Agreement on Trade and Services
GDP	Gross Domestic Product
GORTT	Government of the Republic of Trinidad and Tobago
ICCA	International Caribbean Carnival Association
IFPI	International Federation of Phonographic Industries
IFRRO	International Federation of Reprographic Rights Organizations
IIPA	International Intellectual Property Alliance
ILO	International Labour Organization
IPRS	Indian Performing Rights Society
ISIC	International Standard Industrial Classification
ISWC	International Standard Work Code
ITC	International Trade Centre
JASRAC	Jamaican Association of Composers, Authors, and Publishers,
MCPS	UK Mechanical Protection Copyright Protection Society
MEIT	Music and Entertainment Industry Team
MOC	Ministry of Community Development, Culture and Gender Affairs
MOF	Ministry of Finance
MOLA	Ministry of Legal Affairs
MOT	Ministry of Tourism
MSTTE	Ministry of Science, Technology and Tertiary Education
MTI	Ministry of Trade and Industry
NAICS	North American Industrial Classification Systems

NCC	National Carnival Commission of Trinidad and Tobago
NCBA	National Carnival Bands Association of Trinidad and Tobago
NCDF	National Carnival Development Foundation
NDA	National Dance Association of Trinidad and Tobago
NDATT	National Drama Association of Trinidad and Tobago
NLCB	National Lottery Control Board
NTA	National Training Agency
OECD	Organization for Economic Cooperation and Development
OST&T	Orchestral Society of Trinidad and Tobago
PEST	Political Economic Social Technological
PRS	Performing Rights Society
REACT	The Radio Emergency Associated Communications Team
RIAA	Recording Industry Association of America
RIATT	Recording Industry Association of Trinidad and Tobago
SCBD	Standing Committee on Business Development
SODRAC	Society for Reproduction Rights of Authors, Composers ad Publishers Canada
SPADEM	Societe de la Propriete Artistique et des Dessins et Modules
TATT	Telecommunications Authority of Trinidad and Tobago
TDC	Tourism Development Company
THA	Tobago House of Assembly
TIDCO	Tourism and Industrial Development Company of Trinidad and Tobago
TRIPs	Trade-related aspects of intellectual property rights
TTCO	Trinidad and Tobago Copyright Organization
TTNVQ	Trinidad and Tobago National Vocational Qualification
TTPBA	Trinidad and Tobago Publishers and Broadcasters Association
TTW	Trinidad Theatre Workshop
TUCO	Trinbago Unified Calypsonians Organization
TVET	Technical and vocational education and training
UNCTAD	United Nations Conference on Trade and Development
UNESCO	United Nations Educational, Scientific and Cultural Organization
UTT	The University of Trinidad and Tobago
UWI	The University of the West Indies
WIPO	World Intellectual Property Organization
WTO	World Trade Organization
YTEPP	Youth Training and Employment Partnership Programme



## **Acknowledgements**

The Music and Entertainment Industry Team would like to thank the Ministry of Community Development, Culture and Gender Affairs as well as the Ministry of Trade and Industry, without whose input this report would not have been possible. The team is especially grateful to Ms. Joanne Tull, Lecturer of the Centre for Creative and Festival Arts who worked as the Consultant for the team. Lastly, a special thanks to those members of the public and private institutions, as well as the individual artistic entrepreneurs with whom we consulted in our research and to whom this report is dedicated.

## **Executive Summary**

Trinidad and Tobago can boast of having a diverse mix of arts and cultural activities, some of which have expanded in composition, size, and structure to become the main sectors of a growing cultural industry. In the global economy, cultural industries have become major catalysts of growth. This has been spurred by technology acting as the main driver of transformation. A critical underpinning of the cultural industries is copyright, which secures the economic/ commercial value of cultural commodities. However, the copyright system remains largely challenged by piracy, as opportunities to infringe become easier with new modes of technology. In response, developed-world governments have implemented stringent legislation and policies that would allow their cultural industries to effectively defend and trade their copyrights.

Conglomeration of the cultural industries has resulted in just six corporations accounting for 70% of the global market with sales totaling US\$165.94 billion and a collective net income of approximately US\$26 billion. Due to this heavy market concentration, developing-world cultural enterprises must invest in niche markets, and engage in strategic collaborations in those targeted markets to establish a competitive edge. Global market demand for cultural commodities continues to rise steadily, particularly within the entertainment and media industry. Although countries adopt different methodological approaches to measuring the contribution of cultural industries to the global economy, estimates show that the cultural industries are worth US\$2.2 trillion growing at an annual rate of 5% (Howkins 2001). UNESCO 2000 reports that annual world trade in cultural industries was US\$387.9 million in 1998.

Overall, regulation in the cultural industries is achieved through international treaties and trade rules, national laws and policies that reinforce international treaties, regulations established by non-governmental institutions, and copyright collection societies. Advocates for cultural diversity initially sought exemptions for cultural goods and services from international trade rules, but more recently have lobbied for an International Instrument on Cultural Diversity to safeguard their domestic cultural policies from trade disciplines. UNESCO has now taken a lead role in crafting this new international instrument on Cultural Diversity.

Throughout the world there are various models of providing support for the creative industries. Canada's approach to institutional capacity building for its cultural industries is a useful benchmark and can be illustrated as a best practice. The Canadian government, through a number of cultural institutions, utilizes a range of tax measures, financial incentive schemes, programme support mechanisms, content requirements, intellectual property tools and legislation to build up its cultural industries.

Trinidad and Tobago has a complex institutional framework for the entertainment industry with several overlaps in the activities of the various institutions as well as gaps that need to be filled. In addition, the industry suffers from a number of weaknesses including weak distribution channels, a lack of documentation and economic measurement, as well as a lack of strategic marketing competencies. Added to this, the industry must face international threats in that there is minimum access to funding, regional competition is increasing and the local broadcast media generally neglect local arts and culture. Nevertheless, the industry remains poised to capitalize

on its main strengths of having talent and creativity that holds tremendous international appeal, and having expanding participation by youth in various aspects of music and entertainment. The opportunities to be taken advantage of are significant – there is now a rising global media interest in Caribbean culture, including Trinidad carnival, which has manifested into a Grammy category being allocated to Soca in the near future.

The results of the Entertainment Industry Survey conducted by the Ministry of Trade and Industry showed that the Entertainment Industry is estimated to generate TT\$351.8 million annually and employs some 10,854 persons. These conservative figures provide a snapshot of a moving target as the figures would not remain at this level for very long. The employment and revenue generated in the various sectors are detailed in the table below:

<b>Sector</b>	<b>Employment</b>	<b>Revenue</b>
Music	5,602	\$169,465,606
Carnival	3,596	\$153,587,200
Visual Art	728	\$17,806,450
Theatre	454	\$6,201,140
Dance	474	\$4,704,470
<b>TOTAL</b>	10,854	\$351,764,866

In comparison with the other countries, which were reviewed earlier, the music industry of Trinidad and Tobago (generating US\$26.9 million for the music industry) has not been as successful as the Jamaican industry. The Jamaican music industry generates US\$52.5m and employs 15,000 persons. The Barbados music industry is estimated to have earned approximately US\$15 million in 1999 while the music industry in the OECS, which is largely based on festival tourism, accounts for over US\$20 million in 2000.

In comparison with the other industries, which have been targeted for development by the Standing Committee on Business Development, the Entertainment industry compares quite favourable with regard to employment but appears lower in rank for revenue.

<b>Industry</b>	<b>Number Employed</b>
Plastics, Printing and Packaging	11,000
Entertainment	10,854
Food and Beverage	9,452
Fish and Fish Processing	6,054
Merchant Marine	2,970
Yachting	1,250
Film	200

<b>Industry</b>	<b>Revenue Generated TT\$m</b>
Plastics, Printing and Packaging	1,300
Food and Beverage	1,174

Fish and Fish Processing	647.0
Merchant Marine	441.3
Entertainment	351.8
Yachting	152.6
Film	28.0

The research has shown that the Trinidad and Tobago entertainment industry thrives in talent, creativity and product. The time is thus opportune to develop and implement a policy framework for the entertainment industry to ensure global competitiveness. The mechanism to achieve this will be the Trinidad and Tobago Entertainment Company Ltd. (TT Ent), managed by experts in the industry. This company will be responsible for facilitating the development of a globally competitive Entertainment Industry (including music, dance, theatre and visual arts). The objectives of TT Ent are as follows:

- To facilitate international exposure of our local entertainers;
- To market and promote the national creativity;
- To ensure that Trinidad and Tobago is identified not only as the home of Steel Pan but also as the home of soca, chutney and calypso;
- To assist local entertainers and artists in accessing funding for projects;
- To facilitate private sector investment both locally and abroad into the entertainment industry; and
- To ensure proper documentation and archiving of our works.

The main projects of TT Ent will include:

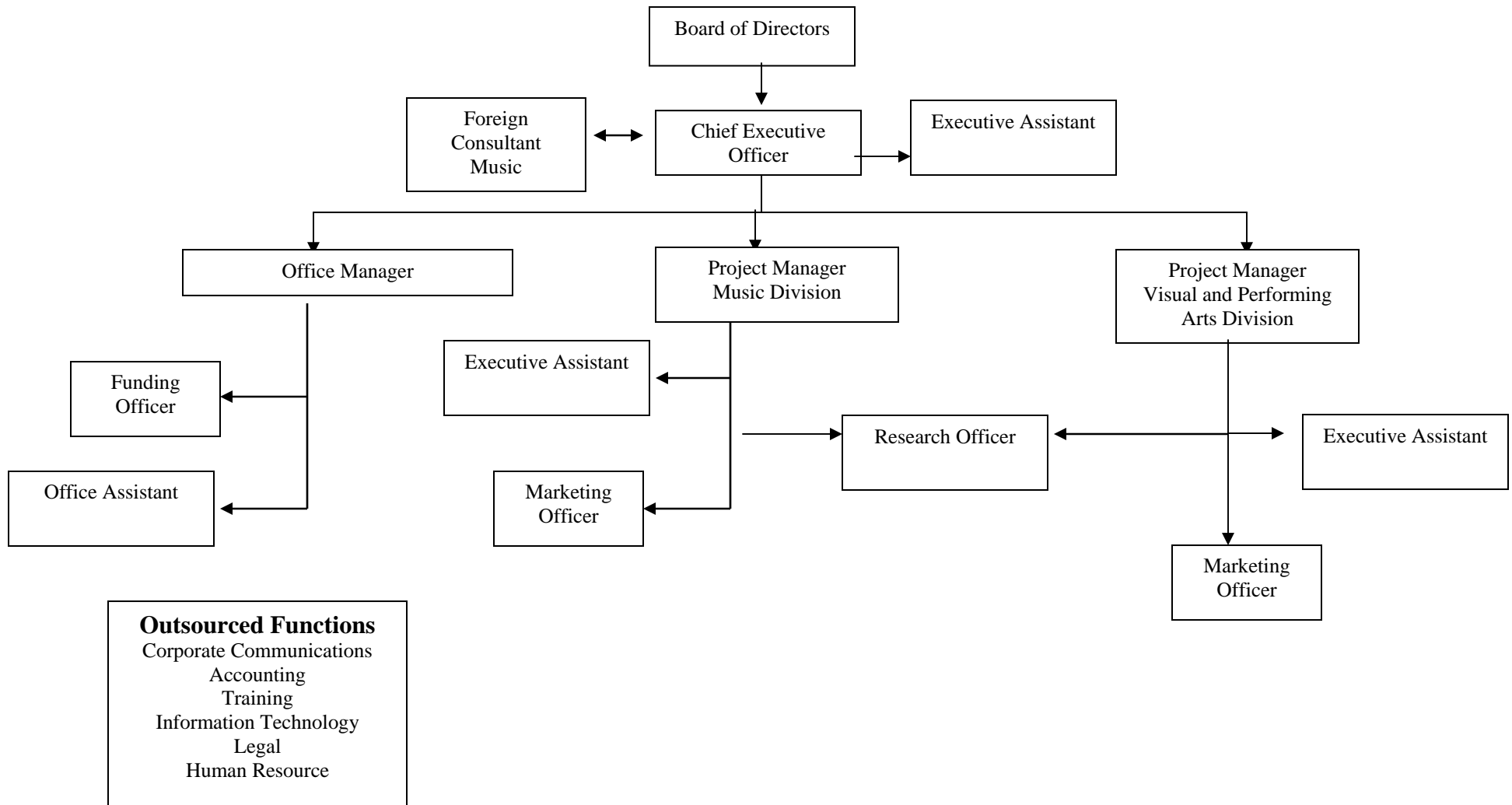
- A *Revolving Investment Scheme* for artists to aid in major projects in market development; music production, video production, theatrical productions and touring, as well as implementation of export plans;
- *Familiarization Tours* of the country for international executives in the music industry and successful Trinbagonian visual and performing artists living abroad to assist in exporting our local talent and products;
- *Archiving, Research and Development* to facilitate proper archiving of our creative works as well as continuous assessment of the growth and development of the entertainment industry through benchmarking with international developments;
- *Marketing and Promotion* to establish and maintain global linkages for the industry using the targeted marketing by a local music expert living abroad, and purchasing airtime on international mainstream broadcast media. The company will also facilitate the annual participation of artists in *International Music Festivals* such as MIDEM;
- Joint venture projects to stage *International Promotional Music Concerts* and *Major Theatrical Productions* abroad;
- *TT Ent Online* for downloads of the collected archives of our local soca, chutney, calypso and other genres of music and music videos, as well as visual art, dance and theatrical productions.
- A national database of artistes and cultural entrepreneurs as an *Entertainment Directory*.

Revenue streams for the company are expected to be derived from the following areas:

- Project management fees;
- Profits negotiated in contracts for artists' distribution deals;
- Payments for online downloads; and
- Repayments to the Revolving Investment Scheme.

There are several other areas of intervention, which has been recommended by the industry stakeholders. These areas will be more appropriately addressed by the other existing Ministries and agencies.

The Organization Chart of the Trinidad and Tobago Arts Company is provided below.



The budget for implementation of the Strategic Plan for the Entertainment Industry is outlined below.

	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>
<b>Recurrent Expenditure</b>	<b>3,589,400</b>	<b>3,787,260</b>	<b>4,355,349</b>
Staffing	1,524,000	1,752,600	2,015,490
Outsourced Functions	449,000	507,000	583,050
Consultants (6 month contract)	756,000	869,400	999,810
Board of Directors	153,600	176,640	203,136
Equipment	288,000	0	0
Accommodation	360,000	414,000	476,100
Operating Expenses	58,800	67,620	77,763
<b>Projects</b>	<b>5,173,000</b>	<b>7,161,450</b>	<b>8,245,668</b>
<b>Music Division</b>	<b>3,075,000</b>	<b>3,536,250</b>	<b>4,066,688</b>
Revolving Investment Scheme	1,050,000	1,207,500	1,388,625
Familiarization Tours	200,000	230,000	264,500
Music Trade Fairs and Festivals (MIDEM)	600,000	690,000	793,500
Research	250,000	287,500	330,625
International Promotional Music Concert	600,000	690,000	793,500
Project Administration Costs	375,000	431,250	495,938
<b>Visual and Performing Arts Division</b>	<b>1,898,000</b>	<b>3,395,200</b>	<b>3,904,480</b>
Revolving Investment Scheme	1,050,000	1,207,500	1,388,625
Familiarization Tours	200,000	230,000	264,500
Touring Theatrical Production	250,000	1,500,000	1,725,000
Research	50,000	57,500	66,125
Updating of Entertainment Directory	100,000	115,000	132,250
Project Administration Costs	248,000	285,200	327,980
Internal Marketing	200,000	230,000	264,500
<b>Total Expenditure</b>	<b>8,762,400</b>	<b>10,948,710</b>	<b>12,591,017</b>

# Introduction

## Terms of Reference

The principle aim of this report is to formulate a strategic framework for the Trinidad and Tobago entertainment industry to contribute significantly towards the country's diversification efforts away from the oil and energy sector, and at the same time encourage and promote artistic endeavour and creativity throughout Trinidad and Tobago.

The report entails a series of analyses along with the main elements of that framework. These are as follows:

1. An industry profile of the global cultural industry, identifying the context, trends, economic performance, institutional framework and impacts on the entertainment context of Trinidad and Tobago.
2. Situational analyses of the sectors within the Trinidad and Tobago entertainment industry, which provides an update on the industry's domestic and, where possible, export performance;
3. Outline of institutional framework describing the role of various institutions in the development of the entertainment industry;
4. Strategic analysis, which outlines the strengths, weaknesses, challenges and prospects within the industries;
5. The strategic initiatives required for the sectors to successfully penetrate the export market; and
6. The likely positive impacts of utilizing a strategic framework of this nature.

## Methodology

Although the team was called the Music and Entertainment Industry Team, the definition used by the team includes the music sector as a subset of the entertainment industry and as such throughout this report, reference will be made only to the entertainment industry. The following outline illustrates the definition of entertainment industry used by the Team.



## Components of the Entertainment Industry

### Music

- Recording
  - Producers
  - Studios
  - Engineers
  - Labels
- Rock
  - Bands
- Pan
  - Traditional
  - Soloists
  - Conventional
- Calypso
  - Traditional
  - Rapso
  - Ragga
  - Chutney
  - Soca
- Indian
  - Classical
  - Chutney
- European
  - Classical
- Afro/American
  - Jazz
- Contemporary
  - Rap
  - Hip-Hop
  - Gospel
  - R&B

### Drama

### Art

- Electronic Art
  - Video Houses
- Literary Art
  - Novelists
  - Poets
  - Playwrights
- Visual Arts
  - Fabric Art
  - Painters
  - Sculptors
  - Photographers

### Dance

- Classical
- Ballroom
- Contemporary/ Modern
- Jazz
- Folk
- Indian

### Businesses

- Performance Venues
- Promotion companies
- Food/ Drink Concessions
- Advertising Agencies
- COTT
- Music Stores
- Dance Stores
- Art Supply Stores
- Book Stores
- Art Galleries
- Art Schools
- Music Schools
- Dance Schools
- Drama Schools

Two strategic management tools are utilized to develop the strategic assessment and formulate the strategic plan. These are:

1. Environmental scanning, which identifies the key external forces of influence on Trinidad and Tobago's entertainment industry; and
2. Tows analyses, which identify the industries' existing challenges (threats); positive external prospects (opportunities); areas of relative disadvantage (weaknesses); and core competences (strengths).

These analyses are developed, using four main sources of information:

1. Preliminary field research comprising individual interviews as well as group consultations with some of the artists and cultural entrepreneurs in the music, carnival, visual arts, dance and theatre sectors (see Appendix I);
3. Statistical data extracted from the reports of the CSO, as well as from the websites of COTT and TUCO have been used to update sectoral performance. To date, statistical data can only be drawn in relation to some aspects of the entertainment industry.
4. Although very limited research has been done on the other sectors of the entertainment industry, the range of studies on the music industry of Trinidad and Tobago<sup>1</sup>, collectively provide an extensive assessment of that sector. Preliminary field research in the music industry indicates that much of the literature still holds currency. Thus, the findings of these various pieces of research have also informed the situational analysis.

### **Delimitations and Limitations**

This report refers to the entertainment industry of Trinidad and Tobago as comprising music, visual arts, the performing arts (dance and theatre) and carnival, as identified by the MEIT. These areas have been selected as key sectors for strategic intervention, and represent the first group of sectors within the cultural industries to be targeted for industrial development. Strategic development of the film industry and Pan are addressed in separate reports entitled “Strategic Plan for the Film Industry of Trinidad and Tobago” (2005) and “Pan Strategic Plan for Sustainable Development” (2004), respectively. Consequently, this report focuses exclusively on music, visual arts, theatre, dance and carnival.

Resources for the collection of primary data were somewhat limited since there has not been a tradition of formal statistical data collection for the entertainment industry in Trinidad and Tobago. To date, it is difficult to determine the number of persons employed; the number of cultural enterprises within each sector; revenues earned within each sector; as well as the foreign exchange earnings generated by these industries. In addition, there was unwillingness from some artists and cultural practitioners to participate in the MEIT consultations.

Secondary information was obtained from other studies and reports, most of which have focused mainly on the music industry of Trinidad and Tobago and of the wider Caribbean. Documentation on the other sectors remains limited. Internet sources were utilized where possible.

---

<sup>1</sup> Refer to the Bibliography for a full listing of the studies surveyed.

## 1.0 Overview of the Global Cultural Industry

### 1.1 Nature of Cultural Industries

Cultural industries have become major catalysts of growth in the global economy. They have moved closer to the centre of economic action across the world, and thus can no longer be deemed secondary to the ‘real’ economy (Hesmondhalgh 2002:1). Perhaps more than any other type of production, cultural production spawns a wide variety of products and services from architecture to festivals and software production (see Table 1), all of which interact in an industrial system of production and circulation.

**TABLE 1: CULTURAL INDUSTRIES DEFINED**

	<b>Cultural Goods</b>	<b>Cultural Services</b>
Definitions	Consumer goods that convey ideas, symbols and ways of life. They inform or entertain, contribute to build collective identity and influence cultural practices. They are protected by copyright.	Activities aimed at satisfying cultural interests or needs. They typically consist of the overall set measures and supporting facilities for cultural practices that are made available to consumers. They are protected by copyright.
Examples	Art, books, magazines, newspaper, CDs, multimedia products, software, video games, films, audio-visual programmes, animation, cartoons crafts; fashion designs, architectural plans, costumes, toys, games, craft; radio; television; stereo	Performing arts services; music production; music publishing; performances and cultural events services; cultural information and preservation (libraries, documentation centres and museums); advertising; architecture; internet services; copyright collective services
<b>Major Cultural Industries</b>		
Architecture; advertising; art; broadcasting; consumer electronics; craft; fashion; festivals and cultural events; film industry; internet industry; mass media; music industry; performing arts; print and electronic publishing; sport; software; toys and games; video games		

NB. Definitions above serve as a basic guide, since rapid emergence of new technologies make it difficult to maintain set distinctions between cultural goods and cultural services.

**Sources:** Definition of cultural industries based on David Hesmondhalgh (2002) *The Cultural Industries* p. 12 and John Howkins (2001) *The Creative Economy*, p. 116; Definition of cultural goods and cultural services drawn from UNESCO (2005) “Culture, Trade, and Globalization: What Do We Understand by Cultural Industries”; [www.unesco.org/culture/industries/trade/html\\_eng](http://www.unesco.org/culture/industries/trade/html_eng).

Technology has spurred tremendous growth in the cultural industries, for the most part as the main driver of transformation. In particular, digitalization (digitization) has created a range of new opportunities for creative expression, production and distribution; and has propelled new modes of business<sup>2</sup>. Doyle (2002:144) notes that digitization has facilitated the development of new cultural industries (“new media”), and continues to stimulate growth in other cultural industries such as computer software, telecommunications, advertising, film production, music production and distribution and architecture. Among these, the computer and video game industry is perhaps the most mature and developed. Trade journal Screen Digest (1998) estimates that the global interactive leisure software market is now worth more than US\$14 billion, with computer and video game companies turning over no less than US\$250 million annually<sup>3</sup> (Doward and Islam, 1999).

### **FIGURE 1: EXAMPLES OF “NEW MEDIA” CULTURAL INDUSTRIES**

- Video game & computer game production and distribution
- Desk-top publishing
- Internet-based media provision
- Electronic publishing
- Digital animation
- Digital architectural design
- E-marketing of cultural industries

A critical underpinning of the cultural industries is copyright, which secures the economic/commercial value of cultural commodities. Copyright safeguards the process of knowledge and technology by which these products and services are produced, distributed and traded. Thus, cultural industries now operate within what may be characterized as a new “techno-economic”<sup>4</sup> business context that is driven by technological shifts and the business of copyright. At every stage of the circuit of cultural production and dissemination, the intellectual property component is now the key commodity and basis of wealth. As technology continues to change, the value of intellectual property increases. For example, it has been observed that the music industry has undergone some redefinition, having moved from “an industry primarily selling [manufactured] commodities”, to becoming an industry of services, in which “baskets of rights” are exploited (Frith 1993). The same can be said of other cultural industries. In 1999, US licensing and royalty fees contributed as much as US\$37 billion to GDP, making this the highest contributing “financial driver” in that year (Kupiec 2002:2). And so copyright has become a primary competitive resource and the basis of competitive advantage in the cultural industries.

On the flipside, cultural industries and the copyright system remain largely challenged by piracy, as opportunities to infringe become easier with new modes of technology. The proliferation of reproduction equipment and the advent of digital technology present new options of use that also leave cultural industries vulnerable to exploitation. Piracy has begun to erode the income potential of the cultural industries. For example, in its 2004 “Commercial Piracy Report”, IFPI estimates that the global pirate market for recorded music totaled some 1.7 billion units in 2003 to a value of US\$4.5 billion (2004:2-3).

---

<sup>2</sup> Primary examples of this are e-commerce and e-business which have become important modes of transaction within the cultural industries and in the wider global economy.

<sup>3</sup> This estimate is based on 1997 revenue figures for top companies around the globe.

<sup>4</sup> The term, coined by Carlotta Perez (2002), refers to shifts in business and economic practices that coincide with new modes of technology to create a new techno-economic paradigm.

In response, developed-world governments in particular, have implemented stringent legislation and policies that would allow their cultural industries to effectively defend and trade their copyrights<sup>5</sup>. Policy infrastructure is reinforced by institutional support from industry and trade associations within the cultural industries that have taken an active role in the fight against piracy.

Overall, this is a highly dynamic environment, where consumer demand is uncertain and infringement poses a severe challenge. Nevertheless, product/service development, creativity and innovation remain the bedrock and impetus for continual growth. Technology aside, growth is also driven by brand appeal and effective marketing strategies, in spite of general market uncertainties.

## **1.2 Market Size and Industry Earnings**

Throughout the 1990s, cultural industries have undergone intense strategic restructuring that has resulted in a marked presence of large corporations dominating cultural markets. Acceleration towards a global free market economy and international competition along with the convergence in technology between media and other industries, have caused many cultural-industry firms to exploit existing economies of scale and scope by joining forces through takeovers, mergers, and other strategic alliances. With the continued erosion of traditional market boundaries, market concentration and cross-industry ownership within several related industries has become an established trend within the global cultural industry market.

---

<sup>5</sup> For a listing of national copyright laws and policies, refer to UNESCO web portal <http://portal.unesco.org/culture/en/ev>.

**TABLE 2: TOP SIX GLOBAL CULTURAL INDUSTRY CORPORATIONS, AT  
DECEMBER 2004**

<b>Company</b>	<b>Revenue (Billion)</b>	<b>Subsidiaries/Affiliations</b>
1. Time Warner Inc. (New York, US)	US\$42.09	America Online (Advertising.com Inc., America Latin America, AOL (UK) Ltd., AOL Web Access Group); Warner Bros.; Time Warner Cable
2. The Walt Disney Co. (California, US)	US\$30.75	ABC, ESPN, A&E Television Networks, 10 broadcast TV stations, more than 70 radio stations; Walt Disney Studios; Miramax; Walt Disney Parks & Resorts; Walt Disney Internet Group (ABC.com, Disney Online, ESPN.com)
3. Vivendi Universal S.A. (France)	US\$29.03	NBC Universal; Canal+ Group; Universal Music Group; Vivendi Universal Games; Groupe SFR Cegetel
4. Viacom (New York)	US\$22.53	BET; CBS; Paramount Pictures; United Paramount Network (UPN); MTV Networks (MTV, VH1, Nickelodeon); Showtime Networks, Comedy Central; Paramount Television, King World, 39 TV stations; Simon & Schuster, Infinity Broadcasting (more than 180 broadcasting); internet holdings; National Amusements theatres
5. Bertelsmann AG (Germany)	US\$21.09	Random House; Sony BMG Music Entertainment; Gruner+Jahr; RTL Group; Arvato media services; book and music clubs; online retail channels
6. The News Corp. Ltd. (New York, US)	US\$20.45	HarperCollins; Fox Entertainment Group; Fox Broadcasting (with over 200 US affiliates); Twentieth Century Fox; The DIRECTV Group; 35 US TV stations and cable and satellite operations in Asia, Australia, Europe, and Latin America

Source: [www.forbes.com](http://www.forbes.com) "The A List" accessed 03/30/2005; [www.hoovers.com](http://www.hoovers.com) "Fact Sheet", accessed 03/29/2005.

"Conglomeration" of the cultural industries evolved primarily during the 1990s. According to Greco (1996: 5) there were 557 reported media business acquisitions between the period 1990-1995. By 2000, there existed a small number of transnational corporations with enormous market power. Financial analysis indicates that there are currently six corporations dominating the global cultural industries market (see Table 3). To date, these firms account for over 70% of the global market, with sales totaling US\$165.94 billion and a collective net income of approximately US\$26 billion ([www.hoovers.com](http://www.hoovers.com)).

The "Big Six" have also attained global dominance in the cultural industries through vertical integration of "new media" companies across the cultural industries spectrum, which has allowed them to transition into the digital age and maintain their top positions in the cultural industries (see Table 3). In addition, these six corporations have significant presence in North America, Europe and Latin America, and have secured strong footholds in other markets around the world through intense marketing and advertising strategies, the mass media, and the Internet. Thus, content and the circulation of content are also the basis of competitive advantage within the global cultural market.

The implications of conglomeration and heavy market concentration on emerging cultural industries, particularly in developing countries are far-reaching. In terms of market development, it is difficult for developing-world cultural enterprises to simply launch into the global cultural market, given the heavy market concentration and large economies of scale (huge capital outlays and other resources) required to do so. Rather, investing in and pursuing market development in niche markets, as well as engaging in strategic collaborations in those targeted markets are more likely options for developing countries to establish a competitive edge. Tight corporate control of cultural production and dissemination by mainly US media corporations has led to the domination of US culture in most foreign markets, to the extent that US culture is perceived as “superior”. Establishing consistent domestic demand is unlikely without aggressive domestic marketing and public relations campaigns for local cultural commodities, while pursuing external niche markets.

Global market demand for cultural commodities continues to rise steadily, particularly within the entertainment and media industry. In 2003, global expenditure on entertainment and media surpassed US\$1.1 trillion, driven primarily by new digitalized products and services, which have significantly strengthened market opportunities for television distribution, internet provision services, and digital music and movies (Price Waterhouse Coopers: 2003). The New York Times (2004) reports that in many developed countries, more than 10% of media consumption, in terms of time, is online. Overall, the US accounts for 44% of global spending on entertainment and media, and is likely to remain the largest market given current trends.

A closer look at individual entertainment industries shows similar trends and further highlights the appropriateness for small emerging players to pursue niche market development. Table 4 gives some indicators on market size and industry earnings for the entertainment industries with which this report is concerned – art, Caribbean-style carnivals, music, and the performing arts. Advertising is also included because it underpins the commodification process that creates global appeal, consumer loyalty and brand acceptance for cultural commodities.

**TABLE 3: MARKET SIZE & INDUSTRY EARNINGS: SELECT INDUSTRIES**

Industry	Market Size & Industry Earnings
Advertising	<ul style="list-style-type: none"> <li>▪ Global market worth US\$45 billion (2001); US has major share (approx. US\$20 billion growing at annual rate of 7%)</li> <li>▪ Main centres: New York, Tokyo, and London; followed by Frankfurt, Paris and Hong Kong</li> <li>▪ Industry dominated by 5 firms that control 73% of global marketing revenues: Omnicom (US\$9.75 billion), WPP (US\$8.24 billion), Interpublic (US\$5.86 billion), Publicis Groupe (US\$4.85 billion); and Dentsu (US\$2.75 billion; #1 in Japan, owns 15% of Publicis)</li> <li>▪ Top 5 firms control biggest names in advertising and marketing, including: J Walter Thompson, Ogilvy &amp; Mather, McCann-Erickson, Lowe, Saatchi &amp; Saatchi, The Kanter Group, Mindshare, Leo Burnett Worldwide</li> <li>▪ Global spending on advertising: US\$471.1 billion (2004), US is the biggest spender</li> <li>▪ Top firms earn most revenue from sponsorship and marketing strategies, and royalties based on sales</li> </ul>
Art	<ul style="list-style-type: none"> <li>▪ Global market deals only in original works that are unique or rare, worth US\$9 billion (2001)</li> <li>▪ Market dominated by New York (US\$4 billion) and London (£1.8 billion) – collectively represents 70% of all global sales; followed by Paris and Geneva</li> <li>▪ Auction sales account for largest share of global art sales, increasing by 37% over the period 2003-2004 to US\$3.5 billion</li> <li>▪ Main art markets (2004): US (46.3%); UK (26.9%); France (7.2%), Italy (3.7%); Germany (2.9%); Hong Kong (1.9%).</li> <li>▪ Global market demand highest for: painting (48%); drawing-watercolour (24.6%) and print (16.8%)</li> <li>▪ Contemporary art sales climbing steadily – revenue doubled from 2003 to 2004; highest price paid (2004): US\$4.9 million for sculpture by Jeff Koons “Jim Beam J.B. Turner Train”</li> <li>▪ Largest auction houses: Sotheby’s and Christie’s collectively sold no less than 378 pieces all over a million dollars in 2004 as compared to 229 in 2003.</li> <li>▪ Online auctions successful with artwork priced under US\$50,000; biggest on-line seller is print artwork</li> <li>▪ Overlapping commercial market is museums and galleries; British Government provided direct grants of £216 million to public museums and art galleries (2000)</li> </ul>

*(Table continued overleaf)*



**TABLE 3 (CONT'D)**  
**MARKET SIZE & INDUSTRY EARNINGS: SELECT INDUSTRIES**

Industry	Market Size & Industry Earnings
Caribbean-style Carnivals	<ul style="list-style-type: none"> <li>▪ Although not regarded part of mainstream cultural industries, there are over 100 diasporic Caribbean carnivals throughout the world (see Table), many of which generate significant economic spin-offs for host countries</li> <li>▪ Major Caribbean Carnivals (2002 attendance): Notting Hill Carnival, London (1.6 million); Labour Day, New York (3.5 million); Caribana, Toronto (1.1 million in 2004)</li> <li>▪ Overall income impact of carnivals (2002): Notting Hill £93 million; Caribana CDN\$200 million</li> <li>▪ Direct income effect of visitors' spending in Notting Hill Carnival (2002): £45 million</li> <li>▪ Public sector support evident: e.g. £6-10 million invested in Notting Hill Carnival</li> </ul>
Music	<ul style="list-style-type: none"> <li>▪ Global music market worth US\$40 billion, world sales fell by 7.6 % in 2003 – the 4<sup>th</sup> consecutive year of sales decline</li> <li>▪ World's major music markets (based on 2004 IFPI data): US (37%); Japan (18%); UK (10%); France (6%); Germany (3%); Canada (1.8%)</li> <li>▪ Latin American music industry has shrunk - sales in region down by 14.4% in value; Mexico has dropped out of "Top Ten"</li> <li>▪ Physical and online piracy major cause for overall decline - recorded music piracy amounts to 40% of all music products sold worldwide, totaling US\$4.5 billion (2003)</li> <li>▪ Global market shares for music: Universal (23.5%); EMI (13.4%); Sony (13.2%); Warner (12.7%); BMG (11.9%); independents (25.3%) which are increasingly merging with the "Big Five"</li> <li>▪ Global market demand highest for digital music – approx. 1.8 million people bought digital music in 2004, generating sales of US\$330 million; a tenfold increase from 2003 to 2004</li> <li>▪ By 2010, 25% of record company revenue will come from digital sales</li> </ul>
Performing Arts	<ul style="list-style-type: none"> <li>▪ Global industry comprises theatre, opera, dance, ballet – worth US\$40 billion in box office revenues</li> <li>▪ Largest markets: US (US\$7 billion); France and UK (£1 billion)</li> <li>▪ Worldwide theatre bestseller "Phantom of the Opera" raked in US\$1.87 billion) close to film big box office sellers</li> <li>▪ Private and public sector support strong - in the US funding comes from: private sponsors (US\$5 billion) and public funds (US\$1 billion); in the UK: public funds (£290 million); sponsors (£30 million); donations (£30 million)</li> </ul>

**Sources:** Dana Altman (2004) "Art and the Internet"; artprice (2005) "Art Market Trends 2004", [web.artprice.com](http://web.artprice.com); John Howkins (2001) *The Creative Economy*, "The Core Creative Industries"; Vishal Khanduja (September 2004) "Omnicom Group Inc."; London Development Agency (2002) "The Economic Impact of the Notting Hill Carnival"; [www.the-dma.com](http://www.the-dma.com); [www.forbes.com/home](http://www.forbes.com/home)

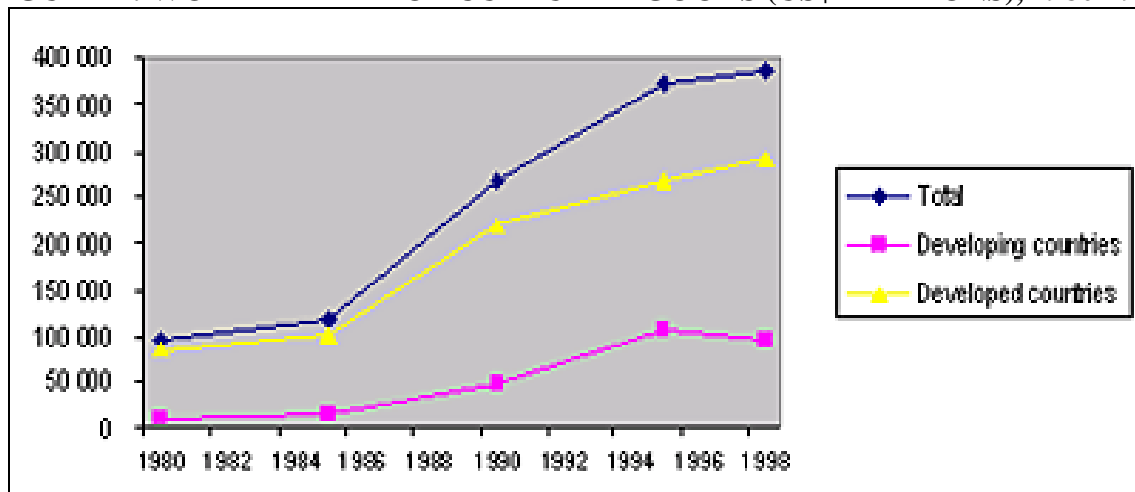
## 1.3 Economic Impact of Cultural Industries

### 1.3.1 Cultural Industries and International Trade

Accurate economic assessment of the cultural industries remains a challenge as differences in classification and variances in methodological approaches make it difficult to track the collective contribution of cultural industries to the global economy. Nevertheless, it has been estimated based on past performance that cultural industries are collectively worth US\$2.2 trillion, growing at an annual rate of 5% (Howkins 2001). Based on this projection, it is likely that by the year 2020, cultural industries would be worth as much as US\$6.1 trillion, depending on the rates of increase in supply and demand (Howkins 2001).

The most recent available data on cultural trade flows presented in the UNESCO Report (2000) “Study on International Flows of Cultural Goods Between 1990-98”, indicates that the volume of cultural products traded has increased substantially since 1991, particularly with the growth of the “new media” cultural industries in the mid-1990s. The Report also indicates that annual world trade in cultural industries stood at a mere US\$95.3 million in 1980 and increased dramatically to US\$387.9 million in 1998 (see Figure 2).

**FIGURE 2: WORLD TRADE OF CULTURAL GOODS (US\$ MILLIONS), 1980-1998**



**Source.** ‘Study on International Flows of Cultural Goods Between. 1980-98’. UNESCO, 2000. UNESCO Framework for Cultural Statistics includes the following categories: (Printed matter and literature (books, newspapers and periodicals, other printed matters), music (phonographic equipment, records and tapes, music instruments), visual arts (paintings, drawings and pastels, engravings, prints and lithographs, sculpture and statuary) cinema and photography (photographic and cinematographic cameras and supplies), radio and television (television and radio receivers), games and sporting goods.

Developed countries are the largest traders in cultural goods. At last count in 1998, Japan, USA, China, Germany and the UK were the top five exporters, accounting for 53% of global cultural exports (UNESCO 2000), while imports were highly concentrated among US, Germany, China, UK and France, representing 57% of total imports (UNESCO 2000). Towards the end of the 1990s, the concentration of exports and imports among the few developed countries did not shift substantially, although notable growth has been occurring in the cultural industries of countries such as Canada and Australia.

### 1.3.2 Cultural Industries' Value-added to National Economies

Cultural products are among the largest contributors to the economies of countries such as the US, UK, Canada, and Australia, with their annual growth rate surpassing that of traditional industries such as agriculture, aerospace and defense, and utilities as well as the whole economy. For example, during the period 1977-1997 US copyright industries<sup>6</sup> grew at an annual rate of 6.3% as compared to the country's overall growth rate of 2.7% per annum. During that period, copyright industries contributed more to the US economy than chemicals, aircrafts and aircraft parts, electronic equipment, automobiles and automobile parts, industrial machinery and clothes (Howkins, 2001: 86). In the UK, creative industries<sup>7</sup> grew at approximately 6% per annum during the period 1997-2001, surpassing the annual growth rate (3%) of the entire economy over this period (DCMS 2004: 2). Similarly in Canada copyright industries grew at an average annual rate of 6.46% over the period 1991-2002, comparing favourably to the economy's average annual rate of 3.27% ([www.canadianheritage.gc.ca](http://www.canadianheritage.gc.ca)). And in Australia, copyright industries recorded a growth rate of approximately 5.7% from 1995-1996 to 1999-2000, exceeding the average annual growth rate of the economy (4.85%) as well as that of key sectors: agriculture, forestry and fishing (5.1%), wholesale trade (5.6%) and personal and other services (4.4%) during this period (Australian Copyright Council 2001: 7).

A review of cultural industries' value-added to GDP shows a similar favourable output. The IIPA's recent economic impact study on US copyright industries indicates that US copyright industries' value-added to US GDP steadily grew over the period 1997-2002 (see Table 5). Statistics show that total copyright industries contributed US\$1,254 million (12%) to US GDP in 2002, surpassing expenditures and investments of all states and local governments in the US (US\$1,189.1 million).

**TABLE 4: US COPYRIGHT INDUSTRIES VALUE-ADDED TO GDP, 1997-2001  
(US\$ BILLIONS)**

	1997	2001	2002
Total Copyright Industries	1,064.0	1,206.0	1,254.0
% Share of US GDP	2.07%	7.75%	12%

**Source:** IIPA (2004) "Copyright Industries in the US Economy The 2004 Report"

The case is much the same for the UK, Canada and Australia. As illustrated in Table 6, UK creative industries accounted for approximately £51,300 million in value-added to GDP in 2000, increasing to £53,400 million in 2002 (DCMS, 2004). Canada's core, non-core and partial copyright-based industries<sup>8</sup> exports reached CAN\$53, 408 million in 2002, nearly doubling the 1996 export total of CAN\$26,987 billion ([www.canadianheritage.gc.ca](http://www.canadianheritage.gc.ca)). During that period, copyright-based industries steadily increased their contribution to GDP, moving from 3.87% in 1991 to 5.38% in 2002 ([www.canadianheritage.gc.ca](http://www.canadianheritage.gc.ca)). In Australia, copyright industries' value-

<sup>6</sup> IIPA defines cultural industries as copyright based industries. For further details, also refer to IIPA's report (2004) "Copyright Industries in the US Economy The 2004 Report".

<sup>7</sup> The UK Classification for cultural industries, encompassing: advertising; architecture; video, film, and photography; music and the visual and performing arts; publishing; software, computer games, and electronic publishing; radio and TV; art and antique; designer fashion; crafts; and design.

<sup>8</sup> This classification of cultural industries follows the WIPO classification on copyright industries .

added to GDP increased from AUS\$15.6 billion in 1996-1997 to AUS\$19.2 billion (Australian Copyright Council 2001: 4). A breakdown of copyright industries' GDP share indicates that newspaper, printing and publishing (AUS\$2,981 million); printing (AUS\$1,975 million) and Free to Air TV services<sup>9</sup> (AUS\$1,392 million) accounted for the largest portion (Australian Copyright Council 2001: 6). Table 7 illustrates copyright industries' percentage share of GDP over the period 1980-2000.

**TABLE 5: UK CREATIVE INDUSTRIES VALUE-ADDED TO GDP, 2000-2002  
(£ MILLIONS)**

	2000	2001	2002
Total Creative Industries	51,300	53,300	53,400
% Share of UK GDP	8.3%	8.3%	8.0%

**Source:** DCMS (2004) "Creative Industries Economic Estimates Statistical Bulletin".

**TABLE 6: AUSTRALIA'S COPYRIGHT INDUSTRIES' CONTRIBUTION TO GDP**

	1980-81	1985-86	1992-93	1995-96	1999-00
% Share of Australian GDP	2.2%	2.6%	2.8%	3.0%	3.3%

**Source:** Australian Copyright Council (2001) "The Economic Contribution of Australia's Copyright Industries", p. 7.

### 1.3.3 Impact on National Employment

Cultural industries are also an important driver of employment. US data indicates that copyright industries represent a significant source of employment, generally accounting for approximately 8% of US workforce annually. In 1997, employment in these industries rose from 11.3 million to 12.2 million in 2001, at an annual growth rate of 1.97% as compared to overall employment growth rate of 1.39% (IIPA 2004: 8). In the UK, creative employment comprised some 1,878,800 persons, having increased from 1,568,700 persons in 1997. Sectors where employment has risen steadily over the period are: software, computer games and electronic publishing (7%); design including fashion (6%); and film, video and photography (4%) (DCMS, 2004). Employment in Canadian copyright industries grew from roughly 500,000 in 1991 to almost 900,000 by 2002 ([www.canadianheritage.gc.ca](http://www.canadianheritage.gc.ca)). In Australia, a 2000 census indicates that the copyright industries workforce increased from around 312,000 in 1996 to 345,000 in 2000 (Australian Copyright Council, 2001). Employment growth was attributed to the expansion of key sectors: pay television (50%); information storage and retrieval services (17%); and, film and video (13.7%).

Some developing countries have also gained positively from the development of cultural industries. On the Asian continent for example, employment is generated in indigenous cultural industries such as textiles, crafts and cultural heritage (Matarasso 2001), thereby allowing developing countries to build stable cultural industries on local culture and talents apart from foreign-oriented cultural industries<sup>10</sup>. Some notable examples are as follows:

<sup>9</sup> This includes commercial, public and community television services.

<sup>10</sup> For example, in Korea foreign conglomerates make up over 70% of the entire film and video market. Korea spends over \$13 million on foreign royalties and copyright. (See Park Heung-soo (2001) "Cultural Industries: Current Status and Outlook" at [www.culturelink.or.kr/doc](http://www.culturelink.or.kr/doc)).

- Traditional Pakistani fabric design have successfully attained global market outlets, that are diverse in art and craft products as well as cultural heritage and based on the creative capacities of Pakistanis;
- Bangalore, India has developed into a global centre of the software industry based on local educational traditions and talents of its people;
- The Thai clothing industry has recently begun to brand itself based on its rich cultural traditions, with new young designers launching fashion lines and haute couture labels on the international markets, using traditional fabrics and ideas to inform their work;
- The World Bank project The Virtual Souk uses the Internet to bring the products of craft makers from Tunisia, Lebanon and Morocco to international markets ([www.peoplelink.org/vsouk](http://www.peoplelink.org/vsouk));
- In Lucknow India, the Self-Employed Women’s Associations has assisted in marketing the work of craftswomen in traditional fabrics, which has stimulated employment in the sector. There are some 5,000 women employed in the sector.

Among the more developed Asian economies such as Singapore, cultural industries represent a notable portion of total workforce. Singapore exports approximately S\$3.6 billion worth of creative products and thus contributes directly and indirectly to the economy (see Figure 3). In 2000, some 47,000 persons were employed in Singapore’s creative industries, representing 2.2% of nation-wide employment, and an additional 32,000 work in distribution industries<sup>11</sup>. Collectively, the creative cluster represents approximately 3.8% of total employment. The sector with the highest employment is the IT sector, which accounted for approximately 31% of the entire creative cluster (Singapore Ministry of Trade and Industry 2003).

**FIGURE 3: KEY STATS SINGAPORE’S CREATIVE INDUSTRIES, 2000**

- Creative industries value-added to GDP – S\$4,999 million (1.9%)
- IT and software sector highest contributor to value-added, its share totaling S\$1,137 million
- Labour productivity of creative cluster stood at S\$63,500 per worker, close to average services labour productivity S\$68,850 per worker
- Between 1986-2000 creative industries grew by an average of 17.2%; average annual GDP growth 10.5%

*Singapore Economic Survey, 1<sup>st</sup> Quarter, 2003*

### 1.3.4 Some Indicators for Latin America and the Caribbean

Table 8 provides a summary of the contribution of cultural industries to six Latin American countries across various periods. The Table is not intended for comparative analysis, but rather to give a rough indication of the economic impact of cultural industries in that region.

<sup>11</sup> Defined as downstream industries within Singapore’s creative cluster. These are: web hosting services, computer and software retailing, cyber cafes, Internet access providers, satellite uplink and downlink services, record music wholesaling and retailing, printing of newspaper, periodicals, books and magazines, information storage and retrieval services, books and magazine wholesale and retail, libraries, museums and art galleries, motion picture distribution, photographic equipment wholesale and retail, photographic film processing.

**TABLE 7: CULTURAL INDUSTRIES CONTRIBUTION TO SELECT LATIN AMERICA ECONOMIES**

COUNTRY	BASE YEAR	CULTURAL INDUSTRIES IMPACT	
		GDP	EMPLOYMENT
Argentina	1993	4.1%	-
	1994	-	3.5%
Brazil	1998	6.7%	5.0%
Columbia	2001	2.01%	-
	1999-2002	-	27,724*
Chile	1990-1998	2.0%	2.7%
Uruguay	1997	6.0%	4.9%
Venezuela	1997-2000	3.0%	35,329**
	2001	2.3%	-

**Source:** OAS (2004) “Culture as an Engine for Economic Growth, Employment and Development”.

\*Jobs in three sectors: publishing, phonography and filmmaking.

\*\*Jobs in four sectors: graphic arts, radio, advertising and filmmaking.

On the other hand, economic contribution of Caribbean cultural industries is not captured in existing regional and national statistics. To date, one major study has been conducted on the economic contribution of the Caribbean music industry, based on research in all CARICOM states with the exception of Haiti, The Bahamas and Surinam (Nurse 2000). The study concluded that:

- Jamaica music industry employs approximately 15,000 people and controls about 15-20% of the US\$300 million in reggae music sales (Caribbean Export Development Agency 2001: 2);
- Dominican Republic produces the dominant share of meringue, which accounts for 8% of the Latin music market, valued at US\$626 million in 1999;
- Barbados music industry is estimated to have earned approximately US\$15 million in 1999, derived largely from overseas performances by soca artists and music bands, performance fees in the hospitality sector and earnings from festival tourism;
- The music industry in the OECS is largely based on festival tourism, accounting for over US\$20 million in 2000; and,
- Trinidad and Tobago’s music industry accounts for approximately 50% of foreign exchange earnings from the entertainment sector, which contributed approximately US\$50 million in 1998 to total foreign exchange earnings.

#### **1.4 International Institutional and Regulatory Environment**

Growing importance of cultural industries in global trade has triggered the expanding role of institutional and regulatory support mechanisms for the cultural industries worldwide. Overall, regulation in the cultural industries is achieved through:

- International treaties and trade rules (see Table 9);
- National laws and policies that reinforce international treaties and trade rules to ensure that benefits accrue to national cultural industries in the global market arena, encourage local artistic and creative endeavour, and stimulate competitiveness (see Table 9);
- Regulations and industry practices established by non-governmental institutions such as industry trade associations; guilds and unions; and,
- Copyright collection societies, which essentially monitor use of copyright works on behalf of right-owners.

**TABLE 8: EXAMPLES OF REGULATORY & POLICY FRAMEWORKS GOVERNING CULTURAL INDUSTRIES**

	<b>Types of Public Policy &amp; Regulation</b>	<b>International/Inter-Governmental Treaties</b>
Creation	<p>Freedom of expression and movement</p> <p>Policies of direct support for artists – grants, awards, subsidies</p> <p>Policies stimulating private sector and market support (sponsorship policies, tax incentives)</p> <p>Education policies (artistic training; award of scholarships for training)</p> <p>Social and labour policies (new self-employed status for artists, social insurance laws, pension schemes)</p> <p>Tax policies</p>	<p>UN Declaration of Human Rights (1948)</p> <p>UNESCO – Recommendation concerning the Status of the Artist, International Charter on Artistic Education</p> <p>ILO Declaration on Fundamental Principles and Rights at Work (1998)</p> <p>Regional Agreements such as EU Council Resolution on the promotion of the free movement of persons working in the cultural sector (1999)</p>
Production	<p>Media content policies (e.g. quotas, decency laws, advertising regulations)</p> <p>Language policies (including translation)</p> <p>Supply side policies supporting the production of national programming</p> <p>Economic policies such VAT, tax shelters for independent producers and companies (e.g. film, television, music); ‘media taxes’ or ‘consumer licensing fees’ levied on radio and television use, funds directed back to broadcasters; other levies stating that a percentage of ticket sales are to be re-invested in national production.</p> <p>Regional development policies (cultural industries)</p>	<p>WTO: GATT</p> <p>OECD: Code of Liberalization of Current Invisible Operations</p> <p>Regional Agreements including articles of NAFTA on exemptions related to measures concerning cultural industries or EU regulations on fixed book pricing (1999)</p> <p>ISO quality standards on manufacturing and production</p>

*(Table continued overleaf)*



**TABLE 8 (CONT'D.)**  
**EXMPLES OF REGULATORY & POLICY FRAMEWORKS GOVERNING CULTURAL INDUSTRIES**

	<b>Types of Public Policy &amp; Regulation</b>	<b>International/Inter-Governmental Treaties</b>
Distribution	<p>Film, music or book distribution policies</p> <p>Television and film co-production policies</p> <p>State guarantees for art exhibitions, dance and theatrical productions</p> <p>Economies policies (copyright etc. taxes, levied on import of cultural goods, interest free loans for film and music distributors)</p> <p>Language policies (dubbing restrictions, subtitling, and multilingual or ‘minority language’ productions)</p> <p>Information society policies (including on-line distribution of digitized images, support to e-publishing); regulation of Internet service providers</p>	<p>UNESCO Florence Accord, (1950, 1976) on tax exemptions for the importation of cultural products</p> <p>WIPO conventions on copyright, neighbouring rights: Berne Convention for the Protection of Literary and Artistic Works; Rome Convention; WIPO Copyright Treaty; WIPO Performances and Phonogram Treaty</p> <p>WTO: TRIPS</p> <p>ITU telecom regulations and harmonization standards</p> <p>Regional Agreements including: MERCOSUR Protocol of Cultural Integration (1996); EU Television without Frontiers Directive; Council Resolution on the promotion of the translation of contemporary European dramatic works (1993) and of important works of European culture (1987)</p>
Consumption	<p>Strategies supporting voucher programmes, consumer tax credits</p> <p>Arts and cultural education policies</p> <p>Sector specific promotion policies</p> <p>VAT on books and sound recordings</p> <p>Language policies (e.g. Translation of majority and minority languages)</p>	<p>UNESCO participation by the People at Large in Cultural Life and their Contribution to it (1976)</p> <p>UN convention on Economic Social and cultural Rights (1966), including right to participate in cultural life</p> <p>Regional Agreements including: African Charter of Human and Peoples’ Rights (1986); the American Declaration on the rights and Duties of Man (1948)</p>

**Source:** Danielle Cliche (2001) “Culture, Governance and Regulation”, in “Recognizing Culture”. A Comedia, UNESCO, World Bank Publication.

### 1.4.1 Cultural Industries and International Trade Rules

Given the dynamic nature of culture as a social good and a tradable commodity, culture has always been at the centre of controversy in international trade and multilateral trade negotiations<sup>12</sup>. But it was the trade dispute between Canada and the US over split-run magazines known as the *Periodicals case* that sparked international discussion on culture and trade<sup>13</sup>. Central to the debate is the importance of cultural diversity within international trade. Advocates for cultural diversity, led by Canada and France, initially sought exemptions for cultural goods and services from international trade rules, but more recently have lobbied for an International Instrument on Cultural Diversity that would give governments a mechanism by which to safeguard their domestic cultural policies from trade disciplines. They contend that treating cultural goods and services like ordinary goods and services ignores the special characteristics of cultural goods and services, particularly their contribution to national cultural identity and social cohesion. Supporters of trade agreements argue contrarily that like all international traded goods and services, cultural commodities are produced through the application of capital, technology, and labour, and like other sectors depend upon commercial success for prosperity.

In 1999, UNESCO took a decisive interest in the debate on preserving cultural diversity<sup>14</sup>, having until then remained relatively silent on the issue. UNESCO has now taken a lead role in crafting a new international instrument on Cultural Diversity. The overall intention is to “define a set of general culture policy principles” that would “ensure the necessary autonomy in national policy” that would guarantee “balanced international cooperation”<sup>15</sup>. But, there are some conflicting views on the extent to which such an agreement would complement WTO and whether it would enhance current negotiating stances.

Nevertheless, the issue of cultural diversity holds particular relevance for the Caribbean, since the region, like other developing countries face the daunting challenge of preserving their culture and heritage amidst strong external cultural forces. The Caribbean is particularly vulnerable to the world’s most dominant cultural influence, as a result of geographical proximity and aided technology. Thus, domestic demand for Caribbean cultural goods and services remains relatively weak.

To date, there are no special provisions at the international policy level governing the cultural industries as a sector. At the WTO, trade in cultural goods and services is subject to the same trade rules governing other goods and services. The most relevant rules for cultural goods are found under the GATT. These are (see Table 10):

---

<sup>12</sup> As early as the 1920s, European countries relied on screen quotas to protect their film industries from an influx of US films. In 1947, the GATT permitted the use of screen quotas for films in light of this. In the Tokyo Round of GATT (1970s), subsidies for film and television programmes were again an issue.

<sup>13</sup> Canada – Certain Measures Concerning Periodicals, (WT/DS31R and WT/DS31/AB/R).

<sup>14</sup> In 1999, UNESCO hosted an expert symposium on the theme “culture, the market and globalization”, and released a document entitled “Culture, Trade and Globalization: Questions and Answers”, in which cultural diversity was addressed. It was determined at the symposium that UNESCO should play a more active role in the decision-making process on cultural diversity.

<sup>15</sup> UNESCO (2003) “Preliminary Study on the Technical and Legal Aspects Relating to the Desirability of a Standard-Setting Instrument on Cultural Diversity”, Report of the Executive Board, March 12<sup>th</sup>.

- Most-favoured nation and national treatment;
- Tariffs;
- Quotas; and
- Subsidies.

Rules relevant to services are found under the GATS, and are defined according to means of delivery (see Table 11):

- Cross border;
- Consumption abroad;
- Commercial presence; and
- Movement of natural persons.

**TABLE 9: WTO GATT RULES GOVERNING CULTURAL GOODS**

Trade Rules	Explanations
Most-favoured-nation treatment (MFN) rule (Article I)	Prohibits discriminatory application of import tariffs or other measures affecting trade in goods between WTO members, unless country is member of regional trade agreement
National treatment rule (Article III)	Prohibits discriminatory application of internal trade measures between domestic and imported goods Two exceptions: screen-time quotas for films; payment of subsidies and government procurement
Tariff rule (Article II)	Prohibits tariffs on imported goods by a WTO member at a higher rate than that listed in that member's schedule of goods on which the member has undertaken obligations  Tariffs can be applied to sensitive goods at any level as agreed to with key trading partners
Quota rule (Article XI)	Prohibits import or export restrictions on any product except under specifically defined conditions
Subsidies rule (Article XVI)	Prohibits subsidies that are based upon export of the product or upon use of domestic over imported goods

**Source:** [www.wto.org](http://www.wto.org)

**TABLE 10: WTO GATS RULES GOVERNING CULTURAL SERVICES**

<b>Modes of Supply<sup>16</sup></b>	<b>Explanations</b>
Cross Border	Supply of services by producers in the territory of one member to producers in the territory of another member
Consumption Abroad	Consumers or firms from the territory of a member using services in the territory of another member
Commercial presence	Supply of services by producers in the territory one member country through commercial presence in the territory of another member country
Movement of natural persons	Supply of services through the presence of natural persons of a member in the territory of any other member

**Source:** ITC/UNCTAD/WTO/Commonwealth Secretariat (2002) Business Guide to the General Agreement on Trade in Services.

Although technology has become an integral part of cultural trade, trade rules are yet to be developed to address this convergence. Indeed, the increasing inter-linkages between the audio-visual and telecommunications sectors, make it impossible to consider the supply of cultural services without due consideration of technology. This situation is reflective of the general difficulty in defining cultural industries within the new digital context, as the distinctions between cultural goods and services become increasingly blurred.

Other international trade agreements that pertain to the cultural industries are:

- **WTO TRIPS:** seeks to strengthen intellectual property regimes at international and national levels by protecting the rights of creators (performers, producers, broadcasters) of all works, including computer programmes, compilations of data, cinematographic works, and sound recordings<sup>17</sup>. TRIPS allows countries to bring action against another Member if found to be in violation of the TRIPS Agreement.
- **FTAA:** the goal of which is to establish a “Free Trade Agreement of the Americas” within which a number of areas not under the WTO such as a common investment regime, government procurement, and competition policy are to be included. To date, no serious negotiations have occurred on culture, although Canada has issued proposals for cultural diversity to be exempted under FTAA and has proposed language for the Preamble of the Agreement to that effect.
- **ACP-EU Agreement:** seeks to promote and expedite economic, cultural and social development of ACP states towards assuring peace and security and the promotion of a stable and democratic environment (Demas and Henry 2001). The Agreement acknowledges the pivotal role of trade in services in global trade and in economic

---

<sup>16</sup> GATS outlines a framework of principles that apply to all Members on any measures affecting trade in services: transparency; most-favoured-nation; non-discrimination; market access and national treatment (full discussion of the principles can be found at [www.wto.org](http://www.wto.org)).

<sup>17</sup> Further details can be accessed on the WTO website, [www.wto.org](http://www.wto.org).

development including culture and its enhancement and preservation. However, the Agreement does not address market opportunities for cultural commodities.

- UNESCO Florence Agreement and Nairobi Protocol: were developed in accordance with one of the major principles of UNESCO to facilitate cultural exchange and the free flow of ideas. Modelled on the GATT Agreement during its existence, the Florence Agreement and Nairobi Protocol seek to facilitate easier importation of education, scientific and cultural materials, through tariff reductions and the removal of currency and trade barriers.

#### **1.4.2 National Regulatory and Institutional Support**

Throughout the world there are various models of providing support for the creative industries. International artistic promotion and exchange is provided for by variants of four models:

##### Single-source models

1. The quasi-autonomous cultural institute (e.g. Britain, Germany, France and Spain) (needs significant resources);
2. Direct funding and control by a Government department (organizations apply for funding) (e.g. the Netherlands);

##### Multi-source models

3. Independent activities by a variety of agencies (distribution of resources spread across a number of Government departments and agencies) (e.g. Quebec) (resources must be supplied for the various agencies to prevent territorial disputes when there are budget cutbacks);
4. Single co-ordinating body which directs activities by a variety of agencies (Australia, Canada and Singapore) Council providing funding based on the needs of artists and arts organizations (Australian International Cultural Council)

With regard to examining the structure in various countries around the world, the countries were chosen based on the following factors:

- Time constraints limited the number of countries examined;
- Availability of information;
- Success of the entertainment and film industries in the respective countries; and
- Similarity to the size, culture and resources available in Trinidad and Tobago.

#### **Canada**

Population 32,805,041 (July 2005 Estimate)

GDP of US\$1.023 trillion (2004)

GDP Real Growth Rate 2.4% (2004)

GDP per capita US\$31,500 (2004)

Unemployment Rate 7% (2004)

Canada's approach to institutional capacity building for its cultural industries is a useful benchmark and can be illustrated as a best practice. Because of its immediate geographic proximity, Canada has experienced US cultural dominance perhaps more than any other country in the world. Nevertheless, Canadian artists have penetrated even the United States Market successfully with its 21 leading artists selling more than 556 million records around the world worth more than US\$8.35 billion at retail. (Celine Dion, Shania Twain, Alanis Morissette, Avril Lavigne, Diana Krall and Nelly Furtado)<sup>18</sup>. Estimates for 2001 show 130,700 artists (musicians, singers, dancers, actors, visual artists and other performers) and an additional 516,000 cultural workers.

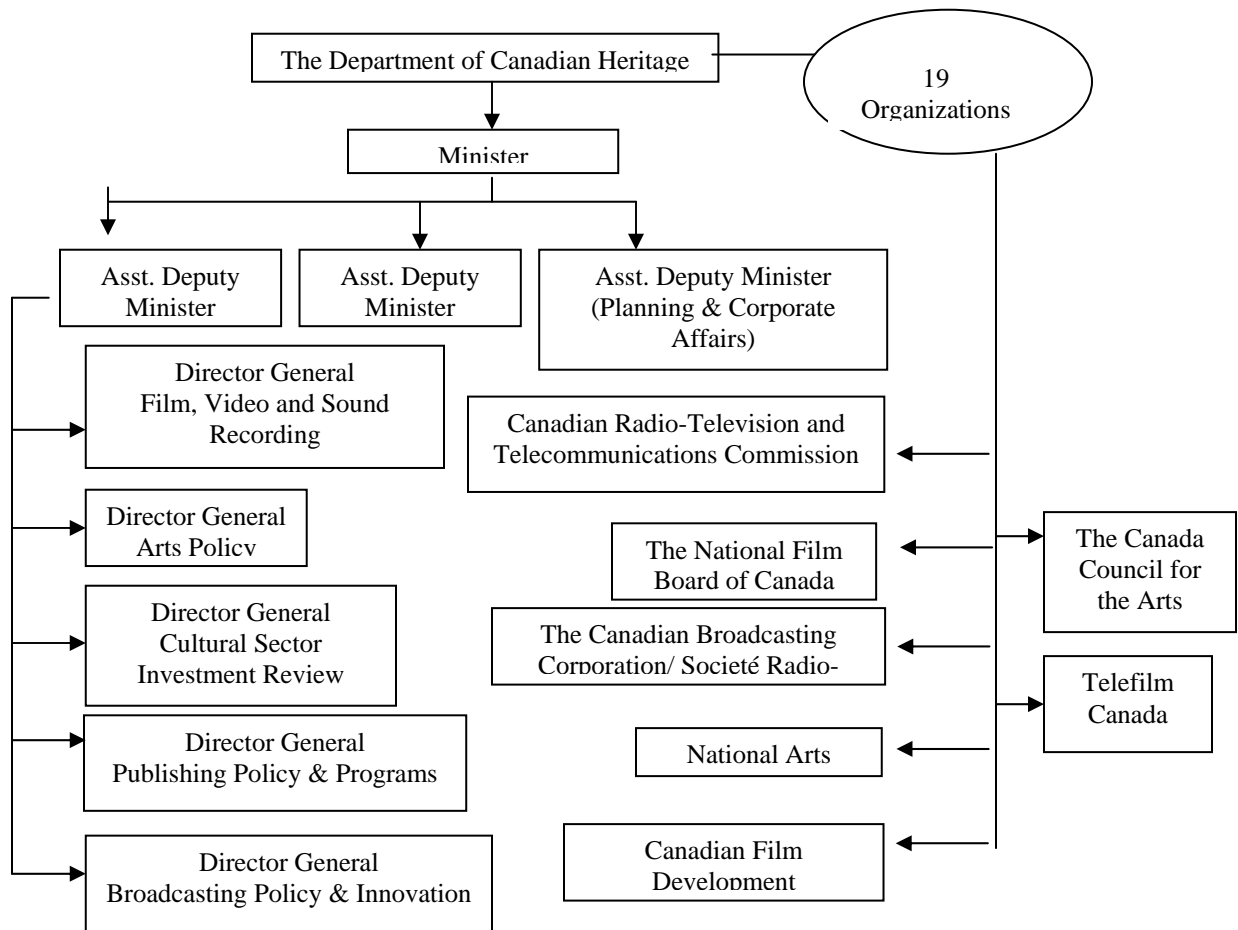
The Canadian government, through a number of cultural institutions, utilizes a range of tax measures, financial incentive schemes, programme support mechanisms, content requirements, intellectual property tools and legislation to build up its cultural industries<sup>19</sup> (Media Awareness Network [www.media-awareness.ca](http://www.media-awareness.ca)). The industry began to thrive a little over 30 years ago with the creation of Canadian content regulations in 1971. The federal objective in cultural policy is the creation and preservation of Canadian content. (CANCON). However the creation of Canadian institutions began in the late 19<sup>th</sup> century and early 20<sup>th</sup> century. The country is also very active internationally by virtue of international bilateral and multilateral agreements in the field of culture (e.g. some 35 co-production agreements have been signed). Total public cultural expenditure for the fiscal year 2001 – 02 was US\$ billion.<sup>20</sup> US\$107 million was provided in grants, prizes and payments to 2,089 Canadian artists and 2,091 arts organizations in 2003 – 04.

---

<sup>18</sup> Applaud "Canadian Music on the World Stage" Vol 1 #2 February 2003.

<sup>19</sup> Discussion on Canada's regulatory environment is taken from: "Canadian Content in the 21<sup>st</sup> Century" [www.pch.gc.ca/progs/ac-ca/progs/cc21c/cc21c\\_e.cfm](http://www.pch.gc.ca/progs/ac-ca/progs/cc21c/cc21c_e.cfm); Department of Canadian Heritage website, [www.pch.gc.ca](http://www.pch.gc.ca); Danielle Cliche and Terrence Cowl (2001) "Canada", [www.unesco.org/culturelink/culpol/canada.html](http://www.unesco.org/culturelink/culpol/canada.html); Media Awareness Network "Canadian Cultural Policies", [www.media-awareness.ca/english/issues/cultural\\_policies](http://www.media-awareness.ca/english/issues/cultural_policies);

<sup>20</sup> Council of Europe "Compendium of Cultural Policies and Trends in Europe." 6<sup>th</sup> Edition. 2005



**The Department of Canadian Heritage (DCH)** <http://www.pch.gc.ca>

The Department of Canadian Heritage (Ottawa) has 19 “subsidiary” organizations, all funded by Parliament, that are mandated to assist in the development of Canada’s cultural industries. The Cultural Affairs Sector has separate divisions responsible for broadcasting (television, radio, cable); film and video; sound recording; publishing; new media and the arts. It interacts with the Department of Foreign Affairs and International Trade which has its own Arts and Cultural Industries Promotion Division (<http://www.dfait-maeci.gc.ca/arts>).

**The National Film Board of Canada**

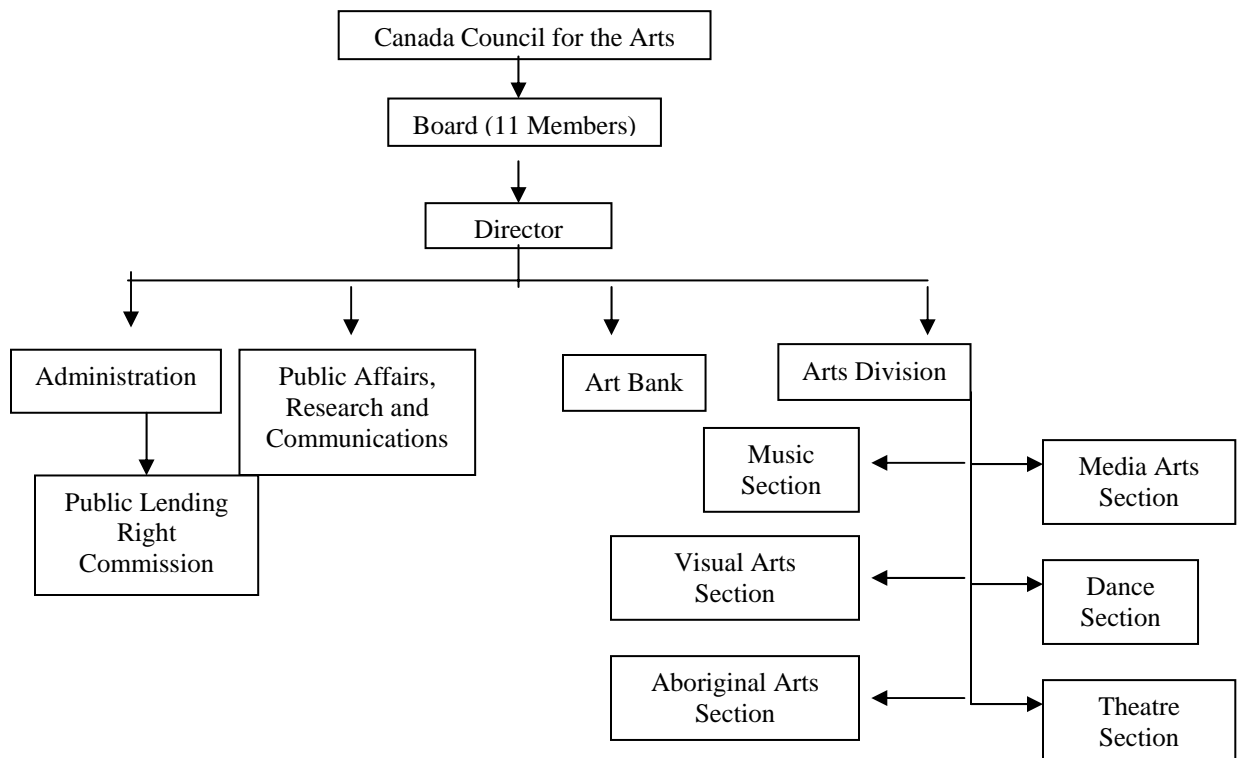
This Federal Government Agency was established in 1939 as the national public producer and distributor. It is mainly responsible for the production and distribution of documentaries and animation.

**The Canada Council for the Arts** <http://www.canadacouncil.ca>

The Canada Council for the Arts is an independent agency created by the Parliament of Canada in 1957 to foster and promote the arts. The Council reports to Parliament through the Minister of Canadian Heritage. According to the Canada Council Act, the role of the Council is "to foster and promote the study and enjoyment of, and the production of works in, the arts." To fulfill this

mandate, the Council offers a broad range of grants and services to professional Canadian artists and arts organizations in dance, interdisciplinary and performance art, media arts, music, theatre, visual arts, and writing and publishing. It also promotes public awareness of the arts through its communications, research and arts advocacy activities. The Council also maintains the Canadian Commission for UNESCO, which coordinates UNESCO activities in Canada; encourages Canadian participation in UNESCO activities; advises Foreign Affairs minister on all UNESCO matters; as well as assists the Canada Council with its international programmes.

The annual appropriation from Parliament for the Canada Council is supplemented by endowment income, donations and bequests. In 2003-04, the Council awarded 6,147 grants to artists and arts organizations and made payments to 14,435 authors through the Public Lending Right Commission. Grants, payments and awards totalled \$137 million<sup>21</sup>.



**Telefilm Canada** [www.telefilm.gc.ca](http://www.telefilm.gc.ca)

This is the national public investor in the creation and distribution of television, film and new media products. Telefilm Canada provides training programmes for writers, producers and directors, a Screen-Writers Assistance Programme as well as a programme for the sound recording sector, which assists with the development of business plans. The institution also administers co-production agreements. Its annual budget is approximately CND\$244 million.

**The Canadian Independent Film and Video Corporation**

This is a private sector organization, established through Telefilm Canada and the National Film Board, to give support and provide financial assistance to non-theatrical film, videos and new

<sup>21</sup> <http://www.canadacouncil.ca> Canada Council for the Arts, 2004.



media projects created by Canadian independent producers. Its budget is approximately CND\$13.1 million.

### **The Canadian Broadcasting Corporation/ Société Radio-Canada**

This organization is the national public broadcaster, which was established in 1936. The Corporation produces and distributes Canadian programming for both English and French language radio and television.

### **The Canadian Radio-Television and Telecommunications Commission (CRTC)**

The Canadian Radio-television and Telecommunications Commission (CRTC) was established in 1968 to regulate the broadcasting and cable sector in Canada and ensure that Canadian content regulations are upheld.

#### **1.4.2.2 Financial Incentive Schemes and Support Programmes**

- The Artists and Community Collaborative Fund: offers financial support to projects that link professional artists and communities. Grants vary according to the criteria of each participating programme, which include:
  - Grants to Dance Professionals
  - Production Project Grants in Dance
  - Dance Touring Grants
  - Multidisciplinary Festivals Project Grants
  - Music Project Grants
  - Grants to Media Arts Production Organizations
  - Theatre Production Project Grants
  - Support to Theatre Service Organizations
  - Project Assistance to Visual Arts and Fine Craft
- Arts Presentation Canada: provide grants to Canadian non-profit organizations, provincial/territorial and municipal institutions and first nation groups and tribes involved in the arts to assist with presenting and showcasing the arts.
- Canada Music Fund (CMF): seeks to strengthen the Canadian sound recording music industry “from creator to audience” (Department of Canadian Heritage, [www.pch.gc.ca](http://www.pch.gc.ca)). The Fund has eight components:
  - Creators’ Assistance Programme, administered by the SOCAN Foundation;
  - Canadian Musical Diversity Programme administered by the Canada Council for the Arts;
  - New Musical Works Programme administered by FACTOR and MUSICACTION;
  - Music Entrepreneur Programme administered by Telefilm Canada;
  - Support to Sector Associations Programme, administered by the Department of Canadian Heritage;

- Collective Initiatives Programme administered by FACTOR and MUSICACTION;
  - Canadian Music Memories Programme administered by Library and Archives Canada and the Audio-visual/Visual Presentation Trust;
  - Policy Monitoring Programme, which allows for overall monitoring of CMF by the Department of Canadian Heritage.
- Canada Arts and Heritage Sustainability Programme: provides funding to not-for-profit arts and heritage organizations to assist with strengthening their organizational effectiveness and build their capacity. It comprises four components: Stabilization Projects, Capacity Building, Endowment Incentives, and Networking Initiatives.
  - Cultural Capitals of Canada: provides awards of recognition with matching contributions towards specific activities to Canadian municipalities for past achievements with an ongoing commitment to arts and culture.
  - Cultural Spaces Canada: provides funding for the improvement, renovation, and construction of arts and heritage facilities, and the acquisition of specialized equipment as well as conducting feasibility studies to non-profit arts and heritage organizations.
  - Cultural Industries Development Fund: targets entrepreneurs working in book and magazine publishing, sound recording, film and video production and multimedia to provide support to cultural production through a range of financial services, especially term loans. The fund is administered by the Business Development Bank of Canada.
  - Cultural Initiatives Program (CIP): assists non-profit, incorporated, professional arts and heritage organizations in undertaking arts and heritage activities and projects. The programme focuses on improving management practices, establishing and improving cultural equipment and infrastructure, and increasing the availability of cultural products for Canadians.
  - National Arts Training Contribution Programme: supports independent Canadian organizations that train Canadians for professional artistic careers. Support is given on a multi-year or annual basis for the on-going operational activities of the organizations professional programmes.
  - Visiting Foreign Artists Programme: provides grants to Canadian professional arts organizations to encourage visits by individual foreign artists of outstanding achievement. Grants range from CND\$500-\$3,000.

### **1.4.2.3 Taxation Measures**

- Amendment to Income Tax Act (1991) allows private donors to not-for-profit arts organizations (performing arts companies, public galleries, museums) to claim a tax credit on their donations to a maximum of 20% of the taxpayer's income during a given year.
- Tax deductions given to artists for donations of works of art to the state or to designated institutions.
- Employed artists are allowed up to \$1,000 in employment-related tax deductions in recognition of the fact that they, unlike most wage earners, incur professional expenses that are covered by an employer.
- National arts service organizations are eligible for same tax advantages as charitable organizations.
- Status of Artist Act (1993) provides for some small tax adjustments for artists.

### **1.4.2.4 Canadian Content Regulations**

Canadian content regulations (Cancon) require television and radio stations to play a certain amount of domestic programming as follows:

- Radio AM and FM: 35% of all music aired must be Canadian; 35% of music broadcast between 6 a.m. and 6 p.m. Monday through Friday must consist Canadian.
- Television: a yearly content level of 60% overall and at least 50% between 6 p.m. and midnight.
- Pay-TV, Specialty and Pay Per View: varying requirements as per broadcast license

The regulations also refer to the provisions in the Broadcasting Act and Telecommunications Act that restrict foreign ownership in broadcasting and telecommunications enterprises to 20% as a condition of licensing.

### **1.4.2.5 Legislation**

- Canada Council Act (1957);
- National Arts Centre Act (1966);
- Telefilm Canada (1967);
- Cultural Property Export and Import Control (1977);
- Social Sciences and Humanities Research Council Act (1978);
- Broadcasting Act (1968,1991);
- Status of the Artist Act (1992);
- Copyright Act (1924, 1993);
- The Telecommunications Act (1993)

## **Australia**

Population 20,090,437 (2005)

GDP US\$611.7 billion (2004)<sup>22</sup>  
GDP Growth Rate 3.5% (2004)  
GDP Per Capita US\$30,700 (2004)  
Unemployment Rate 5.1% (2004)

**Australia Council for the Arts** <http://www.ozco.gov.au/>

The Australia Council is the Government's arts funding and advisory body established in 1975. The Council provides over 1,700 grants each year to artists and arts organizations in the fields of music, new media arts, theatre and visual arts/craft, dance, literature, Aboriginal arts and community cultural development. It supports strategies to develop new audiences and markets for the arts, as well as conducts arts research and policy development, and regularly advises Governments and industry on issues affecting Australian artists, such as taxation and insurance. The Council has a full time staff of 125 persons and operates with a budget of US\$108 million (9% dedicated to international activity). The Council has between 10 and 14 members, not including the CEO who is a member of the Council (ex officio). There are seven Divisions each headed by a Director. The Audience and Market Development Division is responsible for export and market development, cultural promotions and cultural relations. The Arts Development Division mainly provides grants for cultural exchange, international presentation and promotion and professional development for seven arts sections - Community Cultural Development, Dance, Literature, Theatre, Music, New Media Arts and Visual Arts/Craft. There are separate Boards for each of these sections. The Finance and Services Division provides administrative, information technology and operational support to the organization. Lastly, the Policy Communication Research Division provides strategic advice and direction through policy, research and communication activities.

**The Australian International Cultural Council (AICC)**

The AICC is a consultative group established in 1988, which aims to co-ordinate the resources of Government and cultural organizations and obtain sponsorship from the corporate sector to promote Australian culture. It is chaired by the Minister of Foreign Affairs and Trade and its membership is mainly from the private sector, but also includes the Minister for the Arts and Sport, Director General of the Ministry of Culture and the Arts, the Australian Film Commission. It is funded mainly by the Ministry of Foreign Affairs and Trade and partly by the member agencies.

**The Australian Film Commission (AFC)**

The Australian Film Commission (AFC) is the primary development agency for the film, television and interactive digital media industries in Australia, and a major supporter of screen culture. The AFC's main role is in project, practitioner and industry development. It provides:

- Funding for film and television development and post-production;
- Marketing advice and promotion, including coordinating an Australian presence at international marketplaces;
- Support for interactive media development;
- Professional development and production opportunities for Indigenous Australians;

---

<sup>22</sup> <http://www.bidc.com/>

- Policy and industry performance information;
- Administration of the co-production program;
- An archive of Australian films, contemporary radio and TV news coverage and music industry releases.

### **The Film Finance Corporation (FFC)**

In Australia, the Film Finance Corporation (FFC) is the Government's principal agency for funding the production of film and television. It is a wholly owned government company. The FFC's objectives are to:

- Finance the production of a diverse range of Australian film and television programs;
- Maximize opportunities for audiences to view FFC-financed film and television programs;
- Increase the value of productions generated by co-investing with the market and maximizing recoupment;
- Provide a centralized source of market intelligence for the benefit of film and television industry practitioners.

### **United Kingdom**

Population 60,441,457 (July 2005)

GDP US \$1.782 trillion (2004)

GDP Real Growth Rate 3.2% (2004)

GDP per Capita US\$29,600 (2004)

Unemployment Rate 4.8% (2004)

The UK is the third largest market in the world for sales of music and is second only to the USA<sup>23</sup>. It is estimated that Britain may account for as much as 15% of the global music market. The industry is dominated by a number of large multinationals - Warners, EMI, Universal, BMG and Sony - but 90% of music businesses can be classified as small and medium-sized enterprises. The industry's success has been founded on the extraordinary supply and diversity of talent the UK has produced over the last 40 years.

Since devolution in 1998, the administrations of these nations have been responsible for most cultural matters. The UK currently uses an 'arms length' approach whereby the Government enlists a quasi-autonomous non-governmental organization (QUANGO) or a NDPB (non-Departmental Public Body) as the institution that administers the disbursement of Government funds for culture. The UK government's definition of a QUANGO is:

"A body which has a role in the processes of national government, but is not a government department or part of one, and which accordingly operates to a greater or lesser extent at arm's length from Ministers."

Since 1946 there was the emergence of a national body called the Arts Council of Great Britain to distribute government funds to the arts at 'arms-length'. This responsibility was further delegated

---

<sup>23</sup> [http://www.culture.gov.uk/creative\\_industries/music/](http://www.culture.gov.uk/creative_industries/music/)

to three Art Councils in Scotland, Wales and Ireland respectively and further decentralised to include the Regional Arts Boards in 2002.

### **The Arts Council of England**

In 1994, the Arts Council of Great Britain was abolished, and its functions transferred to three new bodies: the Arts Council of England, the Arts Council of Wales and the Scottish Arts Council. In April 2002, the Arts Council of England and the 10 regional arts boards merged to form a single organization. The objectives of the Arts Council of England were

- To develop and improve the knowledge, understanding and practice of the arts;
- To increase the accessibility of the arts to the public;
- To advise and co-operate with departments of Government, local authorities, the Arts Councils for Wales, Scotland and Northern Ireland, and other bodies on matters concerned, whether directly or indirectly, with the foregoing objects.

The Arts Council was responsible to, and financed by, the Treasury through grant-in-aid (funding that comes directly from central government). The arm's length principle meant that while the Arts Council had the freedom to make individual funding decisions without intervention from government, however the organization's activities and expenditure is accountable to Parliament. The organization distributes public funds, including National Lottery funding; commissions research; promotes innovation in the arts; and provides advice and information to artists and arts organizations. The Secretary of State for Culture, Media and Sport appoints the Chair and National Council. Currently there are nine regional offices and a national office. The Direct Arts expenditure of the Arts Council of England was US\$533.9 million for the fiscal year 2002 / 03. An additional US\$203.8 million was spent for broadcasting and the media (including film) through the DCMS for the respective period.

## Department for Culture, Media and Sport (DCMS)



The incoming labour administration elected in 1997 renamed the Department of National Heritage as the Department for Culture, Media and Sport which exists to date. DCMS is responsible for:

- Policy formation in the arts, sport, the National Lottery, tourism, libraries, museums and galleries, broadcasting, film, the music industry, press freedom and regulation, licensing, gambling, the historic environment,

- The listing of historic buildings and scheduling of ancient monuments, the export licensing of cultural goods, the management of the government Art Collection and the Royal Parks.

The DCMS works in close collaboration with the devolved administrations of Ireland, Scotland, England and Wales – sharing information and ideas and consulting them on UK – wide matters for which the DCMS has responsibility. DCMS sponsors the music industry acting as its advocate within Government. The Department works closely with a wide range of industry players and trade associations to identify what can be done to improve the Music Industry's economic performance and to ensure that the industry's concerns are considered in broader Government policy making.

The DCMS is also responsible for setting policy on UK film culture and industry issues, including<sup>24</sup>:

- Sponsorship of the UK Film Council and the National Film and Television School;
- Training and diversity issues in the film industry;
- Certification of British films including co-productions;
- Lead for the UK in the EU Media Programme.

### **The UK Film Council**

The majority of government funding for film is channelled through the UK Film Council which was launched in April 2000. Its two overarching objectives are to:

- Develop a sustainable UK film industry;
- Develop film culture in the UK by improving access to, and education about, the moving image.

The creation of the UK Film Council brought together, for the first time, responsibility for the film industry, film culture and education. The UK Film Council uses grant in aid and money from the National Lottery to support film-making and development, training, education and film culture.

---

<sup>24</sup> [http://www.culture.gov.uk/creative\\_industries/film/](http://www.culture.gov.uk/creative_industries/film/)



## Ireland

Population of 4,015,676<sup>25</sup> (July 2005 Estimate)

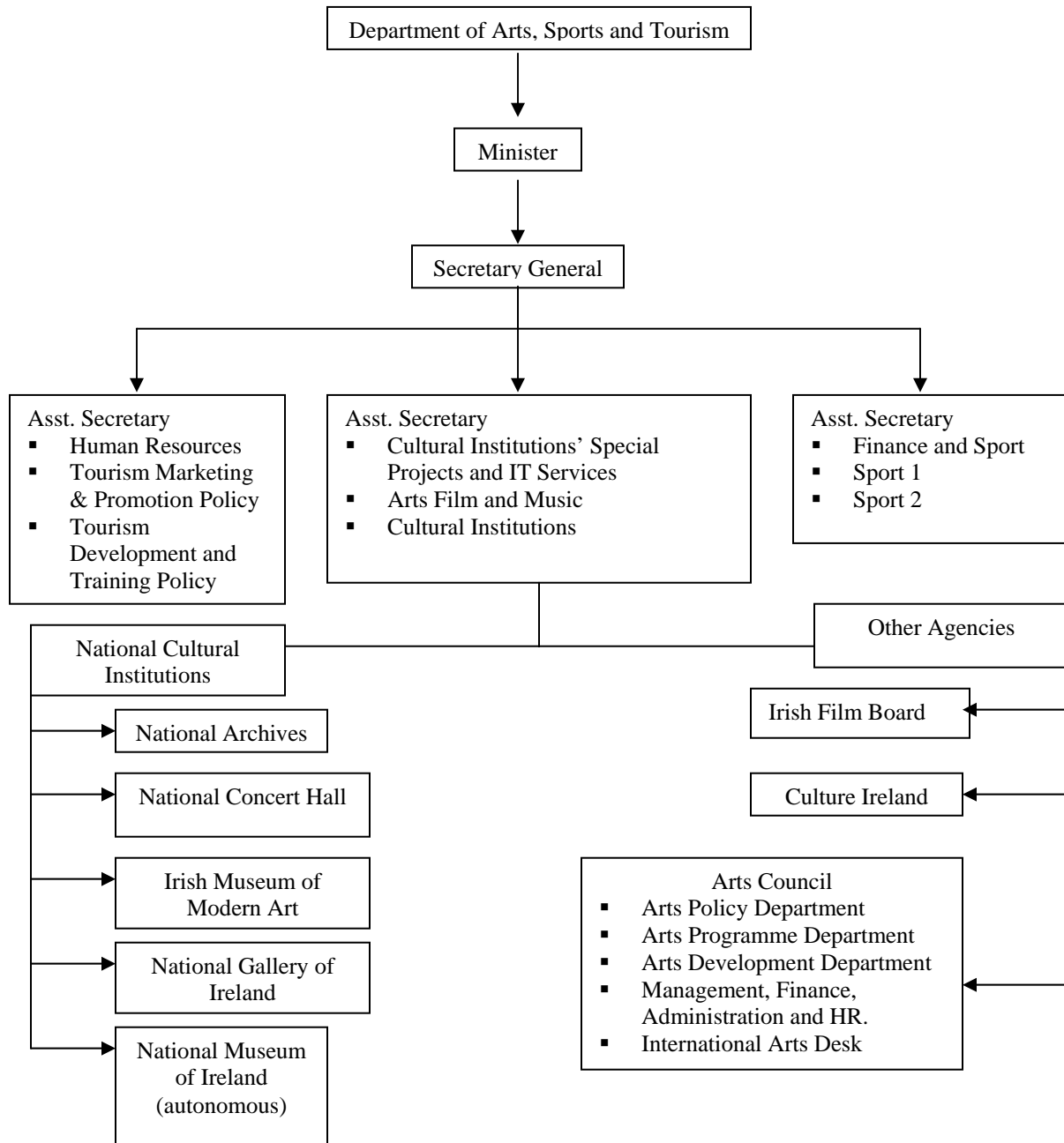
GDP of US\$126.4 billion in 2004

GDP Real Growth Rate 5.1% (2004 Estimate)

GDP Per Capita US\$31,900 (2004)

Unemployment Rate 4.3% (2004)

Natural Gas



<sup>25</sup> <http://www.cia.gov/cia/publications/factbook/rankorder/2119rank.html>

## **Department of Arts, Sports and Tourism**

The Department of Arts, Sports and Tourism was formed in June 2002 and has the responsibility for:

- Policy formation for arts and culture;
- Development of the National Cultural Institutions among others.

Its programme for Government for the period 2002 – 2007 includes rebuilding the national theatre “The Abbey”, securing the long-term strategic development of the National Concert Hall and supporting the Irish film industry. The country has supporting legislation in the Arts Act 2003, the Film Board Act 1980, the National Cultural Institutions Act 1997 and the Heritage Fund Act 2001.

The Arts Act 2003 repeals the Arts Act 1951 and 1973. It gives the Minister statutory responsibility for the promotion of the arts inside the State and abroad. It provides for Arts Council comprising a chairperson and 12 ordinary members and for rotating membership. The first membership of the Council appointed under the Act on 14th August comprises six ordinary members who will serve for a period of 30 months and six for a period of 5 years. The Act provides that the Council shall be independence in the performances of its functions in relation to funding of the arts. The Act enables the Minister to require the Council to establish up to three special committees at any one time to advise it on matters relating to the arts. The membership of each committee will comprise five people. The chair will be selected by the Minister from the membership of the Council, two ordinary members will be appointed by the minister and two by the Council.

One of the recommendations in the Statement of Strategy 2005 – 2007 for the Department is the continuation of the Arts and Culture Capital Enhancement Support Scheme (ACCESS). The ACCESS scheme provides funding for the capital development of arts and cultural facilities (galleries, museums, theatres, arts studios and other creative and performance spaces) around the country. In August 2001, US\$55.82 million was allocated to 44 successful projects.

The Business Expansion Scheme for Music gives tax relief to investors in new and emerging commercial musical acts or groups. The Minister decides whether a project should be certified as eligible for such relief: - certification requires that the act in question has not had sales in excess of 5,000 albums either as a solo artist or as a member of a band. Since it was extended to the music industry, 36 projects have been certified under the BES. This brings the total amount certified for investment under the Scheme to just over US\$7.33 million.

### **The Arts Council** ([www.artscouncil.ie](http://www.artscouncil.ie))

The Arts Council is an independent statutory body established in 1951, which operates under the Arts Act 2003. The main responsibilities are:

- To stimulate public interest in and promote the knowledge, appreciation and practice of the arts;
- Principal instrument of State funding to the arts; and
- Advisory body to Government on arts matters.

The Council commissions and publishes research and undertakes development projects often jointly with other public or non-governmental agencies. The Arts Council is a voluntary body of 12 members and a chair, appointed by the Minister for Arts, Sport and Tourism for a term of five years. The Arts Council supports all aspects of the arts, in Irish and in English - architecture, dance, drama, film, literature, music, opera and visual arts. State support for the Arts Council through the Department has increased substantially over recent years, as follows:

*Arts Council Funding 1998 – 2004 in US\$ million*

2000	2001	2002	2003	2004	2005
55.05	58.80	58.21	53.86	64.11	74.49

The International Arts Desk in the Arts Council aims to provide international arts information to enquirers in Ireland, and information about the arts in Ireland to enquirers from overseas. The term ‘International Arts’ refers to overseas production and events involving the arts from Ireland; international work taking place in Ireland; and transnational cooperation and co-production.

**The Irish Film Board** ([www.filmboard.ie](http://www.filmboard.ie))

Main Responsibilities:

- To assist in the development and production of Irish films;
- To improve the marketing, sales and distribution of Irish films;
- To promote training and development in all areas of film making; and
- To promote Ireland abroad as a film location.

The Irish Film Board provides loans and equity investment to independent Irish filmmakers to assist in the development and production of Irish films. The Board operated in 2003 with an annual capital budget of US\$11.18 million.

**Culture Ireland**

Culture Ireland is the national agency to promote Irish arts overseas. The agency has a budget of \$2.44 million for 2005. Its remit includes the allocation of grants for overseas activity to Irish artists or arts organisations, the funding and facilitation of Irish participation at strategic international arts events and the management of emblematic cultural events either in Ireland or abroad. It is also expected to advise the Minister on international arts and cultural affairs. Culture Ireland supports artists right across the creative spectrum including visual art, theatre, literature, music, dance, opera and film.

**The National Museum of Ireland** ([www.museum.ie](http://www.museum.ie))

The main responsibility is to manage the national collection of artifacts.

**The National Gallery of Ireland** ([www.nationalgallery.ie](http://www.nationalgallery.ie))

Main Responsibilities

- To house and care for the national art collections;
- Provision of art courses, workshops and outreach activities.

**National Concert Hall** ([www.nch.ie](http://www.nch.ie))

Main Responsibilities

- Presentation of musical performances;
- Undertake nationwide musical educational programme.

### **Irish Museum of Modern Art** ([www.imma.ie](http://www.imma.ie))

#### Main Responsibilities

- Collection and presentation of modern and contemporary art.

### **Barbados**

Population 271,600 (2003)<sup>26</sup>

GDP US\$2.5 billion (2002)<sup>27</sup>

GDP Growth Rate 3% (2002)

GDP Per Capita US\$9,423 (2002)

Unemployment Rate

The music industry in Barbados also seems to be penetrating the international market with artistes such as Rupee signing with a major international recording label and Allison Hinds on the verge of signing. The industry generates approximately US\$20 – 25 million in foreign exchange earnings<sup>28</sup>. This is largely influenced by the Barbados Cropover and the Barbados Jazz Festival.

### **Barbados Arts Council**

The Barbados Arts Council is a non-profit organization established in 1957, the Barbados Arts Council is the oldest continuing organization of its kind in Barbados. The institution's mandates are to encourage and develop activities in virtually all forms of artistic expression, and to advise and assist the Government in matters relating to the arts. Over the years, the BAC's scope has narrowed, and now focuses almost entirely on the visual arts."

### **Barbados Gallery of Art**

The Barbados Gallery of Art was opened in 1996.

### **Barbados National Cultural Foundation** <http://www.ncf.bb/>

The National Cultural Foundation is a statutory body under the Prime Minister's Office, which was established by an Act of Parliament in 1983. Its mandate is to oversee the cultural landscape of Barbados. This organization offers developmental and training programmes in the literary, visual and the performing arts. Foundation is tasked with moving the artists and their products toward the next level where they are equipped with the tools and framework-legally, financially and administratively in order to exploit the economic benefits from the various cultural industries. The work of the organization covers literary arts, theatre arts, dance and music. The Foundation is managed by a Board consisting of 11 members who are appointed by the Minister responsible for Culture, and fifty-six members of staff.

---

<sup>26</sup> <http://www.centralbank.org.bb>

<sup>27</sup> <http://www.bidc.com/>

<sup>28</sup> Nurse, Keith. "The Cultural Industries and Sustainable Development in Small Island Developing States." Available at [http://portal.unesco.org/en/file\\_download.php/b53a9208f4f4172298eb47e4b1177d4cCLT3.doc](http://portal.unesco.org/en/file_download.php/b53a9208f4f4172298eb47e4b1177d4cCLT3.doc)

The Foundation administers the following to assist the creative industries:

- Commonwealth Arts and Craft Awards - an award scheme for young artists and craftspeople, sponsored by the Commonwealth Foundation. Up to ten awards (ranging from US\$5,400 – \$10,800) are granted every two years to craftspeople and artists, aged 20 between 20 and 35 to go on an internship in a Commonwealth country for a period of between 3 – 6 months;
- Cultural Action Fund (CAF) – launched in December 2004 with resources from the Combined Lottery Agreement. There are three levels of grants up to a maximum of approximately US\$25,000.00 and renewable up to three years. Projects can include research on the Cultural Industries, training and development, innovative products and services in film, visual arts, performing arts, literary arts and cultural heritage; and the development of databases and new technologies aimed at improving the overall management and administration of the sector. Up to US\$200,000 was awarded in the first cycle.

## **Jamaica**

Population 2,735,520 (July 2005 Estimate)<sup>29</sup>

GDP of US\$11.13 billion (2004)

GDP real Growth Rate 1.9% (2004)

GDP Per Capita US\$4,100 (2004)

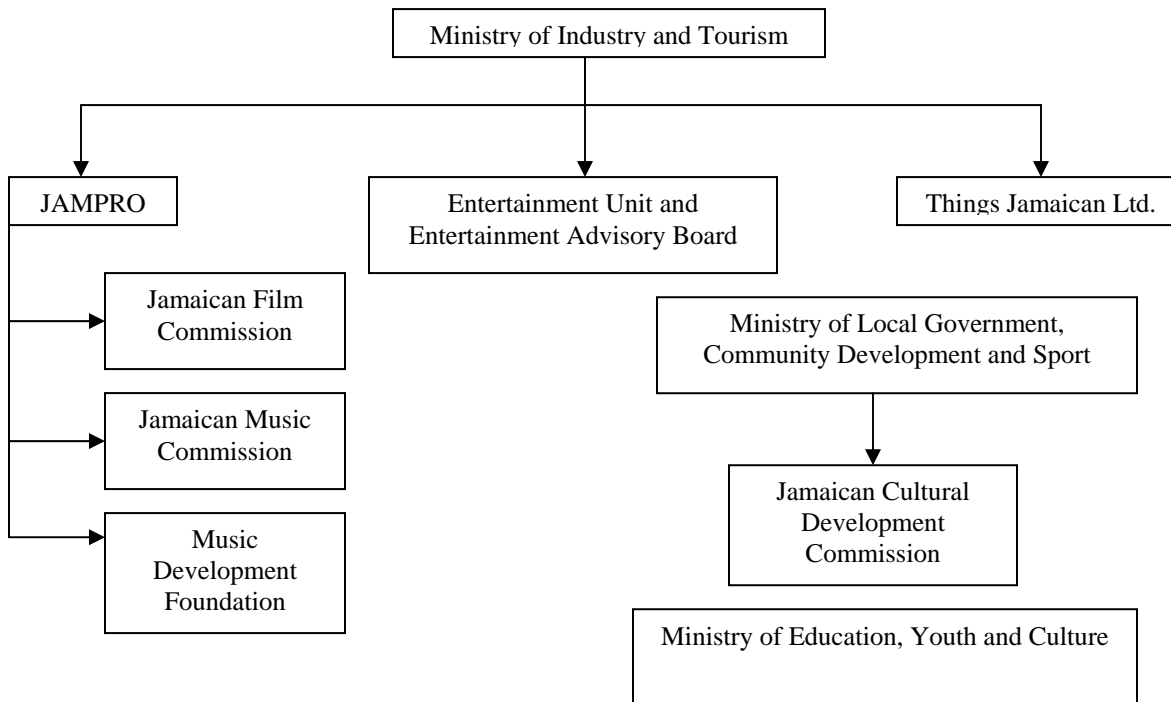
Unemployment Rate 15% (2004)

There are several Jamaican artists who have “made it” in international markets such as Bob Marley, Sean Paul, Elephant Man, Bennie Man, Shaggy, Jimmy Cliff, Inner Circle, Patra, Third World, Diana King, and Buju Banton. The Jamaican music industry is estimated to employ 15,000 people and controls 15 – 20% of the US\$300 million in Reggae music sales. In addition, some US\$80 – 100 million is generated in foreign exchange earnings<sup>30</sup>

---

<sup>29</sup> <http://www.cia.gov/cia/publications/factbook/rankorder/2119rank.html>

<sup>30</sup> Nurse, Keith. “The Cultural Industries and Sustainable Development in Small Island Developing States.” Available at [http://portal.unesco.org/en/file\\_download.php/b53a9208f4f4172298eb47e4b1177d4cCLT3.doc](http://portal.unesco.org/en/file_download.php/b53a9208f4f4172298eb47e4b1177d4cCLT3.doc)



### **JAMPRO (Jamaica Promotions Corporation)**

JAMPRO is Jamaica's investment/export promotions and facilitation agency. Their mandate is to initiate and coordinate the development of plans, programmes and policies for the economic and financial development of Jamaica<sup>31</sup>. JAMPRO provides a wide range of services, which includes conducting research on national development issues. JAMPRO also undertakes consultancy activities for government entities, manage external cooperation agreements and interfaces with funding agencies, while maintaining a national socio-economic library<sup>32</sup>.

### **The Jamaican Film Commission (<http://www.filmjamaica.com/>)**

The Jamaican Film Commission (established in 1984) is part of the Jamaica Promotion Agency (JAMPRO) and its emphasis is the promotion of Jamaica as a location for international film projects. Their budget in 1998 was US\$510,000 and for 2004 it is US\$110,000.

The Film Commission supports the local film industry in a number of ways including training, facilitation of the importation of equipment duty free and some marketing. The Film Commission acts as a one-stop office that takes the producer from the pre-production through the production stage. The office assists with:

- Location scouting and location photographs;
- Identifying production crew;
- Sourcing production equipment;

<sup>31</sup> <http://www.investjamaica.com/> About JAMPRO

<sup>32</sup> <http://www.investjamaica.com/> About JAMPRO

- Visa and work permits;
- Alien registration (required for those who will be the country for six months or more);
- Waiver of duty/bond on equipment, wardrobe, expendables and personal effects;
- Specialized import permits for items such as, firearm (real or fake), explosives, animals, motor vehicles and fresh foods and meats.

In 2003, Jamaica's on-location film industry doubled its earnings, realizing US\$14.3m from a wide variety of film projects, music videos, and even a reality series shot on location. This represents more than 100 per cent increase over the almost US\$6.43 million earned in 2002.

### **Jamaican Music Commission**

The Jamaica Music Commission is a statutory non-commercial body operated on a partnership basis by a conglomeration of recognized organizations and the Government<sup>33</sup>.

The Commission focuses mainly on education and training, infrastructure, product development, marketing and financing within the entertainment industry.

### **The Music Development Foundation**

The Music Development Foundation was established to finance activities such as the National School Music Instrument Programme, the National Band and Choir Competition, music business education and scholarships. Revenue is generated through the receipt of grants and donations, taxes levied on audio-visual and entertainment products, and various other ventures.

### **Entertainment Unit of the Ministry of Industry and Tourism**

The Entertainment Unit has developed and proposed an entertainment sector policy to facilitate the development of a globally viable Jamaican entertainment industry and the preservation and enhancement of the creative expression of the Jamaican people. The Entertainment Unit operates with the following objectives:

- Position the entertainment sector as a national priority, in recognition of the pivotal role the sector plays in social and economic development.
- Foster, encourage and facilitate the development of a globally viable Jamaican entertainment industry.
- Act as the unifying force for the integrated development of entertainment as a cultural industry.

### **Things Jamaican Ltd.**

Things Jamaican Ltd. is a company established under the Companies Act. The functions of this institution are:

- To promote craft work through research, design and the provision of guidance in manufacturing and business practices;
- To market quality craft work with Jamaican motifs for both the tourist and local markets;
- To develop and market the Devon House property in a manner consistent with its designation as a national monument.

---

<sup>33</sup> <http://www.mfg-law.com/dec2001-b.html> *Newsletter: Developments in the Entertainment Industry* Vol.13 Issue 4 December 2001

Operating as a part of the Ministry of Industry and Tourism, the focus of Things Jamaican has shifted to the operation of sales outlets located at Devon House, the Norman Manley and Donald Sangster Airports and Fort Street, Montego Bay. Things Jamaican is presently operated by the Jamaica Business Development Centre

**The Jamaica Cultural Development Commission (JCDC)** <http://www.jcdc.org.jm/index.php>

The Jamaica Cultural Development Commission (JCDC) is a government organization, which began in 1963 as the Jamaica Festival Commission, charged with the responsibility of promoting the creative talents and cultural expressions of Jamaica with a view to sustaining Jamaica's cultural heritage. The JCDC organizes the annual Independence celebrations and other events of national significance. The Commission also hosts the annual Festival of the Arts, with parish and national competitions in the performing arts, literary arts, fine arts and culinary arts.

The JCDC encourages the development of Fine Arts in Jamaica through the National Fine Arts Competition and Exhibition. This programme encompasses painting, textile/assemblage, drawing, sculpture and ceramics and serves as an outlet for the creativity of both mature and developing artists. The Annual Photography Competition and Exhibition is promoted by the Jamaica Cultural Development Commission through its National Photography Committee, for the encouragement and development of photography as an art form. For Performing Arts, the JCDC organizes the annual Jamaica Festival Speech Competition, the Jamaica Festival Drama Competition, national Festival of the Performing Arts, and annual music competitions.

### **1.4.3 The Role of Cultural Industry Trade Associations and Unions**

Worldwide, cultural industry trade associations and unions have been effective lobbyists in safeguarding the future of the cultural industries. These non-governmental organizations operate with the support of national governmental agencies as they provide critical support in terms of research on issues impacting on the cultural industries; advocacy to national governments on the legislative and policy needs of the cultural industries; and copyright enforcement.

Developed countries trade associations such as IFPI, RIAA, British Phonograph Society (BPS), Canadian Independent Record Production Association (CIRPA), Interactive Multimedia Technologies Association, and Federation Against Software Theft (FAST), have been at the forefront of the battle against piracy. Trade groups fund research on copyright and infringement, collect evidence of piracy and bring legal proceedings against infringers. For example, at the beginning of this year, the RIIA embarked on a new wave of copyright infringement lawsuits against some 753 illegal file sharers, including individual network users at 11 different colleges. The RIAA has also previously brought criminal proceedings against companies Verizon and Napster. Research such as the IIPA's annual report on US copyright industries and the IFPI's commercial piracy report, has been used in advocacy campaigns before national governments<sup>34</sup>.

---

<sup>34</sup> On such notable example is the RIAA's submission to the US Trade Representative on the adequacy of China's intellectual property laws, which advocated that China be placed on the US Government's Special 301 "priority watch list".



Cultural industry trade associations have not flourished within the English-speaking Caribbean, which has contributed to the overall weak industrial environment in the region. In the case of Trinidad and Tobago, many cultural industries trade associations have become inactive due to lack of funding; organizational and strategic direction and low commitment of its members. As outlined above, these associations can be of significant use to the further development of the cultural industries, not only with regard to copyright issues, but also in terms of establishing industry standards, artist fees and codes of practice. Thus efforts should be made to encourage the development of such associations.

#### 1.4.4 Collecting Societies<sup>35</sup>

Collecting societies serve a very important role in safeguarding the rights of copyright holders as well as facilitating the use of copyright works. In much of the world, copyright societies operate as non-governmental organizations that often have statutory basis and may enjoy monopoly powers, with legislation seeking to accommodate the interests of both users and right owners. As such, the role of collecting agencies may be defined as:

“To right owners: provides negotiating power and economies of scale in administration of rights that are usually not otherwise available through the exercise of rights on an individual basis”; and,

“To users: facilitates access to copyright works through a single centralized organization to users who would otherwise be legally obligated to get permission from each individual right owner for each and every use of a copyright work” (Demas and Henry 2001: pp. 88-99).

#### **FIGURE 4: RIGHTS ADMINISTERED BY COLLECTING SOCIETIES**

- Public performance (music played or performed in nightclubs, restaurants and other public places)
- Broadcasting (live and recorded performances on radio and television)
- Mechanical reproduction rights in musical works (in CDs, tapes, vinyl records, cassettes, mini-discs, or other forms of recordings)
- Performing rights in dramatic works (theatre plays)
- Reprographic reproduction of literary and musical works
- Related rights 9the rights of performers and producers of phonograms, to obtain remuneration for broadcasting or the communication to the public of phonograms

*(Extracted from Allison Demas And Ralph Henry (2001  
“Entertainment Services With Special Reference To  
Music, Mas, And Film And Video Segments”)*

<sup>35</sup> For a detailed discussion on copyright collection societies and collection management services, refer to Allison Demas and Ralph Henry (2001)“Entertainment Services with Special Reference to Music, Mas, and Film and Video Segments”, pp.86-99.

There are various kinds of collecting societies, depending on the category of works involved – e.g. music, dramatic works, multimedia productions; and the nature of operations. There are “traditional” collecting societies such Performing Rights Society (PRS), and Copyright Organization of Trinidad and Tobago (COTT) that act on behalf of their members, negotiate rates and terms of use with users, issue licenses authorizing uses, collecting and distributing royalties. Then, there are rights clearance centres that grant licenses to users according to terms and conditions set by individual right owners who are members of the centre. These are used particularly by authors of written works. And, “coalitions” of separate collective management organizations that offer users centralized sources for obtaining authorizations. These organizations have become popular, particularly with the growth of multimedia productions, where a variety of authorizations might be required.

There is no single collective rights management body covering all countries; thus reciprocity is encouraged as enshrined in the national treatment principle of the Berne and Rome Conventions, which states that foreign right owners should be treated in the same manner as national right owners. And so, most established collecting societies belong to international networks comprising groups of societies such as International Confederation of Societies of Authors and composers (CISAC), and the International Federation of Reprographic Rights Organizations (IFRRO). These collecting societies facilitate reciprocal representation agreements, which allow one collecting society in any one country to represent both national and foreign right owners, thereby allowing right owners to receive royalties from abroad (Demas and Henry 2001). CISAC has been active in encouraging international standards for the identification of copyright works such as the International Standard Work Code (ISWC), exchange of rights information between databases and the development of electronic copyright management/digital rights management systems (Caslon Analytic Profile, [www.caslon.com.au](http://www.caslon.com.au)). IFRRO is primarily concerned with photocopying and digital dissemination of text publications.

To date, there are over 200 collecting societies, covering various cultural industries. Of these, copyright societies for authors, composers and music publishers such as UK Mechanical Protection Copyright Protection Society (MCPS) and Performing Rights Society (PRS); American Society of Composers, Authors and Publishers (ASCAP); Society for Reproduction Rights of Authors, Composers and Publishers Canada (SODRAC) are perhaps most well known. Table 12 provides some examples of collecting societies in other areas of the cultural industries.

**TABLE 11: EXAMPLES OF COLLECTING SOCIETIES WORLDWIDE**

Area of Cultural Industries	Collecting Society
Visual Art	Designers' & Artists' Copyright Society, UK Societe de la Propriete Artistique et des Dessins et Modules (SPADEM), France KUVASTO, Finland
Film & Video	Directors' and Producers' Rights Society, UK Video Performance Ltd, UK (licenses the public performance and broadcasting rights of those companies as owners of the copyright in music videos) The Canadian Screenwriters Collection Society TROMB, Norway (actors' collecting society)
Dramatic Works	Drama-ret, Denmark The Playwrights Union of Canada SoQAD, Canada (redistributes to Quebec, Canadian and foreign playwrights whose works are performed in public or private teaching institutions Societe des auteurs et compositeurs dramatiques, Canada (SACD)

**Source:** [www.caslon.com.au/colsocietiesprofile.htm](http://www.caslon.com.au/colsocietiesprofile.htm), "Caslon Analytics Profile: Copyright Collecting Societies".

## 1.5 Global Impacts on Trinidad and Tobago Entertainment Industry

In many ways, the global context of the cultural industries impacts on Trinidad and Tobago's entertainment industry. A Political Economic Social Technological (PEST) analysis suggests that while the global cultural industries market is increasingly competitive and highly concentrated, export prospects for the entertainment industries of Trinidad and Tobago are encouraging, provided that there is continuous investment in the domestic infrastructure and that export initiatives are based on market research and encourage building linkages with existing global infrastructures.

### PEST ANALYSIS

<b>Political/Legal/Institutional Factors</b>
<ul style="list-style-type: none"> <li>▪ The global institutional framework can provide the policy space, through effective negotiations by CARICOM, that would facilitate the growth of Trinidad and Tobago's entertainment industries in the global market</li> <li>▪ Canada's position on cultural diversity at multilateral negotiations can serve as an important linchpin for Trinidad and Tobago's in future multilateral negotiations</li> <li>▪ Canada's institutional investment in the arts and culture is instructive for Trinidad and Tobago in building up the domestic environment of its entertainment industries</li> <li>▪ Collective societies abroad generally fail to monitor effectively the use of music from the Caribbean on metropolitan broadcast media, including media the media serving the diaspora</li> </ul>

### **Economic and Market Issues**

- Concentrated nature of the cultural industries, particularly production and distribution presents high barriers to entry into larger mainstream markets
- Marketing and distribution infrastructures in the global market are extremely sophisticated and tend to be genre specific
- Trinidad and Tobago artists are not considered part of global mainstream entertainment industries, despite popularity within diasporic markets
- The spread of Carnivals and reggae in global cities has effectively widened market opportunities in terms of performance for Caribbean artists
- Market opportunities exist in Japan where pan manufacturing and live pan performance is becoming increasingly popular
- Indian market represents a major area of concentration in the global entertainment industry that can also be tapped for chutney music and dance
- Grammy category for soca can give exposure in US mainstream markets
- Festival tourism is a growing component of the global tourism industry, given the proliferation of Caribbean-style Carnivals and other Caribbean festivals in global cities (Nurse, 2004)
- The Caribbean diaspora is a crucial market for arts and popular culture
- Trinidad and Tobago's carnival arts and popular culture have achieved regional and international acclaim and enjoy strong word of mouth marketing (Nurse, 2004)
- Commercial piracy remains the major cause of declining revenues in the music industry

### **Socio-cultural Issues**

- Global tastes change rapidly and require entertainment industries to always operate ahead of the curve
- Caribbean arts and culture are the basis of identity in the diaspora
- Emphasis on cultural diversity in developed countries has allowed for the incorporation of Trinidad and Tobago's entertainment arts in edutainment programmes e.g. Carnival in Sesame Street
- Many people still do not regard piracy as stealing

### **Technological Factors**

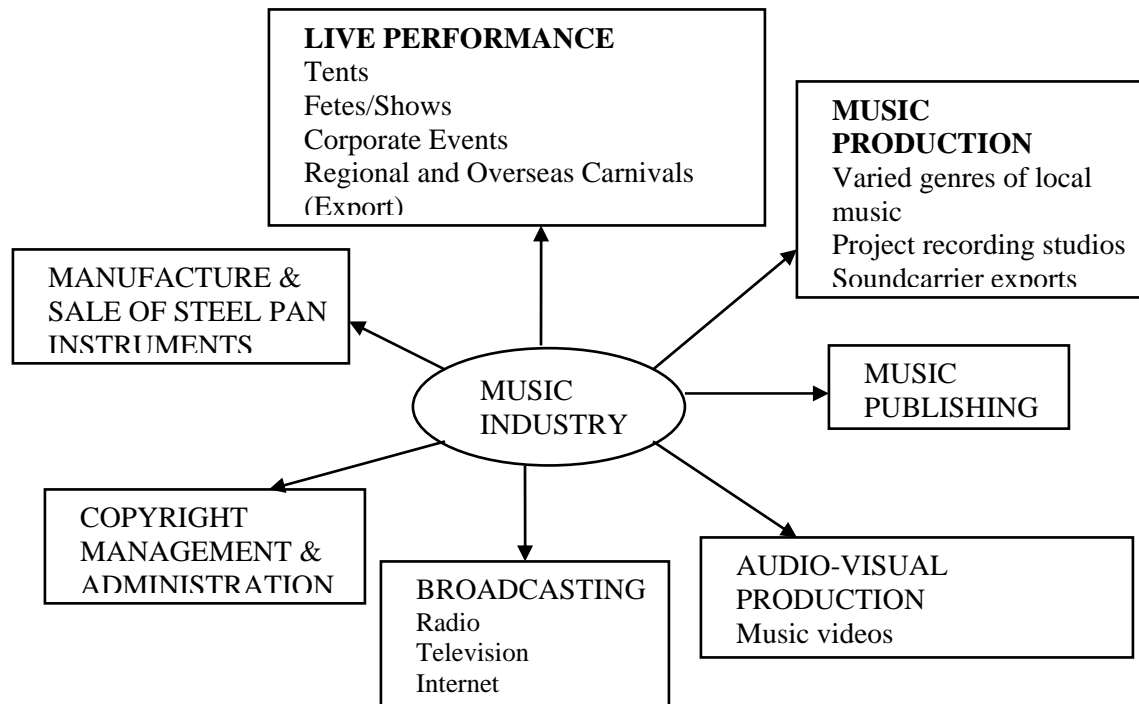
- Digital technologies and electronic commerce are increasingly driving the growth of entertainment industries
- The growth of the internet presents new opportunities for product and market development of Trinidad and Tobago's entertainment industries
- Broadcasting has become a critical asset in entertainment industries – for promotion; branding; establishing brand loyalty; winning corporate support and expanding artists careers
- On-line purchasing of entertainment products and services has outgrown traditional forms of purchase

## 2.0 Trinidad and Tobago Entertainment Industry

### 2.1 Analysis of the Music Industry – Industrial Structure and Context

The Trinidad and Tobago music industry comprises an array of products and services that can be classified under seven main areas of economic activity (see Figure 5). Of these, music production, music publishing, live performance, manufacture and sale of steel pan instruments are the core economic activities; while audio-visual production, broadcasting, and copyright administration are considered non-core economic activities as they provide essential support services for the effective functioning of the overall industry.

**FIGURE 5: STRUCTURE OF THE TRINIDAD & TOBAGO MUSIC INDUSTRY**



#### 2.1.1 Music Production

The plural ethnic mix of Trinidad and Tobago has encouraged the development of a diverse repertoire of music that is indigenous to Trinidad and Tobago, alongside the global mainstream genres of jazz, gospel and rock (see Table 13). Over the years, most of these genres have become commercialized through local record production, which has evolved into a steady business activity.

**TABLE 12: TRINIDAD & TOBAGO MUSIC GENRES & SAMPLE OF RECORDING ARTISTS**

Genre	Est. No. of Recording Artists*	Sample of Best Known Recording Artists/Groups
Calypso	100	Mighty Sparrow, Shadow, Black Stalin, David Rudder, Crazy, Calypso Rose
Soca	500	Anselm Douglas, Nigel Lewis, Machel Montano, Denise Belfon, Destra, KMC, Iwer George
Rapso	50	Brother Resistance, 3 Canal
Chutney Soca	80	Rikki Jai, Heeralal Rampartap
Parang**	14	Scrunter, Crazy, Los Reyes
Steel Band	22	Exodus, All Stars, Desperados, Invaders
Pan Jazz	15	Liam Teague, Ken "Professor" Philmore, Darren Shephard
"World Beat"/Jazz	8	Mungal Patasar & Pantar, Moyenne, Elan Parle
Gospel	100	Love Circle, Angela Williams, Sherwyn Gardner
Rock/Alternative	10	Orange Sky, Joint Pop, Cobolized

\*These numbers also include artists that record on demos.

\*\*Includes parang-soca

**Sources:** Interviews with Music Industry Professionals, September 2004; Henry S. Gill and Allison Demas (2001) "Entertainment Services with Special Reference to Music, Mas, and the Film and Video Segments", presented to Caribbean Regional Negotiating Machinery.

As one of the oldest enterprises in the entertainment industry, the recording studio was initially used to record and produce the work of calypsonians, and has since expanded to other related commercial activities such as mastering, mixing, music publishing and music retail. Research shows that there are currently 13 established project studios in Trinidad and Tobago. There are also a number of small bedroom studios with some digital capabilities that mainly serve the needs of new artists. Data from a previous study puts the earnings of the sector at approximately TT\$78 million in 1998 (Nurse 1999). Revenue totals in 2004 for a well-established project studio show that a fully operational studio can earn approximately TT\$900,000 in one year. Of this amount, approximately 90% is derived from studio work.

Growth of the human resource capability within the recording industry appears slow, as evidenced by the relatively low numbers entering the field of sound engineering and music production. Membership records of RIATT indicate that some 35 persons in the industry formed the organization in 1995. Since then, it is estimated that approximately only 30 persons have entered the field as studio apprentices. Eagerness to become a sound engineer or record producer is not easily satisfied, since there are few avenues of training in the field in Trinidad and Tobago. Currently, there are three sound production companies that offer training that is geared for seasoned producers and engineers seeking to upgrade their skills, than for apprentice studio assistants. It has been observed that many young studio workers are currently operating without the requisite "studio-ready" skills even though they have undergone some level of training. This is of grave concern since studio assistants play a critical role in the day-to-day operations of the studio. Moreover, success of the overall industry highly depends on its workers having the relevant skills to produce quality work. There is, therefore, a void in the training capability

within the industry that can seriously impede the further development of the sector in the long run.

To date, there are approximately some 900 recording artists in Trinidad and Tobago, most of who record in calypso and soca. These artists/groups collectively account for about 76%, while recording artists/groups in other indigenous genres such as chutney soca and rapso represent approximately 10% and 6% respectively. Artists/groups recording in the national instrument pan, account for a mere 5%. These low numbers are symptomatic of the relatively low domestic demand for legitimate product. This has become a major deterrent to record. The situation is further compounded by the relatively limited airplay given to these genres<sup>36</sup>. Piracy also affects music sales - local consumers tend to purchase pirated compilations of music. Overall, this has inhibited the growth of music production in these genres.

On the other hand, gospel music has experienced more positive growth as a recorded genre. Demand is spurred primarily by the growing need of churches and choirs for pre-recorded “church” music; as well as the desire by audiences attending commercial gospel concerts to own CDs of the performing artists and groups. Table 14 shows a sample of top gospel acts in Trinidad and Tobago and the corresponding number of albums produced to date. It is anticipated that music production in this genre will continue to grow, as other industry linkages begin to develop specifically for the genre, such as music festivals, event management companies, artist management agencies; publicists and booking agents (Mc Barnett 2004: 26).

**TABLE 13: SAMPLE OF MUSIC PRODUCTION IN GOSPEL**

Artist/Group	No. Of Albums
Love Circle	9
Angela Williams	5
Sherwyn Gardner	3
Sean Daniel	2
Royal Priesthood	1
Broadway Boyz	1
Word	1
Righteous Restoration	1
Celestial Harmony	4 singles

**Source:** Alana Mc Barnett (2004) “Export Plan of Caribbean Gospel Music”, Unpublished Thesis, Centre for Creative and Festival Arts, The University of The West Indies.

Similarly, the number of rock bands recording has been steadily increasing. Approximately 10 have consistently recorded albums, most of which are targeted at the major record labels. Of particular note is the band *Orange Sky*, who has recently recorded its first international 12-track album under the Pyramid Record Label, and is targeted for worldwide distribution via the Universal Music Group by early 2005 (The 411 Entertainment, 2004). It is anticipated that other bands in this genre will make similar moves as the growth of recordings in rock continue to increase.

---

<sup>36</sup> This issue is further discussed under the subsection “Broadcasting”.

The dominance of calypso and soca in the recording industry primarily stems from the demand created by Carnival, locally and within the diasporic markets abroad. For the most part, music production within the recording industry in Trinidad and Tobago tends to peak a few months before the start of the upcoming Carnival season in September and dramatically declines by the start of the season. As such, music production in Trinidad and Tobago can be deemed as largely a product of its carnival economy<sup>37</sup>.

Although this linkage has generated significant benefits for the recording sector, it has also created the potential negative impact of seasonal production. The predominance of seasonal recording inhibits the recording studio from establishing and maintaining appropriate operating levels throughout the year that would allow it to maintain financial viability. Outside of the Carnival recording period, business for a few of the more established recording studios is mostly generated from studio rental and music production by regional and foreign-based artists. Some studios have also carved a niche in producing commercial jingles for the advertising and business sectors. Currently, there are approximately four recording studios that provide this service.

There have also been negative consequences for parang music, which is increasingly becoming marginalized as a recorded product. Radio airplay and retail sales of parang CDs are not guaranteed, because of the increasing dominance of calypso/soca during the Christmas season (the lead-up period for the Carnival season). As a result, the impetus to record parang music continues to steadily decline.

### 2.1.2 Live Performance

Across the genres, performing artists far outnumber recording artists – industry sources estimate that there are about 4,000 performing artists in Trinidad and Tobago, spanning all genres. Table 15 shows that there are approximately 2,900 performing artists in calypso/soca, rapso and chutney soca. Performance has increasingly become the main source of income for the artists/music groups, due to declining local music sales, limited broadcast exposure and limited financial resources to produce and market an album. As a result, many artists tend to skip production and move on to commercial exploitation through live performance, after having created the song or music (Demas and Henry, 2001). This is particularly the case for all the genres identified below.

**TABLE 14: NO. OF PERFORMING ARTISTS ACCORDING TO SELECTED GENRES**

Genre	No. Of Artists
Calypso/Soca	2,000
Rapso	100
Chutney Soca	800*
TOTAL	2,900

\*Does not include dancers and other performers likely to accompanying chutney soca singers.

**Source:** Interviews with Music Industry Professionals, September 2004.

Most economic activity in the music industry revolves around live performances in the two–three months leading up to the annual Carnival, and at the Trinidad-type carnivals around the globe

<sup>37</sup> This issue is further discussed under the section “Carnival and the Music Industry”.



(Nurse 1999). Within the domestic market, the demand for live performance comes from calypso tents, calypso shows and carnival fetes. Of these, the Carnival fete has become the most lucrative source of income, as local consumer tastes and interests continue to shift away from the calypso tent. The carnival fete can pay the soca artist between TT\$2,000 - \$5,000 per gig, and a music band between TT\$3,500 - TT\$40,000 (Table 16).

**TABLE 15: 2004 LIVE PERFORMANCE FEES, LOCAL MARKET**

Type Of Gig	Fees Per Gig (TT\$)	
	Artist	Music Band
Carnival Fete	2,500 – 5,000	3,000 – 40,000
Calypso Tent (weekly)	1,000 – 5,000	15,000 – 20,000
Calypso Show	1,000 – 3,000	9,000 - 15,000
Other Shows*	1,500 – 9,000	N/A
Nightclub	500 – 3,000	2,500 – 10,000

\*Refers to large local shows featuring foreign-based artists, and the local artist/band has been hired to make a special appearance.

**Source:** Interviews with Music Industry Professionals, September 2004.

Calypso shows are noticeably becoming popular as the trend towards themed-based shows such as “Girls Night Out’, Calypso Comedy”, “Battle of the Sexes”, “Woman Is Boss” and “Children’s Spektakula” has now become a norm. These shows have given calypso/soca artists and bands an additional source of income during and after the Carnival season. The nightclub scenario is much the same, where soca/calypso artists in particular, have become regular features. Whereas in the past the nightclub management hired the performing artist/band, it is now the promoter of the event that secures the services of the band/artist to perform in the nightclub. This change in contracting agent has contributed to the growing number of engagements of this nature for the calypso/soca acts and has allowed the performing artists to develop long-standing business with promoters outside of the carnival season.

In contrast, earning levels within the calypso tent are smaller. Weekly performance fees range TT\$1,000 – TT\$5,000 for the individual artist, and TT\$15,000 – TT\$20,000 for the music band. The high-end fee is usually paid to the calypso stars in the tent. Each tent attempts to secure at least two stars so as to ensure large audience attendance. It is estimated that a calypso star can earn about TT\$40,000 for a season.

**TABLE 16: TRINIDAD & TOBAGO CALYPSO TENTS AND CAST SIZE, 2004**

Calypso Tent	Cast Size* (Approximate)
Kaiso House	23
Klassic Russo	24
Kaiso Karavan	21
Kaiso Showcase	17
Power House	15
Eastern Stars	14
Spektakula	18
Calypso Revue	20
Caribbean House of Stars	21
Birds Calypso Tent	N/A

\*Refers only to performing artists.

**Sources:** Interviews with Music Industry Professionals, September 2004; TUCO Website (2004)

In spite of the lower income range, the number of calypsonians performing within the tent arena remains healthy. Most tents have a cast of no less than 16 calypsonians (see Table 17). The growing numbers may be in part attributed to the continual development of the artform by organizations such as TUCO the representative body for calypsonians. Many of Trinidad and Tobago's top calypso/soca acts started their careers as performing artists in the competitions arranged by the NCC, TUCO and other organizations. As such, competitions of this nature are regarded as an important stage of training and development for newcomers on live performance and should be fostered.

Steelband performances center around the Carnival fetes and the annual steel pan competitions. These events do not generate large sums of income for the players - on average a pan player earns about TT\$600 for performing during the Carnival season. This does not encourage serious development of the artform as a career. With few income opportunities, steel bands generally rely on government investment and huge capital outlays from corporate sponsors, apart from the revenue derived from pan concerts during the carnival off-season. Thus, most pan players regard their involvement as a hobby and are otherwise employed. The few, who have made pan a career, have done so as solo artists, and generally work in the foreign music festival market particularly jazz festivals. For the steelbands, securing overseas performances have been mainly dependent on how well they score in the most recent Carnival pan competitions. Some steel bands have also established linkages with regional and international festivals, for which they secure gigs on a consistent basis. However, a relatively small number of bands in the pan fraternity secure gigs in the foreign markets in this way.

Similarly, for the calypso/soca artist and music band, securing gigs in the diasporic Carnivals and festivals is heavily dependent on the artist's/band's level of popularity in the recent Carnival season. Artists are likely to earn around US\$3,000 for a performance with a hit song(s), and about US\$1,000–US\$2,000 if the artist has not produced a hit that year, but can still command audience appeal. Music bands can earn US\$3,000–US\$20,000 (Montano 2004). Performance fees for gigs within the diasporic markets are usually accompanied by per diem for each artist and band member, airline tickets, departure taxes, and ground transport (see Table 18).

**TABLE 17: EXPENSES COVERED BY PROMOTERS IN DIASPORIC MARKETS**

Expense	US\$	£
Per Diem	\$35 per day/per person	£20 per day/per person
Airline Tickets	\$300-\$500 per ticket	£650 per ticket
Dept. Tax from Trinidad & Tobago	\$16 per person	£9 - £10 per person
Hotel Accommodation	\$99 - \$200 per night/per person	£100 - £200 per night/per person
Ground Transport	\$100 - \$400 per trip	Unknown

**Source:** Elizabeth Montano (2004) “An Export Plan for Machel Montano and Xtatic Music Band”, Unpublished Thesis, Centre for Creative and Festival Arts, The University of the West Indies.

The case is not the same in the mainstream market of college gigs and art festivals, where the artist/music band is expected to fund the trip including per diem and accommodation, or accept minimal or no payment for performance (Montano 2004). In spite of the less than attractive fee package and the low economic returns in the short run, these gigs are considered an important avenue for breaking the mainstream market. Consequently, some of the top calypso/soca acts have begun to explore this market with considerable zeal within the last two years.

A recent trend to note is the growing demand for chutney soca artists to perform abroad within the Indo-Caribbean and Indo-diasporic communities. While the genre has not yet created the same impact as calypso/soca in the diaspora, chutney soca experts hold the view that the genre has serious potential in the other markets spaces such as Montreal where there is a growing East Indian community; as well in India, Sri Lanka, Pakistan and the Arabic countries, where the music is very similar to chutney soca. It is felt that this can give chutney soca the opportunity to generate a similar appeal with the right marketing strategy.

Overall, there has been a notable increase in income from overseas performances (see Table 19). In 1998, artists and music bands earned a total of TT\$84.6 million from overseas performances. By 2003, overseas performance income had increased to approximately TT\$96 million, which does not include performance income for pan ensembles. Of this amount, soca artists and soca bands continue to show high income growth collectively, having moved from TT\$54.7 million in 1998 to TT\$66.8 million in 2003. The growth trend indicates that overseas performances are likely to remain the main source of income for artists. It further signals the need for the development of initiatives that would further expand this form of export, not only for the economic viability of individual artists and groups, but also for the long-term sustainability of the local music industry.

**TABLE 18: OVERSEAS PERFORMANCES, 1998 COMPARED TO 2003  
(TT\$000's)**

	1998	2003
Soca Bands	32,850	48,000
Soca Artists	21,900	28,800
Pan Ensembles	17,970	N/A
Chutney Soca Artists	11,860	19,200
<b>TOTAL</b>	<b>84,580</b>	<b>96,000</b>

**Source:** Interviews with Music Industry Professionals, September 2004

### 2.1.3 Manufacture and Sale of Steelpan Instruments

Although most musical instruments used locally are manufactured and purchased abroad, there is a small domestic market for the steelpan. It has been noted that as the national instrument of Trinidad and Tobago, the steel pan “offers a unique market for manufacturing, sales, and performance” (Henry et. al. 2001). This view still holds much credence; however, the current mode of production within the domestic market may eventually stagnate market growth both locally and beyond.

To date, there is still only one mechanized production factory in Trinidad and Tobago, which utilizes some manual operations such as sinking the drums, grooving, and tuning with basic tools. This production process pales significantly to the advanced industrial production process used in the metropolitan countries. This process often results in poorly made instruments that are not up to global standards. It would appear that this has begun to affect demand for local pans in the domestic market as is evidenced by the growing number of imported steel pans (see Table 20).

**TABLE 19: STEELPAN IMPORTS, 2001 – 2003 (TT\$)**

2001	2002	2003
31,515	72,140	71,777

**Source:** Central Statistical Office, 2004

In spite of this, steelpans still represent a major export earner within the music industry, although the export growth rate has been inconsistent over the past three years (see Table 21). In 2001, the value of steel pan exports stood at TT\$3.2 million; in 2002 this figure notably declined to TT\$2.5 million. In 2003, the value of exports rose again slightly to TT\$2.8 million. It is therefore felt that emphasis must be placed on updating the manufacturing process locally so as to improve the competitive potential of Trinidad and Tobago as a pan manufacturing location.

**TABLE 20: STEELPAN EXPORTS, 2001 – 2003 (TT\$)**

2001	2002	2003
3,243,923	2,527,860	2,839,859

**Source:** Central Statistical Office, 2004

### 2.1.4 Audio-Visual Products

Over the last decade, the music industry has become increasingly aware of the value of audio-visual products as marketing tools and merchandise. Currently, three forms of audio-visual products are used in the industry: music videos for promotion; videotapes as merchandise; and DVDs as merchandise and as artist media kits.

Of these, music videos are extensively used within the industry, and are likely to become an even more popular choice with the launch of local music channel Synergy TV, which is dedicated to promoting Caribbean music. Developments in technology have encouraged improvement in the concepts and technical quality of local music videos across the board. One of the more interesting concepts to emerge for the Carnival 2005 season is the use of animation in music videos.

Use of music videos for promotion is highest among soca artists. Currently, there are three audio-visual production companies that produce music videos in Trinidad and Tobago. There is also a growing practice of hiring free-lance producers to shoot the video. The cost of a music video can range from TT\$40,000 to as much as TT\$120,000, depending on the concept and the technicality involved. However, within the last two years the cost of most local music videos has generally ranged between TT\$40,000 – TT\$60,000. This cost is usually borne by the artist and not the producer of the song or the management of the artist, as is done in the global music industry. This is primarily because of huge financial overheads and the difficulty in securing a return on investment through the sale of CDs and other merchandise. There are a number of artists that are not in a strong financial position to wholly finance music video production, nor are they able to execute the required marketing follow-up to make international break-throughs.

During the late 1990s, the production of videotapes of live performances such as “Panorama”, “Parade of the Bands”, became a growing trend as event promoters recognize the role of these videos in diversifying their income stream and lengthening the shelf life of a local event as a product. The demand for these videos has been highest within the diasporic markets. Many are purchased by returning nationals during their Carnival holiday and are also exported via the suitcase trade to the diaspora. This has made it difficult to accurately track the export levels. Since the turn of the decade, it appears that this form of merchandise has declined. This may be attributed to declining interest of the consumer market and the growing obsolescence of the videotape as a merchandise audio-visual product. Globally, the DVD has since replaced the videotape in this regard.

Within the last two years, there has been an isolated attempt to use DVDs for the creation of electronic media kits (e-kits) and for the development of an alternative, more high-end merchandise. To date, soca artist Machel Montano has been the only artist to produce a DVD of live performance for sale. He is also the only artist to have developed an e-kit as a method of marketing in the foreign markets. This media of marketing is likely to grow, given the increasing and fast-paced changes in technology that continue to affect the production and delivery modes in the music industry. With the growing use of web sites within the industry, the use of CDs, DVDs and other digitized audio-visual carriers in this regard, is likely to become more common-placed.

### **2.1.5 Broadcasting**

Over the last decade, the broadcasting landscape of Trinidad and Tobago has experienced tremendous change. In 2003, 13 licenses were issued for broadcasting on the FM band, two of which are dedicated to local/Caribbean music. There are approximately 17 FM radio stations, 4 local television channels, and two cable television companies. Given the size of the sector, it is clear that the local broadcasting sector can provide strong media support towards furthering the development of the local entertainment sector. However, most broadcast companies do not place high priority on airing local music. A survey of genres of music played on FM radio stations illustrates this, where it is shown that less than half dedicate even a small portion of their programming to local music (see Table 22).

The case has been the same in the television broadcast sub-sector until the recent entry of local and Caribbean content channels *Gayelle the Channel*, and *Synergy TV*, which have improved the

imbalance in local television programming (see Table 23). These two channels have disproved the widespread belief that local audiences are not interested in viewing local and Caribbean content, and that major corporate entities are not interested in investing in projects of this nature. But, in spite of this dramatic impact on the broadcasting landscape, the importance of local content on radio stations remains sidestepped and viewed as passé. This is well exemplified by a comparison of airplay during and after Carnival. Outside of the Carnival season, only 4 out of a possible 17 FM radio stations dedicate significant portions of their airtime to local music; during the festival season, this increases to five stations. Overall, airtime dedicated to local music compares weakly to the overwhelming amount of foreign music that is played.

**TABLE 21: FM RADIO STATIONS AND GENRES OF MUSIC PLAYED**

Radio Station	Music Genre Focus
Central Radio 90.5 FM	East Indian Film Songs
WACK 90.1 FM	Local music
Trini Bashment 91.9 FM	Calypso and Soca
92.1 FM	Gospel
Hott 93.1/93.5 FM	Pop; soft rock
Radio Shaktie 94.1	East Indian music
The Rock 95.1	Soft Rock; pop
I 95.5 FM Citadel Ltd.	Predominately talk radio
96.1 W.E.F.M	Hip hop; R&B; dancehall; soca (during Carnival)
Music Radio 97 FM	Adult contemporary music
98.1 FM	Gospel
Masala Radio 101	Bollywood music and contemporary mixes of genres
Power 102 FM	R&B; dancehall; some calypso and soca
WABC 103 FM	East Indian, Chutney, Soca Chutney, Local Indian,
Ebony 104 FM	R&B; Hip Hop
Radio Tempo 105 FM	Calypso; dancehall; R&B
Classic Radio 106 FM	Classical Indian music

**TABLE 22: SURVEY OF PROGRAMME CONTENT ON TELEVISION CHANNELS**

Channel	Programme Content	Local % of Programming
Cable TV	Mainly US arts, culture, entertainment, current affairs	Nil
The Information Channel	Local and international current affairs, knowledge programming	35%
Gayelle The Channel	Local/Caribbean arts, culture, sport and current affairs	100%
IETV	Unknown	unknown
Synergy	Local and Caribbean music and entertainment	100%
TV6	Mainly US programming with some local content	25%
TTT	Mixture of local and foreign programming	45%

The current programming imbalance essentially reflects the mindset among most radio broadcasters that policy favouring local content can eventually lead to a decrease in radio listenership and in turn deter advertisers from using radio as a marketing medium. The recently

formulated broadcast policy supports this view and does not give much credence to the need for legislation on local content. This policy stance can be attributed to the fact that while the broadcasters have been able to strongly present their case, the music industry, on the other hand, has not been able to effectively lobby its case and gain the support of the wider society. As a result, there continues to be strong resistance to increasing the local content quota on the airwaves, even in the face of growing popularity of Caribbean music on the international airwaves.

Overall, this situation has translated into a latent appreciation for local music and the acceleration of a downward spiral for the local music industry. Local audiences, particularly in the 13 - 35 age range, heavily absorb what the radio stations, cable television and the Internet offer and generally only listen to local music during the annual Carnival season. But, the problem is also exacerbated during the carnival season when the local stations that do condescend to play local music, have a heavy rotation of what some industry sources refer to as “jam and wine” music, thereby excluding a large body of calypso, rapso and chutney-soca from their playlists. As a result, many recording artists focus more on creating “jam and wine” in order to get their work played on the airwaves and to be able to secure a hit for the Carnival season.

Lack of appreciation for local content has also impacted on local sound-carrier sales. There is the general consensus within the industry that locals and those in the diaspora do not buy legitimate product, but are more inclined to purchase pirated copies of the music. Most artists are able to sell most of their product during the period immediately after Carnival, since visitors tend to purchase the product as a memento of their Carnival vacation in Trinidad. As a result it is difficult for the average local artist to sell more than 3,000 units of product in any given year.

Part of the music industry’s economic viability rests on a favourable level of local content programming by the broadcast sector, as has been adopted by other countries across the globe. The Canadian music industry is one such notable example, where the institution of a 35% local content quota since 1971 has allowed that music industry to develop and flourish alongside the highly competitive music industry of the United States. Canada is currently rated as the second largest source of music talent in the world, with its 21 leading artists having sold more than 556 million records around the world – worth more than US\$8.35 billion in retail (Applaud! 2003). Although the local radio audience size of Trinidad and Tobago cannot compare to that of Canada, the fact that most local radio stations also broadcast via the Internet indicates that is possible to attain such an audience for local content on a global scale. Broadcasting significant levels of local content via the Internet creates an opportunity for developing new audiences and in turn, increased market demand for local music. Thus, there is need for revision of the current policy on broadcasting in Trinidad and Tobago towards a more favourable stance for the music industry of Trinidad and Tobago.

### **2.1.6 Copyright Management & Administration**

For the most part, the music industry fraternity has become more knowledgeable about its rights with respect to copyright since the establishment of the Copyright Organization of Trinidad and Tobago (COTT), the prime agency responsible for the management and administration of copyright in Trinidad and Tobago.

### 2.1.6.1 Copyright Organization of Trinidad and Tobago (COTT)

Website: [www.cott.org.tt](http://www.cott.org.tt)

45C Jerningham Avenue, Belmont

Tel: 623-6101/ 7311, Fax: 623-4755

Email: [cott@cott.org.tt](mailto:cott@cott.org.tt)

Ms. Allison Demas – President

COTT is a collecting society incorporated in 1984 to represent composers, songwriters, lyricists, and music publishers. Operations began in 1985. The organization collectively licenses performing and reproduction rights in music and collects and distributes royalties to the composers, songwriters and publishers who own the copyright. COTT has over 1,000 writer and publisher members and has 63 international reciprocal agreements with similar music rights organizations around the world such as ASCAP and BMI in the United States, SOCAN in Canada, COSCAP in Barbados, the Performing Rights Society Limited (PRS) in the United Kingdom and various Commonwealth countries, SACEM in France, IPRS in India and JASRAC in Japan. Projects and initiatives include quarterly distribution of royalties, Caribbean Copyright Link (an international network of databases including musical works from COTT's repertoire and other Caribbean copyright organizations), the Annual COTT Music Awards, which honours and recognizes the contribution of COTT's members, educational seminars and workshops. Offices are located in Port of Spain, South and Tobago. Total number of employees is 20.

COTT has been able to provide some measure of safeguard to local creators of music and music publishers, and has seen its membership base expand significantly over the years. Collections for 2003 represent the largest disbursement of royalties to its members since 2000 (see Table 24). In 2003, COTT remitted approximately 54% of its income for distribution to foreign rightowners. This scenario is likely to prevail as long as local broadcasters remain committed to airing more foreign music than local music.

**TABLE 23: COTT DOMESTIC DISTRIBUTIONS, 2000 – 2003 (TT\$)**

2000	2001	2002	2003
1,075,563	1,011,135	990,583	1,300,000

**Source:** "Business Review 2000-2004", [www.cott.org.tt](http://www.cott.org.tt), 2004.

Remittances received from the rest of the world for the use of music created in Trinidad and Tobago pale significantly in contrast. In 2001, this amounted to a mere US\$34,695 (TT\$218,231) and in 2002, it increased slightly to \$39,780 (TT\$250,216) (see Table 25). These shortfalls are primarily due to the fact that the collection machinery abroad remains relatively weak, even as major recording labels are developing a keen interest in the genres from Trinidad and Tobago. One of the major problems is the fact that Trinidad and Tobago's music is generally not played in mainstream fora, which are the main targets of international collection agencies. In addition, the issuance of licenses to overseas Carnivals has been inconsistent and not sufficiently widespread. It is even more difficult to issue licenses and collect payments within the diaspora for the use of music in fete venues and other entertainment establishments outside of the annual Carnival celebrations period.



**TABLE 24: COTT'S FOREIGN COLLECTIONS, 2000 – 2003 (US\$)**

2000	2001	2002	2003
39,034	34,695	39,780	N/A

**Source:** COTT 2002 Yearbook.

With the recent establishment of the Caribbean Copyright Link (CCL) of which COTT is a member, it is anticipated that collections from international markets should improve tremendously. In essence, CCL provides data management services to its member collection agencies, and by extension to the members of the collection agencies. Through an international database programme that accurately monitor and maintain data standards for all incoming and exported information on these works, CCL is in a position, inter alia, to research unidentified works and performances in cooperation with national societies; research, export regional data to all societies worldwide and o other international data centers; and carry out royalty distribution processing operations (CCL Brochure, 2005).

Within Trinidad and Tobago, the collection mechanisms have improved tremendously - it is also noted that income from performance licenses increased between 2001 and 2002 (see Table 26). However, copyright regulations remain weakly enforced. For the most part, the protective services and prosecutors have generally not treated copyright as a high priority. This can be attributed to their lack of knowledge about intellectual property as a whole. Piracy is usually considered a low priority crime as compared to violent crimes. Magistrates still continue to view pirates as "small time hustlers trying to make a living" (Demas and Henry, 2001) and therefore tend to be very lenient on them. There are currently 50 cases before the court on infringement, none of which have been tried to date. Thus, the general legislative infrastructure remains slow and cumbersome.

**TABLE 25: COTT'S INCOME FROM PERFORMANCE LICENSING, 2001 & 2002 (TT\$)**

	2001	2002
Broadcast Licenses		
Radio	1,308,544	1,656,385
Television	1,167,176	834,489
Cable TV	-	41,659
Sub-Total	2,475,720	2,532,533
General Licenses		
Premises	1,943,527	1,943,266
Disc Jockeys	330,859	222,523
Permits	372,706	481,381
Carnival	-	468,540
Sub-Total	2,647,092	3,115,710
<b>TOTAL</b>	<b>5,122,812</b>	<b>5,648,243</b>

**Source:** COTT 2002 Yearbook.

It is therefore, not surprising that the most overriding challenge has been the steady rise of piracy and other forms of infringement. Overall, high levels of piracy and the growth in unlicensed users will continue to hinder the development of steady royalty income for local right owners. The growth of piracy has been further aided by the emergence of new microelectronics that can

be used to pirate music at speedy rates. One of the largest import items for Trinidad and Tobago is unrecorded audiotapes and recordable CDs. These have become a prominent feature since the early 1990s in the local pirate market.

In addition, most users of copyrighted music such as government institutions, universities, radio and television stations, restaurants, bars, nightclubs, and hotels remain largely unaware of, or refuse to accept their obligations under law. These difficulties of enforcement arise because there is a general lack of respect and appreciation of copyrights among users and even some retailers. For example, it is also possible to purchase pirated copies of music from some established retail outlets throughout Trinidad and Tobago, apart from the pirate carts on the streets. Such easy access precludes the need to purchase originals, and more importantly, can deter artists and producers from recording new music.

Until recently, COTT was the only existing copyright body in operation. In 2000, The Trinidad and Tobago Copyright Collection Organization (TTCO) was incorporated as a non-profit organization with the mandate to “protect the rights of its members by licensing and paying royalties for the public performances of their copyrighted works and through consultation with other bodies and authorities enforce and prosecute Piracy at all levels” (TTCO Brochure n.d.).

#### **2.1.6.2 Trinidad and Tobago Copyright Collections Organization (TTCO)**

Tel/ Fax: 624-1024

Email: [ttco@yahoo.com](mailto:ttco@yahoo.com)

Ms. Agnes Ragubarsingh - Secretary

The Trinidad and Tobago Copyright Collections Organization (TTCO) was initiated by members of the National Chutney Foundation of Trinidad and Tobago and was incorporated as a non-profit organization in 2000. The organization was officially launched by the then Attorney General and Ministry of Legal Affairs of the Republic of Trinidad and Tobago. TTCO represents all aspects of the Music industry, including Authors, Composers, Publishers, Performing Rights, Mechanical Rights, Neighbouring Rights,

TTCO is a collecting Organization in all areas of Copyright and also disperses Royalty payments to its members at least twice per year. It has filled a gap in the copyright/ intellectual propriety management, by specializing in performing rights and mechanical rights. The organization also protects developers of Computer Software and Tri-digital Commerce. TTCO is recognized by the World Intellectual Property Organization (WIPO).

TTCO represents all kinds of music, including drumology and numerous genres of East Indian music and cultural traditions. Unlike COTT, TTCO offers representation to performers and singers. In this regard, the organization has recently embarked on an initiative to track overseas Carnivals from 2005 to issue licenses and collect royalties on behalf of its members including singers and performers.

Presently, the establishment of TTCO is viewed by many within the industry as a rival Organization to COTT. As a result, most right owners in the genres of calypso, soca and rapso have remained committed to COTT, while many within the East Indian genres have joined the

TTCO. The rival between the two Organizations has also created some measure of uncertainty around the difference in roles of the Organization. In spite of the emerging divisions, it is not clear at this time whether rivalry has hampered either Organization's ability to effectively manage and administer on behalf of its respective members. It would appear that both Organizations have particular core competences and should perhaps attempt to pool these competences where necessary for the further development of the music industry as a whole.

### **2.1.7 Institutional Framework for the Music Industry**

There are several public and private institutions that have played a significant role in the development of the entertainment industry of Trinidad and Tobago and continue to have an impact on its growth. This report, however, does not include a description of the contribution of private/ individual stakeholders due to the volume of research that would have been required to include this aspect coupled with the time and human resource limitations associated with this project. These private/ individual stakeholders should however be invited to submit profiles on their contribution and involvement for inclusion in this database towards the preparation of an updated entertainment directory. The descriptions of the public institutions as well as the main projects and contact information are provided below.

#### **2.1.7.1 Ministry of Community Development, Culture and Gender Affairs**

ALGICO Building, Jerningham Avenue, Belmont

Tel: 625-3012/ 625-3112, Fax: 625-3278

Email: [cdcga@tstt.net.tt](mailto:cdcga@tstt.net.tt)

Ms. Hermia Tyson-Cuffie – Ag. Permanent Secretary

The Ministry of Community Development, Culture and Gender Affairs represents the main institution responsible for the development of the music industry in Trinidad and Tobago. Training and human resource development is facilitated through the provision of eight-week training courses. The relevant course material, along with stationary and refreshments are also provided. Programmes are offered in the following areas:

- Drumming;
- Traditional Indian Wedding Songs - This course is offered in two venues – Sangre Grande and Felicity with an enrollment of 30 and 26 persons respectively. There are no age restrictions to entering the programme. The programme is 80% practical. The programme is designed in such a manner that it includes introductory elements straight up to advanced, such that graduates of the programme will be qualified as teachers in the field upon completion. Graduates will also be able to gain employment at traditional Indian weddings. Upon successful completion of the programme persons are awarded a certificate.
- Pan – Short courses are offered in music literacy, arranging, pan technology, pan construction, screen-printing, pan sinking, pan tuning, and welding. These courses run once a year for twelve weeks with 36 contact hours. In addition, a pilot project is now being run geared towards children without opportunities between the ages of 13 – 17

years of age. These pan camps are offered in twelve pan yards including one in Tobago. The children are provided with two meals a day, uniforms and pan sticks, and are shuttled via maxi taxi from their communities to the pan yards. The objective of this programme is to train approximately 300 new panmen in various targeted communities (Laventille, “In-back-o-there” San Fernando among others), who will then assist with the development of the pan orchestras in their communities in the long term. This programme was not advertised; instead, an Administrator was hired for each community, who selected candidates based on financial and social status. Each venue has an enrollment of approximately 25 persons. The members of the National Steel Orchestra are used as the tutors for the camps with two being assigned to each camp. The fact that the tutors themselves are in their early twenties allows for closer relationships with the children. At the end of the programme, there will be concerts held in each of the communities, as well as one major event with the coming together of all the graduates for the largest steel orchestra ever playing in Trinidad and Tobago. The programme is expected to have a significant impact on employment and revenue generation in the short term from salaries paid to the tutors, Administrators, and Secretaries who are hired from each pan yard to ensure the affairs of the pan yards are being considered in the programme, catering, transportation, rental of chairs and tables, stationary and supplies. The pan camps also have a developmental aspect as the pan yards are given a grant for upgrade and maintenance of the facilities.

In addition to these programmes, the Ministry also implements its projects through its statutory bodies and other agencies:

- The Carnival Institute;
- Naparima Bowl;
- National Carnival Commission of Trinidad and Tobago (NCC);
  - National Carnival Bands Association of Trinidad and Tobago (NCBA);
  - PanTrinbago;
  - Trinbago Unified Calypsonians Organization (TUCO);
- National Museum and Art Gallery;
- National School of Music;
- Queens Hall Board; and
- Trinidad and Tobago National Steel Orchestra.

Those specifically related to the Carnival industry will be described under Section 3.1 - Analysis of the Music Industry – Industrial Structure and Context.

### **2.1.7.2 PanTrinbago**

Website: [www.pantrinbago.co.tt](http://www.pantrinbago.co.tt)

Suite 1D, Victoria Suites, Victoria Square North, Port of Spain

Tel: 623 – 6715 / 623 – 4486, Fax: 625 6715

Email: [admin@pantrinbago.co.tt](mailto:admin@pantrinbago.co.tt)

PanTrinbago Inc. is a non-profit union under the NCC, which was incorporated in 1986 to facilitate the promotion and development of the steelpan and pannists worldwide. It currently represents over 100 bands. PanTrinbago organizes Panaroma, which is a Steelband competition held each year since 1963 and also assists with the organization of the World Steelband Music Festival which was first staged in 1988. This event was held in New York in June this year. In addition, PanTrinbago hosts a National Steelband Music Festival each year alternating between the school bands and senior bands on a biennial basis. Other projects include Steelband Week, which is celebrated annually during the last week in August to commemorate the declaration on the Steelpan as the National Instrument of Trinidad and Tobago. PanTrinbago consults with the Ministry of Community Development, Culture and Gender Affairs on issues such as assistance to unsponsored bands, assistance for National Festivals as well as foreign tours. The organization also assists with public awareness by having conferences such as the one held in July 2005 “Forging A New Beginning... Playing A New Song”, which sought to highlight the organization’s challenges in the global marketplace, its marketing strategies and future plans.

### **2.1.7.3 Trinbago Unified Calypsonians Organization (TUCO)**

Website: [www.tuco.co.tt](http://www.tuco.co.tt)

Business Unit Office, #22 Jerningham Avenue, Belmont, Port-of-Spain,

Tel/ Fax: 623-9660

Tel: 627-5804/ 5912/ 8826

Email: [worldcalypso@hotmail.com](mailto:worldcalypso@hotmail.com)

Michael Legerton - President

The Trinbago Unified Calypsonians Organization was established in 1992 when members of the Calypsonians Association of Trinidad and Tobago joined together as the representative body for calypsonians. The organization became incorporated by Act 33 of 1998. TUCO is an agency under the NCC and receives an annual Government subvention to assist with financing. TUCO has 14 full time clerical employees. The functions of TUCO include the following:

- To promote, enhance, research and advance in all aspects in the art of Calypso;
- To carry out all or any of the business connected with the entertainment industry to the benefit of the organization’s members;
- To hold or promote competitions of any description which may be calculated to increase the business of the organization;
- To promote or advertise any publication issued by the organization or in which it is interested;
- To work in close collaboration with the NCC or any other body regionally or internationally which would enhance the organization’s aims and objectives.

The organization recently had an institutional strengthening and strategic planning exercise conducted by Armstrong and Associates. A subsidiary company has been recently formed to exploit the Cricket World Cup 2007 ad beyond – the World Cup Calypso Company. A Business Unit has also been established within TUCO to cater for all business opportunities and commercial ventures – the first project involved the production of a magazine called “KAISO”. TUCO has also collaborated with the Ministry of Community Development, Culture and Gender Affairs for a series of developmental courses for its members under the programme called “The Entrepreneurial Training Initiative for Cultural Practitioners.” In April 2005, fifteen members graduated as Event Management Practitioners from the Event Management Class 2004. Some of the projects undertaken by TUCO during Carnival include:

- Calypso Fiesta;
- Extempo/ Limbo/ Categories Finals;
- Junior Calypso Monarch;
- Road March Competition;
- Tobago Monarch;
- Tobago Winward Monarch;
- Tobago Calypso Queen as well as the following Calypso Tents:
  - North Zone
    - Kaiso House;
    - Klassic Ruso opened in January 2004 at the Mas Camp Pub;
    - Unique Calypso Theatre;
  - South Zone
    - Kaiso Showcase;
    - Birds Calypso Tent;
    - Rainbow Calypso Tent;
  - East Zone
    - Kaiso Caravan;
  - Tobago Zone
    - Power Stars;
    - Eastern Stars; and
    - Rapso Explosion

In addition, TUCO organizes the following activities outside of the Carnival period:

- Calypso History Month;
- Annual Magazine publication;
- Educational Courses:
  - Events Management;
  - Marketing;
  - Protocol; and
- Workshops;

#### **2.1.7.4 Trinidad and Tobago National Steel Orchestra**

Mr. Auburn Wiltshire – Steelbands Development Officer D: 627-7812

The Trinidad and Tobago National Steel Orchestra is fully paid for by the Ministry of Community Development, Culture and Gender Affairs. There are thirty persons in the Orchestra, all above eighteen years of age. These persons are supposed to be retained for a period of two years and rotated. Wages range from TT\$3,500 for a Musician I, to TT\$4,200 for a Musician II to TT\$5,200 for a Leader/ Arranger. Members of the Orchestra receive training on an on-going basis. Members recently concluded an Associate Degree programme facilitated by COSTAATT, and the training is now being put to the test in the Pan Camp training programme of the Ministry. The orchestra also performs at state functions and acts as cultural ambassadors in foreign countries.

#### **2.1.7.5 Ministry of Education**

18 Alexandra Street, St. Clair

Tel: 622 – 2181, Fax: 622 – 4892

Email: [mined@tstt.net.tt](mailto:mined@tstt.net.tt)

One of the projects of the Ministry of Education that is specifically related to the music industry is its Pan in the Classroom programme. This programme was initiated in 2001 for primary and secondary schools with an objective of implementing music programmes in all schools using steelpan as the preferred instrument of choice. More than 110 primary and secondary schools are involved in the programme. Facilitators of the programme, work on a full time basis. Tutors go to various schools and instruct teachers how to teach pan to students. As part of the programme, over the last four years pan has been placed as rentals in schools and a sixteen-piece orchestra has been placed in several secondary schools.

The programme is presently in phase two, whereby the Government of Trinidad and Tobago is in the process of purchasing steelpanns to replace those that were previously rented. Pan in the Classroom is examinable at the Caribbean Examinations Council level. The curriculum consists of the Music Listening Component, Performance Component and the Appreciation Component. Students are exposed to the steelpan one and a half hours per week per class. The Unit responsible for the Pan in the Classroom programme successfully hosted the National Junior Panorama in 2005. Over the last four years it has staged Teacher's Workshops and Camps in every educational district including Tobago. Currently the Ministry of Education in collaboration with PanTrinbago and the Pan in Schools Coordinating Council are overseeing the Music Festival for Schools, which will be held in September 2005.

### **2.1.7.6 Ministry of Public Administration and Information - Telecommunications Authority of Trinidad and Tobago (TATT)**

Website: [www.tatt.org.tt](http://www.tatt.org.tt)

Suites 3-5, BEN Court, 76 Boundary Road, San Juan

Tel: 675-8288, Fax: 674 -1055

Email: [info@tatt.org.tt](mailto:info@tatt.org.tt)

Dr. John Prince – Executive Director

The Telecommunications Authority was established as an independent body under the Ministry of Public Administration and Information. It was established under the Telecommunications Act 2001 for the regulation of telecommunications and broadcasting sectors in Trinidad and Tobago. It began operations in July 2004. The organization's responsibilities include:

- Granting licenses and making recommendations to the Minister for granting concessions;
- Establishing national telecommunications and broadcasting industry standards;
- Planning, supervising, regulating and managing the use of the radio frequency spectrum;
- The license and registration of radio frequencies and call signs to be used by all stations operating in Trinidad and Tobago or on any ship, aircraft, or other vessel or satellite registered in Trinidad and Tobago;
- The allocation, assignment and reallocation or reassignment of frequency bands where necessary;
- Testing and certifying telecommunications and broadcasting equipment to ensure compliance with (i) international standards (ii) environmental health and safety standards, including electromagnetic radiation and emissions.

### **2.1.7.7 Ministry of Science, Technology and Tertiary Education (MSTTE) - The College of Science, Technology and Applied Arts of Trinidad and Tobago (COSTAATT)**

Tel: 623 – 4608

Email: [info@costaatt.edu.tt](mailto:info@costaatt.edu.tt)

The College of Science, Technology and Applied Arts of Trinidad and Tobago of The University of Trinidad and Tobago (UTT) offers the following programs relevant to the music industry:

- Associate in Arts Degree in Performing Arts: Music, which is offered at the Trincity Campus as a three-year part time program. Students may major in music performance in areas such as steel pan, voice, guitar, brass, reed, classical piano, music education, recording techniques and studio operations. The entry requirements for this programme are 5 O' Levels including Music or recognized music diploma or certificate;
- Associate in Applied Science Degree in Visual Communication Design, which is offered as a two-year full time or three-year part time program at the John S. Donaldson Technical Institute. The entry requirements for this programme are 5 O' Levels including Math & English and a portfolio submission.



### **2.1.7.8 Centre for Creative and Festival Arts, Faculty of Humanities and Education, U.W.I.**

Website: <http://www.festival.uwi.tt>

The University of the West Indies, St. Augustine

Tel: 663 – 2222, Fax: 663-9684

Email: [festival@tsstt.net.tt](mailto:festival@tsstt.net.tt)

Rawle Gibbons – Director

Education and Training, Performance Space

The Centre for Creative and Festival Arts is a regional institution established in 1986 to serve the needs of the Eastern Caribbean for tertiary level training in the arts. The Centre is also mandated to assist in researching, analyzing, recording and disseminating the history and cultures of the Region. There are approximately thirty (30) part-time staff and eleven (11) full time staff.

The Centre is involved in training at various levels. Certificate programmes are offered in the Music (Pan), as well as undergraduate majors (Bachelor of Arts B.A.) in the Musical Arts (Special) – The entry requirements include two GCE A' level passes and Grade 7 in Music for the Special in Music, an audition as well as a B+ average in the certificate in Music (Pan) to enter Year II of the BA programme. The major includes one-semester attachments in the industry.

### **2.1.7.9 National Chutney Foundation of Trinidad and Tobago**

Tel: 624-1024/ 628-2174

Vijay Ramlal [chutneyfoundation@yahoo.com](mailto:chutneyfoundation@yahoo.com)

Ms. Agnes Ragubarsingh [cftt@hotmail.com](mailto:cftt@hotmail.com)

This organization began operations in 1994 and was officially incorporated through an Act of Parliament (Act No. 6 of 2000) with the aim of promoting, enhancing and researching all aspects of the Chutney art form and its presentation to the world through all available media and entertainment forms. The organization also has responsibility for the activities of the now defunct Chutney Soca Organization of Trinidad & Tobago (CSOTT) and Chutney Soca Artistes of Trinidad & Tobago, which were both incorporated into the Foundation. Some of the initiatives include the National Chutney Monarch Competition of Trinidad and Tobago, the Junior Chutney Monarch of Trinidad and Tobago for schools and the National Chutney Calypso Touring Tent of Trinidad and Tobago. The organization receives financial assistance from the Government towards the prizes for various competitions hosted.

### **2.1.7.10 National Tassa Association of Trinidad and Tobago**

Tel: 624 - 1024

Email: [tassa\\_association@yahoo.com](mailto:tassa_association@yahoo.com)

Vijay Ramlal

The majority of Tassa bands in Trinidad and Tobago including all the major bands established the Tassa Association of Trinidad and Tobago. This association has been staging the official National Tassa Competition for Bands since 2001. The Association is currently seeking to have the Tassa instrument declared as the Second National Instrument and continues to work with the Ministry of Community Development, Culture and Gender Affairs as well as other relevant

organizations on a continuous basis to keep the development progressive. There are over 300 brass bands in Trinidad and Tobago based on 2005 estimates.

#### **2.1.7.11 Orchestral Society of Trinidad and Tobago (OST&T)**

Tel: 663-2113

Suzette Julien/ Roger Julien

Email: [suztud@hotmail.com](mailto:suztud@hotmail.com), [sjulien@cariblink.net](mailto:sjulien@cariblink.net)

The Orchestral Society of Trinidad and Tobago was registered as a non-profit organization in March 2004 with the stated business being the management of symphonic orchestras. It is the organization that is responsible for the National Symphonia and is directed by Jessel Murray. The Orchestra consists mostly of youths from 13 to 18. Musicians are drawn from other music organizations and music schools nationwide. The orchestra consists of 45 dedicated musicians, who are accomplished players of orchestral instruments such as violins, cellos, violas, French horns, flutes, oboes, clarinets, trumpets and percussion. The main challenge for the orchestra is locating a permanent home, and funding. Revenues are currently derived from performances, workshop fees and corporate sponsorship.

The Orchestral Society consists of a board of seven members. Its mandate is to develop orchestras that play classical music across the country. The Society has the following goals and objectives among others:

- To expand cultural understanding and appreciation through national and international exchanges and travel;
- To be a source of music information and expertise to the public;
- To establish a music library;
- To stimulate and assist schools in developing instrumental programmes; To supply expertise and staff to achieve these ends.

One of its initiatives is a Music Workshop that is held every year during the August vacation. Tutors from the United States assist players in improving their technical skills at this workshop. At the end of the workshop a major performance is held at Queen's Hall. Some of the past initiatives include the closing of the last Music Festival, the Inauguration of the President of the Caribbean Union College, fundraiser events and a musical collaboration with the Marionette Chorale. The National Sinfonia has also been commissioned to open the next Music Festival in 2006.

#### **2.1.7.12 Rapso Movement of Trinidad and Tobago**

[www.brotherresistance.com](http://www.brotherresistance.com) / [www.rapsofest.com](http://www.rapsofest.com)

Mr. Lutalo Masimba

C/o Trinbago Unified Calypsonian Organization (TUCO), Grand Stand, Queen's Park Savannah, Port of Spain

Tel: 620 – 2966

Email: [brother\\_resistance@hotmail.com](mailto:brother_resistance@hotmail.com)

Network Community Organization

### **2.1.7.13 Recording Industry Association of Trinidad and Tobago (RIATT)**

Mr. Kenny Phillips – President

Mr. Robin Foster - Vice President

1 Taylor Street, Woodbrook

W: 628 – 7305/ 2629 Fax: 622 – 6521

Email: [fosproductions@visualart-tt.com](mailto:fosproductions@visualart-tt.com)

### **2.1.7.14 Trinidad and Tobago Publishers and Broadcasters Association (TTPBA)**

c/o WABC 103 FM, Level 4 Long Circular Mall, St. James

Yaseen Rahaman - President, Tel: 628 – 9222, Fax: 628 – 0660

Email: [103fm@tsstt.net.tt](mailto:103fm@tsstt.net.tt)

Fazilette Macintyre – Secretary, Tel: 688 – 7412, Fax: 676 – 3089

Email: [fazilettem@yahoo.com](mailto:fazilettem@yahoo.com)

The Trinidad and Tobago Publishers and Broadcasters Association (TTPBA) was established in the early 1990's with the granting of Presidential licences to potential radio broadcasters to own and operate radio stations. Incorporated in October 2003, the TTPBA is a non-profit organization that is funded by its members in the form of membership dues. The Association currently represents 80% of the media companies (press, radio, television and cable) in Trinidad and Tobago.

Its objectives are:

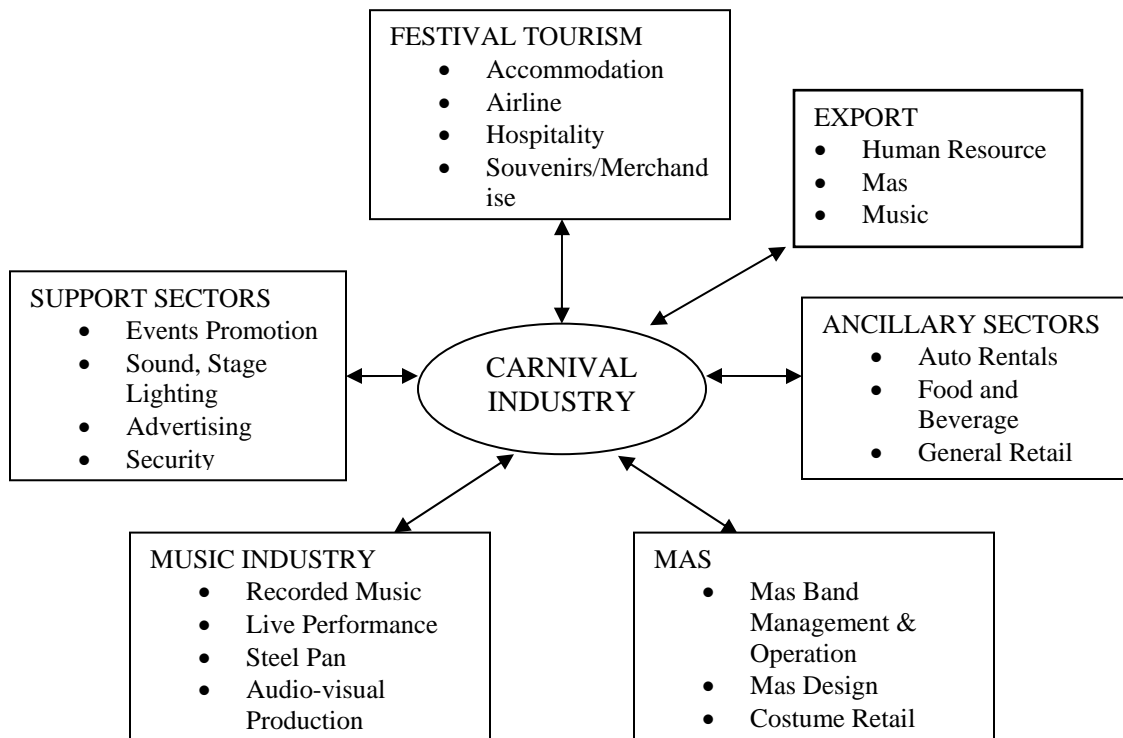
- To protect and preserve the right of the people to know;
- To encourage practices that will strengthen and maintain the broadcast and publishing industry by improving industry standards through education and acknowledgment of organizations and individuals who have contributed significantly to the industry;
- To communicate with Governmental and other agencies with regard to the creation of a legal framework and regulations; and
- To encourage an exchange of information among members that will assist the association in making decisions that affect the broadcast and publishing industry.

The TTPBA has contributed towards the development of the Code of Practice ratified by the Media Complaints Council (MCC) and actively supports and participates in its advertising campaigns to increase public awareness of its role. Current issues being addressed include the Broadcast Code and all other telecommunications matters with the TATT, market research through working with Market Facts and Opinions as well as training and development. The TTPBA plans to hold training seminars to improve the competence and quality of work among media practitioners. The Association is represented on the Media Sector Committee of the Chamber, as well as the committee to formulate policy on cable and video piracy under the Ministry of Legal Affairs. In 2004 the TTBA introduced its Annual Awards for Excellence in Media to recognize those who have made a significant contribution to the industry.

## 2.2 Analysis of the Carnival Industry – Industrial Structure and Context

The carnival industry comprises six broad areas of economic activity, most of which are identifiable industries within the economy (see Figure 6). Across the board, these industries have derived significant returns from carnival, and have in turn provided a range of products and services that are critical to the successful operation of carnival every year. These synergies have propelled the development of carnival to becoming one of the premier festivals of the Caribbean, as well as a yearlong industrial activity. This has translated into significant economic spin-offs in the local economy.

**FIGURE 6: STRUCTURE OF THE CARNIVAL INDUSTRY**



### 2.2.1 Mas

The masquerade band has become an important generator of economic and commercial activity within the carnivalscape. Most notably, the mas band plays a critical role in providing employment to workers who are usually unemployed or self-employed during the Carnival off-season. It is difficult to provide an accurate number of those employed within the masquerade sector without a detailed census, given the varying levels of complexity across the various sized bands. Employment can range from 5 – 15 persons per mas camp site and a band can have from 2 to as many as 20 mas camp sites depending on the size of the band and the chosen theme for the year.

Employment opportunities, particularly for mas designers, wire benders, copper workers, mouldes and band management also extend into the diasporic Caribbean Carnivals in Miami, St. Vincent and the Grenadines, Jamaica and Barbados for which mas bands such as Poison, Harts, and the former Legends create and produce costumes. The export of such high-end skills in

essence represents a unique core competence as these skills are generally only accessed from Trinidad and Tobago, while basic skilled workers such as decorators and seamstresses are usually hired within the diasporic market. This external market has allowed some local mas designers to make carnival their fulltime occupation, since it is possible for a mas band to have branches in as many as five cities hosting Caribbean-style carnivals.

Production costs of a masquerade band vary according to its size and grandeur. Using the categorization of size, production costs for a small-sized band can amount to TT\$40,000, while a large-sized band’s production expenses can run as high as TT\$3 million (see Table 27). For the average mas band, production expenses can include: hiring of designer(s); costumes designs; building costumes prototypes for each section; rental of mas camp space; employment of operational staff; costume materials; marketing and advertising which may include a web-site; hospitality including band launch; and the expenses associated with the two days on the road including DJs and sound systems, music trucks, and security.

**TABLE 26: ESTIMATED PRODUCTION COSTS OF MAS BANDS ACCORDING TO SIZE**

	<b>No. of Masqueraders</b>	<b>Production Costs (TT\$)</b>
Small Mas Band	50 – 150	35,000 – 65,000
Medium Mas Band	151 – 700	65,000 – 210,000
Large Mas Band	701 - 3,000	210,000 – 900,000
Super-sized Band*	3,001 – 10,000+	900,000 – 3,000,000

\*This category has recently emerged in the last 5 years and comprises only about three bands. These bands are mainly made up of all-inclusive sections.

**Source:** Interview with Carnival Industry Operator, 2005.

One of the more striking features to emerge in the production and operation of mas bands has been the use of franchise contracts to divest sections of the band to private individuals or groups, who would independently produce, package, market and sell the costumes of the section. This strategy is most prevalent among large and super-sized bands, as a means of lessening the financial and operational burden of producing the mas band, while at the same time giving room for market expansion and increased revenues each year. The franchiser’s responsibility is mainly operations management on the road for the two days, and maintaining the overall image of the band. The fanchisee is in turn responsible for all aspects of production including the costume design based on the overall theme identified by band management; providing a complete all-inclusive package; as well as marketing and securing sponsorship for the specific section. This growth strategy has become a rather lucrative source of income for the super-sized band, since as many as 30 sections may be divested at an annual fee of TT\$40,000 to TT\$60,000, the estimated cost of producing a small band.

Thus, it would appear that the returns are mainly reaped by the large and super-sized mas bands<sup>38</sup>. These bands mainly offer “pretty mas”, which is currently the leading trend in the masquerade market. It has been noted that those bands that have been able to achieve significant financial success each year have provided their owners and managers full-time employment

---

<sup>38</sup> Carnival industry sources were not willing to divulge revenue figures, therefore these could not be included in the Report.

throughout the year. This has allowed these bands to embark on export initiatives in the diasporic Carnivals, that can even include managing and operating a mas band in collaboration with a band leader based in the diasporic market. Large profit margins for these bands may be derived from the low reproduction costs of the costume; the ability to capture sizeable corporate sponsorship; strong buying power in the supply markets both locally and abroad; the divestment of sections at premium fees; and the sale of costumes at premium costs.

While some bands are able to acquire corporate sponsorship, whether in cash, in kind and/or in the form of product supply, sizeable monetary sponsorship is difficult for the majority of mas bands to acquire. This may be in part due to the fact that a major criterion for landing a major sponsorship deal is the band's ability to capture a large share of the market that has the disposable income to spend on the products and services sold by the potential sponsor. In this regard, large and super-sized pretty mas bands, particularly those comprising "all-inclusive" sections, are usually targeted by corporate sponsors.

In comparison, more traditional mas bands tend not to earn lucrative profit margins. It would appear that the market for traditional mas has gradually moved to a more mature market, who would have played traditional mas for most of their carnival experience. It is clear that as pretty mas continues to be marketed aggressively and is highlighted more by the media, traditional mas appears to be losing its market appeal. Rising above this challenge becomes increasingly difficult as many of these bands lack the logistical and operational skills as well as the marketing and strategic competences that are now so critical in the mas business.

Correcting this imbalance must be of critical concern since traditional mas represents an important aspect of Trinidad and Tobago's culture and heritage, and more importantly, forms the backbone of carnival arts. Should traditional mas die, Trinidad and Tobago would lose an invaluable training ground for designers, wire benders, and decorators, as well as the opportunity to diversify its mas export beyond the pretty mas market. Traditional mas offers export opportunities in terms of local artisans providing training to key stakeholders in newly emerging carnivals as well as to schools and community groups, situated in the cities of the emerging carnivals. Research shows that many Caribbean-style carnivals, particularly those in Europe, use traditional mas as the basis of teaching carnival arts in schools and colleges. In addition, carnival arts is increasingly expanding as a research area where Caribbean style carnivals exist. For example, some community colleges in the UK are actively developing carnival studies programmes that incorporate traditional mas design and practice as part of their curricula. There is therefore opportunity to diversify into training and edutainment and create unique niche markets abroad that are based on local indigenous arts, which can do much to reaffirm the importance significance of traditional mas to the carnival industry. Thus, efforts should be made to encourage the development of linkages between the local mas fraternity and relevant stakeholders in overseas carnivals in order to exploit such opportunities.

### **2.2.2 Carnival and the Music industry**

Carnival is most inextricably linked to the music sector in that music drives the energy of carnival each year, and in turn creates market opportunities for artists. The era of calypso saw calypsonians such as The Mighty Sparrow and Lord Kitchener achieve export success, particularly as Caribbean-style Carnivals began to emerge in the 1960s among the diasporic

communities. Calypsonians were also able to maintain strong domestic market appeal, mainly through the carnival tents which tended to attract demographically mixed audiences. The advent of soca saw the emergence of artists such as David Rudder, Brother Resistance, Nigel and Marvin Lewis, and Machel Montano who became the “stars of Carnival”, having similarly tapped into the market exposure generated by carnival locally and abroad. This has led to the signing of some soca songs by international labels that have achieved international acclaim, notably: “Who Let the Dogs Out”, written by Anselm Douglas (Platinum); “Follow De Leader” written by Nigel Lewis (Silver); “Sweet Soca Music” written by Stafford Samuel (Gold).

Carnival continues to provide an important medium of exposure for various areas of the music industry, and as such, has created an important income source and a number of economic spin-offs within the music industry<sup>39</sup>. This is particularly the case in relation to:

- Recorded music, viz. calypso, soca and chutney-soca: Carnival serves as the primary reason for the production of music in these genres both from a creative and marketing standpoint. For many artists in these genres carnival is the main avenue for exposure, amidst low product sales and high levels of piracy.
- Live performances, particularly in the above-named genres: The calypso tent remains an important medium of exposure for traditional calypso, however, the carnival fete is increasingly becoming the most popular Carnival past-time and is the main medium of exposure for performing artists in the carnivalscape. This provides a platform for artist exposure to an expanding clientele that encompasses a significant number of visitors of varying interests including investors. While the carnival fete fulfills an important role, much should be done to rebuild market demand for the calypso tent. As the centre of a traditional musical artform, the calypso tent can be used as the structure for touring calypsonians and artists to new potential markets.
- Steelpan, both as merchandise and live performance: It is estimated that some 8,000 pannists are active during the Carnival season, and that the “composite Pan-Carnival industry” generates over TT\$250 million in foreign earnings annually<sup>40</sup>. It is estimated that government collects over TT\$25 million in taxes annually from “related economic activities”<sup>41</sup>.
- Audio-visual production, primarily in the form of merchandise: there is a growing market among visitors for the sale of DVDs showcasing the parade of the bands as well as some of the premier Carnival events.

The level of economic activity generated by carnival within these sectors illustrates that the music industry has largely emerged as a product of Carnival (Nurse, 2004). The continued growth of these sectors during Carnival illustrates the point that these sectors have the potential to increase foreign exchange earnings, generate employment and enhance the tourism product,

---

<sup>39</sup> For further elaboration, refer to Section Two of this report “Situational Analysis of Trinidad and Tobago Music Industry”, p. 10 -26.

<sup>40</sup> Pan Foundation Board (2004) “Strategic Plan for Pan”, p.5.

<sup>41</sup> Ibid.

using the Carnival as a platform. Therefore, the linkages between the music industry and Carnival must be extensively explored and exploited to the fullest.

### 2.2.3 Support Services and Ancillary Sectors

A critical ingredient in strengthening the domestic platform and export potential of an industry is to encourage sectoral clusters that will foster further growth within a particular industry and within the sectors that directly or indirectly benefit from the target industry (Porter 1998). Carnival serves as a catalyst for a range of activities in the local economy that has led to clustering of some sectors.

As shown previously in Figure 6, these sectors can be characterized either as a cluster of support sectors (i.e. those sectors providing products and services that directly contribute to the operation of Carnival and as such directly benefit from carnival), or a cluster of ancillary sectors (i.e. those sectors providing products and services that are complementary to carnival and as such indirectly gain from the operation of carnival each year). Thus support sectors in the carnival industry would include:

- Sectors within the wider entertainment industry – broadcasting, event promotions, sound, stage and lighting, film and video production, commercial theatre and dance, visual arts, craft, and collective management;
- Image and make-up consulting;
- Marketing and advertising;
- Security management;
- Venue operations;
- Tour operators;
- Telecommunications; and,
- Transport.

Related sectors would include:

- Car rental agencies;
- Food and beverage;
- Hospitality sector, including airline sector;
- Clothing and accessories retail;
- Supermarket industry;
- Bottled water industry;
- Personal beauty care; and,
- Health and fitness clubs.

Research shows that during the carnival period, these sectors experience increased sales and revenue. For example, all car rental agencies and accommodation establishments are usually fully booked out during the period, at which time they operate on premium season rates (see Tables 28 and 29). The average car rental agency with a fleet of 500 cars, is likely to earn at minimum TT\$937,500 from rentals over the Carnival weekend<sup>42</sup>. Employment opportunities

---

<sup>42</sup> In the instance, the Carnival weekend is counted as Carnival Friday to Ash Wednesday.



may also arise, although only temporarily as some sectors hire additional staff specifically to cope with additional business during the period. Apart from this, firms and entrepreneurs operating in these sectors may experience expanded market share as a result of the heightened activity of the festival period. An interesting case is the bottled water industry, a related sector, whose demand increased considerably during carnival and with appropriate marketing has been able to maintain a foothold in the market. The possibilities for market expansion in these sectors are therefore unlimited.

**TABLE 27: CAR RENTAL DAILY RATES: CARNIVAL PERIOD AND OFF-SEASON**

Vehicle Type	Off Season Rate Range (TT\$)	Carnival Season Rate Range (TT\$)
Compact (Accent)	\$375 - \$420	\$437 - \$483
Midsize (Corolla, Elantra)	\$437 - \$540	\$471 - \$621
Large (Almera, SUVs)	\$471 - \$600	\$506 - \$621

**Sources:** Telephone interviews with local car rental agents, January 2005.

**TABLE 28: DAILY STANDARD ACCOMMODTION RATES: CARNIVAL PERIOD AND OFF-SEASON**

Type of Accommodation	Off Season Rate Range (TT\$)	Carnival Season Rate Range (TT\$)
Bed and Breakfast (up to 40 rooms)	\$210 - \$280	\$300 - \$450
Small Hotel (41 – 100 rooms)	\$540 – \$1,044	\$1,200 - \$1,500
Medium-sized Hotel (101 – 200 rooms)	\$1,020 – \$1,500	\$1,800 – \$2,400
Large Hotel (over 200 rooms)	\$2,180 - \$2,400	\$2,700 - \$3,000

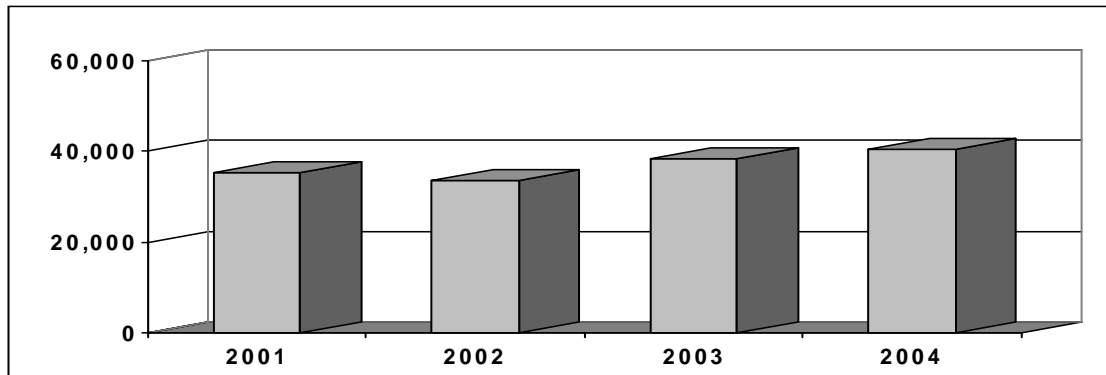
**Sources:** Telephone interviews with accommodation agents, January 2005.

#### 2.2.4 Festival Tourism

Over the last decade, carnival has accelerated the growth of tourism in Trinidad and Tobago, thus creating the niche tourism sector of festival tourism. Festival tourism is one of the more innovative forms of tourism that allows a country to pursue niche marketing to target the global market in a more strategic and incisive way. In comparison to the more traditional tourism product of sand, sea, and sun, it has been found that festival tourism is more likely to consistently attract visitors who: are willing to stay longer in the destination; are more inclined to spend directly in the local economy; are likely to make repeat visits to the destination; and are usually effective word-of-mouth promoters of the destination.

Recent data on carnival shows that the festival fulfills many of these objectives. Carnival continues to expand the demand for destination Trinidad and Tobago as evidenced by steady increase of visitor arrivals to Trinidad and Tobago during the season for the period 2001 – 2004 (see Figure 7). For Carnival 2002, visitor arrivals dropped slightly to 33,487, which may be attributed to the 9/11 disaster. However, in 2003, visitor arrivals rose again to 38,537 and again in 2004 to 40,455.

**FIGURE 7: VISITOR ARRIVALS FOR CARNIVAL PERIOD, 2001 – 2004**



**Source:** Central Statistical Office (2004) “Carnival Report 2004”.

Statistics show that approximately 18% of 2004 carnival visitors were repeat visitors, who did not have familial ties in Trinidad and Tobago (see Table 30). Of this group, visitors from Germany represented a significant share (66.7%), followed by Other Europe (38.2%) and the UK (25%). This is an important trend to capitalize upon, since Germany can be used as a gateway to tap other potential markets in Europe. It is felt that this significant share of German visitors can be in part attributed to the Trinidad and Tobago’s presence at annual tourism trade shows held in Germany. This promotion can therefore be used to aggressively target other European markets also present at these trade fairs.

**TABLE 29: REPEAT AND FIRST TIME VISITORS TO CARNIVAL 2004 BY COUNTRY OF RESIDENCE**

Country of Residence	Repeat Visitors	First Time Visitors
Caricom	20.2	71.1
Other English Caribbean	10.0	63.3
Other Caribbean	12.5	75.0
Belize, Haiti, Suriname	0.0	100.0
Central and South America	20.0	80.0
Canada	17.5	30.0
United States of America	15.1	23.5
United Kingdom	25.0	34.3
Germany	66.7	33.3
Other Europe	38.2	38.2
Rest of the World	33.3	40.0
TOTAL	17.8	35.1

**Source:** Central Statistical Office (2004) “Carnival Report 2004”.

Repeat visitors from CARICOM states accounted for 20% of this group, as compared to the 71.1% of first time visitors from CARICOM (see Table 30). These statistics seems to suggest that while Trinidad and Tobago is successful at attracting regional tourists to the Carnival for the first time, it has not been able to pull a significant number to return for the festival. Overall, regional visitors represented just over 15% of total visitors for 2004 Carnival (Nurse 2004). While this percentage share pales in comparison to the portion of extra-regional visitors (71%), regional tourism for carnival has the potential to grow given that: the Trinidad carnival is

currently one of the primary trendy “things to do” in the region; the proximity of this market to Trinidad and Tobago, their ability to travel to Trinidad and Tobago with ease; and their increasing disposable income. Marketing of carnival in the region must therefore become more incisive to take advantage of these market conditions.

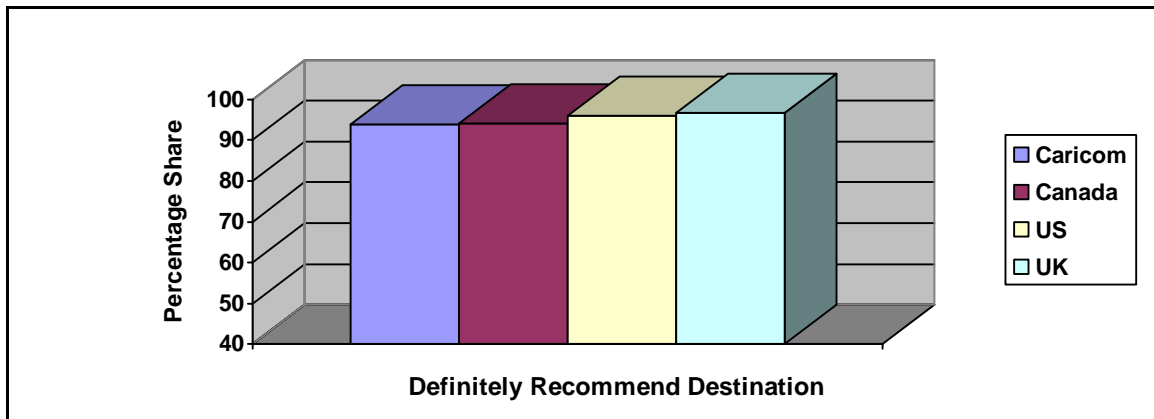
Based on purpose of visit, the most significant portion of visitors for carnival comprises visiting friends and relatives (VFRs), which accounts for just under 50% of total carnival visitors in 2004 (see Table 31). Majority of this group came from the United States (61.4%), followed by Canada (52.4%), and the United Kingdom (40.7%) (See Table 18). Most VFRs reside in diasporic Caribbean communities such as New York, Miami, Boston, Toronto, and London where similar Caribbean carnivals are held. This extension of the domestic market serves as an important source of word-of-mouth marketing of carnival. Statistics show that of the visitors interviewed, a significant portion of visitors from the diasporic markets indicated that would definitely recommend Trinidad and Tobago as a destination (see Figure 8). In all markets, over 90% indicated that they definitely recommend Trinidad and Tobago.

**TABLE 30: VFRS FOR CARNIVAL 2004, BY COUNTRY OF RESIDENCE**

Country of Residence	Visiting Friends and Relatives
Caricom	8.7
Other English Caribbean	26.7
Other Caribbean	12.5
Belize, Haiti, Suriname	0.0
Central and South America	0.0
Canada	52.5
United States of America	61.4
United Kingdom	40.7
Germany	0.0
Other Europe	23.5
Rest of the World	26.7
TOTAL	47.1

**Source:** Central Statistical Office (2004) “Carnival Report 2004”.

**FIGURE 8: WILLINGNESS TO RECOMMEND TRINIDAD & TOBAGO BY MAIN DIASPORIC MARKETS**



**Source:** Central Statistical Office (2004) “Carnival Report 2004”.

During the carnival period, a substantial amount of revenue is derived from visitor expenditure. This is generally of two forms. The first relates to expenditure on accommodation and meals; including spending in the wider hospitality sector. The second relates to spending on entertainment goods and services, land transport and shopping.

Based on the sample of accommodation rates charged during the period as illustrated in Table 29, it is clear that the accommodation sector derives substantial revenue from the carnival period. For the 2004 carnival period, it is estimated that visitors spent a total TT\$42.5 million on accommodation at hotels and guesthouses<sup>43</sup>. This represents a significant increase from previous years, where during the period 1997 and 2001, expenditures on hotel and guesthouses increased from TT\$6 million in 1997 to TT\$28 million in 2001 (Nurse, 2004: 4). Carnival has also stimulated the development of the much-needed bed and breakfast sector that complements Trinidad's relatively small hotel plant.

The wider hospitality sector would include entertainment, tours, land transport and shopping. Average expenditure per person visiting for Carnival on these areas was a moderate TT\$156.00, a slight decline from TT\$161.00 in 2001. Of this amount, entertainment ranked the highest, accounting for 69% of average daily expenditure on these categories (CSO, 2004).

Overall, 2004 carnival visitors spent a total of approximately TT\$173.1 million<sup>44</sup>. This compares favourably with total visitor expenditures of past carnivals (see Table 32). The statistics show that there has been a steady increase in visitor expenditure during the carnival period since 1999. Visitor expenditure gained during the carnival season creates a favourable boost to the macro-economy. It contributes to government's tax revenues, mainly through departure tax and value added tax; and also increases the foreign exchange reserves.

---

<sup>43</sup> Based on CSO data in Carnival Report 2004.

<sup>44</sup> Carnival visitor expenditure calculated based data derived from "Carnival Report 2004", Central Statistical Office, 2004.

**TABLE 31: CARNIVAL VISITORS AND EXPENDITURES, 1999 - 2004**

Year	Number of Carnival Visitors	Visitor expenditures (TT\$ m)
1999	31,609	\$108.6
2001	41,495	\$128.4
2004	40,455	\$173.1

**Sources:** Central Statistical Office (2004) “Carnival Report 2004”; Keith Nurse (2004) “Trinidad and Tobago Carnival: From an Event to an Industry”.

Overall, carnival offers much to the further development of Trinidad and Tobago as a premier destination in the region. The carnival provides invaluable place marketing that gives Trinidad and Tobago the allure of being one of the trendiest places to visit in the region and possibly in the Americas. As such, the carnival acts as an image-maker and provides solid destination branding for Trinidad and Tobago.

### 2.2.5 The Overseas Carnivals

The growth of overseas carnivals particularly in North America and Europe represents another important economic dimension of carnival. These carnivals have all been developed based on the Trinidad and Tobago carnival, and in many instances continue to draw on the resources from Trinidad and Tobago. In particular, the annual export of music, mas and manpower to these diasporic carnivals has created “transnational economic flows” that have fostered the development of the domestic carnival industry into an export sector. Many local recording artists, music bands and carnivalists spend much of their time outside of Trinidad and Tobago throughout the year servicing these Carnivals.

According to Nurse (2000: 4) “these carnivals are now the largest generators of economic activity in their respective locations”. As Table 33 illustrates, the three major diasporic carnivals, Caribana (Toronto), Labour Day (New York) and Notting Hill (London) generate millions of dollars in visitor expenditure. A 2003 economic impact study of Notting Hill Carnival indicates that of the £93 million generated, approximately £36 million represented direct expenditure of attendees over a three-day period. Direct economic impact of New York Labour Day totaled US\$86 million in 2003 ([www.carnaval.com/2004/brooklyn\\_carnival.htm](http://www.carnaval.com/2004/brooklyn_carnival.htm)).

**TABLE 32: ECONOMIC IMPACT OF DIASPORIC CARNIVALS, 2002**

	Total Attendees	Total Income Generated
Notting Hill Carnival (UK)	1.6 million	£93 million
New York Labour Day (US)	3.5 million	US\$154.8 million
Toronto Caribana (Canada)	1.1 million	CND\$200 million

**Sources:** London Development Agency (2003) “The Economic Impact of the Notting Hill Carnival”; [www.carnaval.com/2004/brooklyn\\_carnival.htm](http://www.carnaval.com/2004/brooklyn_carnival.htm) “Brooklyn Carnival Economic Impact Study Released”, Hardbeat News Report, accessed 04/09/2005.

There are currently over 80 Caribbean-styled carnivals (see Figure 9), which promote the culture and heritage of the Caribbean, particularly that of Trinidad and Tobago. These carnivals thus also represent an important media of promotion and marketing of the Trinidad and Tobago carnival.

**FIGURE 9: DIASPORIC CARIBBEAN CARNIVALS**

<p><b><u>UK (52)</u></b>            Acton Carnival – London            Adlington District Carnival            Barrow in Furness            Balham Carnival            Bedford Carnival            Birmingham Carnival            Bloxwich Carnival – Walsall            Bradford Carnival            Bridgewater Carnival            Bristol-St. Paul’s Carnival            Broomfield Carnival            Cambridge Carnival International            Cardiff Mas Carnival – Wales            Chirivari Day - Folkstone            Cleethorpes Carnival Parade            Coventry Caribbean Festival            Croyden Mela Festival            Derby Carnival            Devizes Carnival            Dover Carnival            Edinburgh Mela            Glouchester Carnival            Hackney Mare De Gras            Hereford Carnival            High Wycombe Carnival            Hinckley Carnival            Huddersfield Carnival            Kendal Torchlighting Carnival            Leeds West Indian Carnival            Leichester Caribbean Carnival            Liverpool Brouhaha Int’l Carnival            Luton Carnival            Manchester Int’l Caribbean Carnival            Newcastle Carnival            Newham Africabana            Norwich Lord Mayor’s Procession            Notting Hill Carnival            Nuneaton Carnival            Oldham Carnival            Plymouth Carnival            Preston City Caribbean Carnival            Reading Community Carnival            Ryde Carnival            Sheffield Carnival            Southampton Carnival            Stafford Carnival            Stoke-On-Trent Carnival</p>	<p>Waltham Forest Caribbean Carnival - London            Woking            Wolverhampton Carnival            Wycombe Multi-Cultural Carnival</p> <p><b><u>Europe (4)</u></b>            Rotterdam – Netherlands            Nice – France            Stockholm – Sweden            Nyon – Switzerland</p> <p><b><u>US (27)</u></b>            Atlanta Caribbean Folk Festival            Baltimore Carnival            Bayou Bacchanal            Boston Carnival            Brooklyn Labour Day Carnival            Cambridge Carnival Int’l – Massachusetts            Carama – Albany NY            Caricabela – Los Angeles            Carnaval San Francisco            Chicago Carnival            Dallas Caribbean Festival            DC Carnival            Detroit Carnival            Hartford Carnival            Houston Carnival            Jacksonville Beach Carnival            Jersey City Caribbean Carnival            Long Island Carnival            Miami Carnival            Oakland Carnival            Orlando Carnival            Philadelphia Carnival            Rochester Carnival            Springfield Carnival            Tallahassee Carnival            Tampa Bay Caribbean Carnival            Westchester</p> <p><b><u>Canada (7)</u></b>            Calgary Carnival            Caribana – Toronto            Caribe-Expo – Ontario            Caripeg – Manitoba            Carnival de Quebec            Edmonton Carnival            Vancouver Carnival</p>
---	--

## **2.2.6 Institutional Support for the Carnival Industry**

The number of organizations existing to facilitate the development of the Carnival industry is extensive. Most of these organizations fall under the auspices of the Ministry of Community Development, Culture and Gender Affairs.

### **2.2.6.1 The National Carnival Commission of Trinidad and Tobago (NCC)**

Website: [www.ncctt.org](http://www.ncctt.org)

Tel: 627-1350/ Fax: 623-1391

Email: [nccmac@tstt.net.tt](mailto:nccmac@tstt.net.tt)

Kenneth De Silva – Chairman

The NCC is a statutory body established by an Act of Parliament in 1991 as the successor to the Carnival Development Committee (CDC), which was established in 1957. The mission of the NCC is as follows:

- To make Carnival a viable, national, cultural and commercial enterprise;
- To provide the necessary managerial and organizational infrastructure for the efficient and effective presentation and marketing of the cultural products of Carnival; and
- To establish arrangements for ongoing research, the preservation and permanent display of the annual accumulation of Carnival products created each year by the craftsmen musicians, composers and designers of Carnival.

The NCC is charged with regulating, coordinating and promoting all Carnival activities and Carnival related industries in the country. The events that the NCC is responsible for organizing include Junior Parade of the Bands, Dimanché Gras, J'Ouvert Celebrations, Kiddies Carnival and Parade of the Bands.

The NCC is also responsible for encouraging bilateral exchanges with foreign organizations to promote Trinidad and Tobago Carnival, as well as encouraging the growth of other regional Carnivals.

The organization offers as part of its range of products and services:

- The rental of facilities at the Queen's Park Savannah including:
  - The Grand Stand and Forecourt - Used for Cultural, Sporting, Religious Events, Awards Ceremonies, Festivals and Exhibitions;
  - The Concourse – with a large number of booths used for displaying various aspects of Carnival including traditional costumes;
  - The Clubhouse - Used for Weddings, Cocktail Parties, Birthday Parties, Graduations, Seminars and Conferences; and
  - The Paddock – Used for Concerts, Fetes, Fairs, Flea Markets and Sporting Events.
- Event management;
- Consultancy Services – providing technical assistance and expertise on Carnival Arts and Culture both locally and internationally.

### **2.2.6.2 The Carnival Institute**

c/o Creative Arts Centre, The University of the West Indies, St. Augustine

Tel: 663-1334

Kenny De Silva – Chairman, Pat Bishop – Director, Judith Blackman – Executive Assistant

The Carnival Institute is a statutory body under the Ministry of Community Development, Culture and Gender Affairs as a subdivision of the National Carnival Commission. It was first launched on August 13, 1999 at the Queen's Park Savannah and is essentially a research-based organization whose primary function is to comprehensively document and catalogue, using interviews and multimedia, all things to do with Carnival. One of the institute's main projects is to create an archive of material on the carnival and its pioneers consisting of DVDs, videos, photographs and newspaper clippings.

### **2.2.6.3 National Carnival Bands Association of Trinidad and Tobago (NCBA)**

Website: [www.ncbatt.com](http://www.ncbatt.com)

Queen's Park West, Port of Spain

Tel: 627-8323/ 1422, Fax: 625-9772

Email: [info@ncbatt.com](mailto:info@ncbatt.com) / [ncba\\_tnt@hotmail.com](mailto:ncba_tnt@hotmail.com)

Michael Heath – General Manager

The National Carnival Bands Association is an agency under the National Carnival Commission of Trinidad and Tobago (NCC) as a representative body to make recommendations to the Government on improved conditions, facilities and prize money for Carnival Mas Bands. The Association has various Carnival committees, such as the Junior Carnival Committee, the Pre-Carnival Committee and the Traditional Mas Committee, which make recommendations on the improvement of Carnival. These committees have representation from all the stakeholders including the Ministry of Works and Transport, the Radio Emergency Associated Communications Team (REACT) and the Police,

The NCBA was established in 1987 to replace the Carnival Bandleaders Association to facilitate more extensive membership. In 1994, the NCBA, in collaboration with the Ministry of Culture, hosted the first ever King and Queen of the World competitions with competitors from Anguilla, Belize, the British Virgin Islands (BVI), Jamaica, St. Lucia, St. Vincent, Canada, the United States, England, Germany and Sweden. Unfortunately, this competition was never repeated due to a lack of financing. The NCBA receives Government subventions to assist with the payment of prizes for its various competitions. Prizes usually amount to approximately TT\$2.3 million annually.

In addition, the NCBA assists other regional and internationally based Trinidad-style Carnivals including those in St. Vincent, Barbados, and England. Assistance is provided in judging, training, and building costumes. The Association assists with transportation for local bands, and has been responsible for the staging of Tobago Fest for the last seven years. As part of the educational aspect of their activities, a project that has been recently started is one whereby persons between the ages of 9 - 18 years are sent to Trinidad from England to do an internship on various aspects of mas. Workshops are held in Tobago whereby schools and community centers



are targeted to improve awareness. The NCBA has twelve Executive Officers who are elected for three-year terms. There are eight (8) full time employees in the Trinidad office and six (6) in the Tobago office.

#### **2.2.6.4 Uptown Carnival Improvement Committee**

210 Laventille Road East Dry River, Port of Spain

Tel: 628 – 2174, Fax: 627 – 4560

Mr. Best – President 624 – 3866, Ms. Agnes Ragubarsingh – Secretary 624 – 1024.

This committee was established in 1994 by Dr. Vijay Ramlal who decided to bring back Carnival on Piccadilly Greens. The committee, which consists of over 18 members, falls under the auspices of the Ministry of Community Development, Culture and Gender Affairs. Its objective is to develop the community and its surroundings and to eradicate the negative perceptions of the East Dry River region. Funding is attained from the National Carnival Commission and the Ministry of Culture. Corporate Sponsors also assist the committee with prizes. Annual initiatives include an Emancipation Program on the Piccadilly Greens, which has been held for the past six years, an Independence promotion and a Christmas promotion.

#### **2.2.6.5 Carnival/ Cultural Judges Association of Trinidad and Tobago (CJATT)**

Tel: 624 – 1024 / 628 – 2174

4 Zoo Road Emperor Valley Zoo, Port of Spain

Email: [judgesassociation@yahoo.com](mailto:judgesassociation@yahoo.com)

Vijay Ramlal – President

CJATT was established in 1989 as an Educational and Cultural Organization, specialized in training adjudicators in all aspect of our cultural milieu of Trinidad and Tobago such as the Steelpan, Calypso, Chutney, Costume, Dances, Drumology, Parang, Beauty Pageants, Tassa, Music etc. The Association also established with UWI School of Continuing Studies, St. Augustine a proto-type blue print of a training programme administering the above with a minimum of 150 contact hours. All successful students will receive a UWI Certificate, which allows five credits of any full time course at any University. CJATT has sent members to adjudicate various Carnival and Cultural Events worldwide i.e. USA, Canada, Europe, Caribbean Islands and in Trinidad and Tobago.

#### **2.2.6.6 International Caribbean Carnival Association (ICCA) Trinidad**

Tel: 628-2174

P. O. Box 4361 St. Ann's

Ms. Agnes Ragubarsingh

The International Caribbean Carnival Association (ICCA) is an international umbrella organization, representing the interests of the carnival sponsoring groups in the USA, Canada, England, Europe and the Caribbean. The ICCA was formed out of a need for unity through out the Carnivals Communities in North America and Europe. Previously the North American-England International Carnival Association formed in 1986, this organization was reconstructed in 1993 as the ICCA.

### **2.2.6.7 National Carnival Development Foundation (NCDF)**

David Mc Kell – Secretary

c/o Laser Graphics Marketing, 19 Stanmore Avenue, Port of Spain

W: 624 – 3417 / 625 – 2357 / 623 – 1431, Fax: 625 – 6857

Email: [lgmmtg@tstt.net.tt](mailto:lgmmtg@tstt.net.tt)

The National Carnival Development Foundation is a registered NGO representing mas bands in Trinidad and Tobago. The new body was formed after disagreements between bandleaders and the National Carnival Bands Association (NCBA) polarized both groupings. The NCDF believes irreconcilable differences will thwart any attempt at amalgamation and is prepared to represent its membership as a solo entity. NCDF's projects include workshops on mas in collaboration with the Centre for Festival and Creative Arts such as "The Art of Masquerade – Design or Mas."

### **2.2.6.8 National Cultural Promotions of Trinidad and Tobago**

Tel: 625 - 1644/ 624 - 1024

Email: [cftt@hotmail.com](mailto:cftt@hotmail.com)

Ms. Agnes Ragubarsingh

This organization falls under the auspices of the Ministry of Culture, Community Development and Gender Affairs. It was launched in 1994 with a mandate to promote culture in general. During peak periods (Carnival season) the office has a full time staff of five employees, but otherwise there is no official office location. Some of the initiatives include the Ragga Soca Monarch Competition, promotions for Independence celebrations and the promotion of the National Chutney Monarch Competition. Funding is obtained from the Ministry of Culture, Community Development and Gender Affairs and other sponsors.

### **2.2.6.9 Centre for Creative and Festival Arts, Faculty of Humanities and Education, U.W.I.**

Website: <http://www.festival.uwi.tt>

The University of the West Indies, St. Augustine

Tel: 663 – 2222, Fax: 663-9684

Email: [festival@tstt.net.tt](mailto:festival@tstt.net.tt)

Rawle Gibbons – Director

Formal training in Carnival Studies is provided at the Centre for Creative and Festival Arts as an undergraduate major (Bachelor of Arts B.A.). This major includes a number of courses preparing students not only for academic and artistic work in this field but for the management of Carnival and other festival-type events. This preparation includes one-semester attachments in the industry. The entry requirements include GCE A' Level subject passes and a B+ average in the Practitioner's Certificate in Drama-in-Education / Theatre-in-Education.

## **Analysis of Visual and Performing Arts – Industrial Structure and Context**

Visual and performing arts are traditionally regarded as areas of artistic endeavour that exist mainly for the aesthetic gratification of their creators and society. As such, “the Arts”, as they are more commonly referred to, are often deemed by some quarters of society as noble, “pure” and free of commercial and economic consequences. This perception has spawned the misperception of the arts as simply “creative past-times” that should be preserved as much as possible in their original form. For the most part, this view has informed the national policy approach to culture, and has in turn inhibited the growth of local arts as industries.

The Arts do not consistently receive the appropriate political, institutional and investment support that is so critical to their industrial development. As a result, most practitioners in the Arts have not been able to pursue full-time employment as artists to develop the creative careers of their choice. Indeed, there are many talented and creative arts practitioners in Trinidad and Tobago, however the majority cannot solely depend on their creativity to survive.

Thus, the vision to develop export-oriented “arts as entertainment” comes with a number of socio-cultural challenges that must be overcome. Sustainability and export success of the local arts reside in the willingness of the people and government of Trinidad and Tobago to:

- Appreciate the value of the arts to society and economy;
- Recognize the arts as more than creating art for art’s sake;
- Accept that there is a dynamic interplay between art and entertainment, that can foster the development of creative sectors in the economy that are complementary to music; and,
- Aggressively approach fostering such sectors.

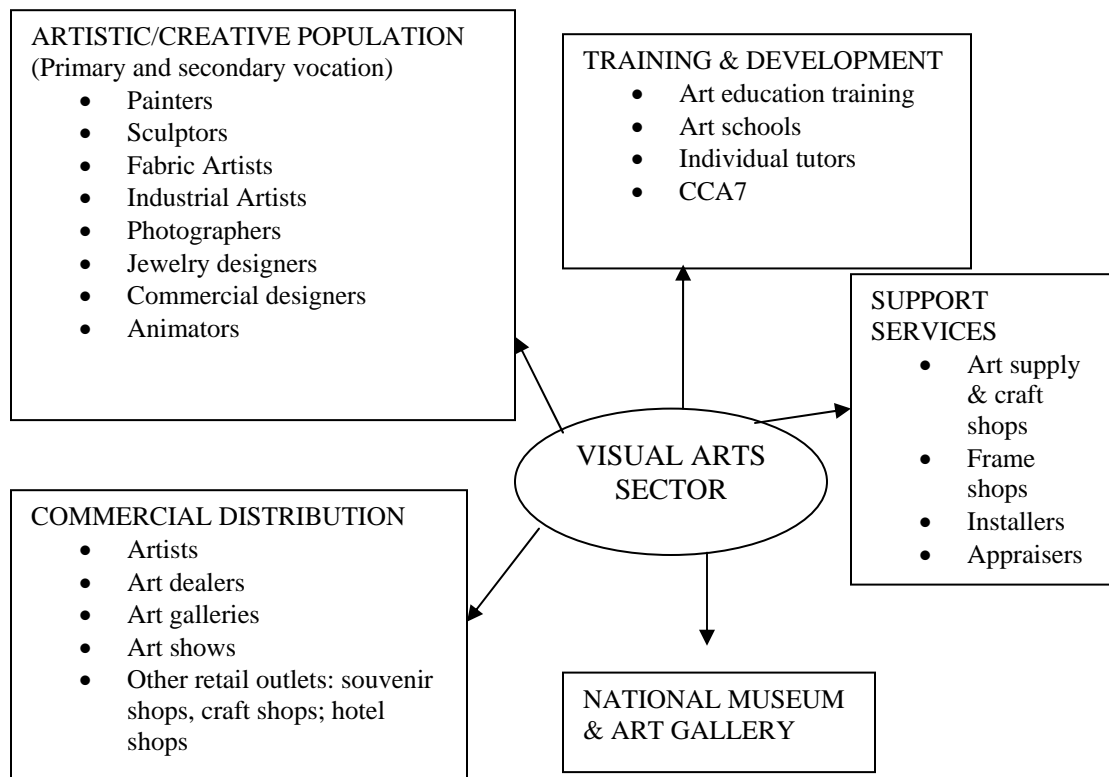
In addition to the above, successful export rests on developing the domestic environment that would stimulate consistent economic activity to transform the Arts to formal sectors in the economy. In the case of the performing arts, the domestic environment has hardly been nurtured towards creating industries. The case is much the same for visual arts. Although it is clear that there are a number of firms and entrepreneurs operating within visual arts that export, the domestic market and local infrastructure for visual arts is relatively weak, which has inhibited its overall growth.

## 2.3 The Visual Arts Sector

The Visual Arts Sector in Trinidad and Tobago has evolved to encompass a number of small firms and entrepreneurs alongside its creative/artistic population (see Figure 10). The visual art product in Trinidad and Tobago can be defined as, but is limited to:

- Original Drawings
- Original Paintings
- Original Sculpture
- Original Jewelry
- Craft
- Textiles
- Industrial Art
- Graphic Design
- Animation

**FIGURE 10: STRUCTURE OF THE VISUAL ARTS SECTOR**



### **2.3.1 Artistic/ Creative Population and Support Services**

It is not certain the exact number of persons employed within visual arts, since many of the creative population also pursue other means of employment in order to remain financially secure. It is known that in the support services, most operate as small businesses and are therefore likely to employ about 3-5 persons depending on the size and scope of the business. There are currently 9 major art supply retailers and 8 art and craft supply retailers in Trinidad and Tobago. Art galleries currently number 14 (2 in Tobago), most of which employ about 3 persons. In some instances, employment may be part-time, depending on the level of traffic generated by the art gallery and the number of new installations and showings it might have in a year.

Specialized services in visual art are somewhat limited. For example, visual art education, art installation and artwork appraisal are currently the main services offered on the local market, but there are very few persons operating in these fields. Other specialized services in art consulting such as art critics; art researchers; art publishers; and art historians are practically non-existent. This is perhaps due to the fact that although the visual art product in Trinidad and Tobago is quite broad, domestic market demand is rather static. Consequently, there is little incentive to pursue careers as art specialists.

### **2.3.2 Commercial Distribution**

For the most part, commercialization within visual arts has not occurred without challenge, since the market for visual arts products and services has remained relatively underdeveloped. Currently, commercial activity in visual arts occurs on the retail side through: artists directly selling their work; art gallery operations; and in terms of the support services such as art supplying; installation services and art appraisal. Export activity is also evident – some artists sell their work directly to foreign buyers, at art auctions/showings abroad, and in more recent times via the Internet.

The relatively low-key domestic market can be attributed to the fact that overall, demand for visual art in Trinidad and Tobago is relatively weak and inconsistent. Assessment of market demand shows that:

- Only about 2% of households in Trinidad and Tobago purchase local art. The opportunity to develop a cadre of individual patrons that would strongly support the development of the sector is limited, since the market of individual collectors is relatively small, although it has expanded over the past decade.
- For the average household in Trinidad and Tobago, the cost of original artwork is perceived as prohibitive, and cannot be afforded on the average household's disposable income. Consequently, most households purchase imported print art and ceramics. These products have become strong substitutes to original art, particularly with the growth of the retail "Ten-Dollar" stores, where they are predominantly sold.
- A small number of companies tend to purchase artwork - mainly the work of a select few. The company may commission the artist to create the work or may purchase through an art gallery. In many cases, the selection is done based on what is perceived and valued as

“legitimate” and “good” art. This system of valuing art is derived from the global cultural politics dichotomy between “high art” - normally regarded as legitimate and of high quality, usually validated by the elite; and “low art”, which is viewed as appealing to the masses and not of a high standard, and is alternatively labeled as “mass” or “popular” art. For the most part, local art is also subjected to this value system, and much of it is regarded as popular art, and hence deemed as not necessarily appropriate for the corporate sector. This misperception has fostered the practice within the private sector of being conservatively selective in their art purchases. As a result, many artists’ works are not purchased by the corporate sector.

- Government ministries, departments and public sector enterprises seldom purchase art. Some Ministries have invested in a few pieces, but this is not done on a consistent basis. Traditionally, Government has not regarded the visual arts as a “serious” form of enterprise, and has therefore not given it the required political and economic support. This pales in comparison to other countries in the region such as Cuba, Martinique and Jamaica where art is given stature. Industry sources indicate that in Jamaica for example, legislation has been passed that mandates 1% of construction costs to be allocated to purchasing art.
- Artwork purchased by government is normally through the national Museum and Art Gallery. However, the museum functions with limited resources and support. Most artwork at the museum falls into the category of “high art” and therefore appeals more so to the high-end visual art enthusiasts.
- Art galleries in Trinidad and Tobago represent the largest demand source and major distribution point for local art. The art gallery is an important institution to the circulation and display of art in Trinidad and Tobago – it acts as a sales outlet and art broker and in this sense provides commercially based, private sector infrastructure for art. However, the weak domestic market has also begun to affect the financial viability of many art galleries. Within the last two years, 4 art galleries have closed their doors. As a result, the space for showcasing art has become even more critical.
- Only a few artists export their work through independent initiatives, as it is difficult to secure financial support to explore potential foreign markets. Three main avenues of export have been tapped thus far: use of the internet to market the work; showcasing the work in foreign art galleries; and embarking on exchange programmes with artists in markets such as Cuba, Dominican Republic and Martinique, which can lead to the sale of work. In this regard, Caribbean Contemporary Arts has been very instrumental in facilitating exchange programmes with artists from around the globe.

Use of the internet to market and sell artwork is growing slowly among the visual arts community, and is likely to gain popularity. The internet gives visual artists access to a wider market, and provides art enthusiasts a convenient way to view a wide range of artwork. One local Organization that has tapped into this aspect of the industry is Cari-culture.com, the virtual arm of The Southern Art Gallery based in San Fernando. Cari-culture has turned the obstacle of limited markets for local visual artists to creating opportunities for market expansion via its

Caribbean Art Portal, which allows local artists to showcase their works to the world. According to the website, the role of cari-culture.com is to “constantly promote and market members’ artwork to both local and foreign galleries, dealers, collectors, and art enthusiasts”. Its services include a range of specialized art services including matting and framing, installation, art consulting, corporate exhibitions and e-portfolio development for artists. Cari-culture also offers art marketing services and as such acts as the artist’s agent. Thus far, the website has been able to tap into the regional market, not only via the website, but through its members’ presence at a number of regional art exhibitions. Cari-culture represents an important export initiative that must be encouraged and fostered.

### **2.3.3 National Museum and Art Gallery**

Frederick & Keate Sts, Port of Spain

Tel: 623 – 5941, Fax: 623 – 7116

Email: [museum@tstt.net.tt](mailto:museum@tstt.net.tt)

Mr. Vel Lewis - Curator

The National Museum and Art Gallery is a section of the Ministry of Community Development, Culture and Gender Affairs. It is funded entirely by the Government of Trinidad and Tobago. There are currently twenty-four (24) employees. The objectives of the National Museum are:

- To support the development and care of significant and representative collections in Trinidad and Tobago taking into account the country’s diversity;
- To promote access for citizens to their human and natural heritage collections;
- To foster a greater awareness and understanding locally and abroad of the significance and richness of the country’s heritage;
- To encourage continued development of excellence in the museum’s service.

Throughout the year there are displays of the national art collection and various artifacts and heritage objects related to the history and ecology of Trinidad and Tobago. Some of the Museum’s activities include a temporary exhibitions programme, quarterly museum concerts, the Children’s Heritage workshop and video presentations. The Museum also hosts monthly poetry readings and for a on the tangible and intangible heritage.

### **2.3.4 Training and Development**

Among the Arts, formal training in visual art is perhaps the most established within the national curricula. Visual art is taught at the primary school level and through to the secondary school level, where it is examined at CXC and Advanced Levels. Art training is also provided through private tutoring. In recent times there has been increasing focus on the use of visual arts as a teaching aid to improve the standard of reading and writing among primary school children. This is regarded as a key area for development within the visual arts sector as it can serve to further expand the career options in art education. In addition, art in education can be useful in creating a more stimulating learning environment for children while at the same time exposing young people to visual arts, and in this sense create opportunities for molding new artists from an early age.

Training is also provided at the degree level at the Centre for Creative and Festival Arts and at the vocational level through the Youth Training and Employment Partnership Programme (YTEPP). Research on art training programmes shows, however, that art education tends to focus primarily on fine art and painting and other traditional forms. Contemporary artwork and experimentation is mostly limited to training in craft and textiles. As a result, art students are not fully exposed to contemporary artforms. This void must be urgently addressed since many of the cutting edge areas in the global visual arts market fall within the contemporary genre. This includes animation; commercial designs and industrial art. Greater incorporation of contemporary art in the curricula would also aid in attracting more young people to visual arts as a career and also widen the career opportunities for art practitioners.

#### **2.3.4.1 Centre for Creative and Festival Arts, Faculty of Humanities and Education, U.W.I.**

Website: <http://www.festival.uwi.tt>

The University of the West Indies, St. Augustine

Tel: 663 – 2222, Fax: 663-9684

Email: [festival@tstt.net.tt](mailto:festival@tstt.net.tt)

Rawle Gibbons – Director

#### **Education and Training, Performance Space**

The Centre for Creative and Festival Arts is a regional institution established in 1986 to serve the needs of the Eastern Caribbean for tertiary level training in the arts. The Centre is also mandated to assist in researching, analyzing, recording and disseminating the history and cultures of the Region. There are approximately thirty (30) part-time staff and eleven (11) full time staff. The Centre offers certificate programmes in visual arts, and undergraduate majors (Bachelor of Arts B.A.) in Visual Arts (Special). The entry requirements for the B.A. include an interview (with portfolio), at least a CXC General Grade I or GCE O' Level pass in Art, plus two GCE A' Level (or equivalent) for the special in Visual Arts and a B+ average in the Certificate in Visual Arts to enter Year I of the BA programme. The major includes one-semester attachments in the industry.

#### **2.3.4.1 Youth Training and Employment Partnership Programme (YTEPP)**

Website: [www.ytepp.gov.tt](http://www.ytepp.gov.tt)

22 – 24 St. Vincent St., Port of Spain

Tel: 625 - 1005/ 8308-9/ 624 – 5123, Fax: 625-0674

Email: [ytepp@tstt.net.tt](mailto:ytepp@tstt.net.tt)

Kyle Thomas – Chief Executive Officer

The Youth Training and Employment Partnership Programme (YTEPP) was established by the Government of the Republic of Trinidad and Tobago (GORTT) in conjunction with the World Bank in 1988 to reduce youth unemployment. The organization provides skills training to persons between 15 and 25 years, who are out of school and unemployed. Since 1998 GORTT has funded 100 percent of YTEPP, which reports to the Ministry of Science, Technology and Tertiary Education. YTEPP offers technical and vocational education and training (TVET) at Level I and Level II i.e. Pre-craft and Craft training.



The organization employs 538 people. Classes are conducted at three full time centers and 22 part time centers, as well as in various communities, both in Trinidad and Tobago. With respect to the entertainment industry YTEPP currently offers six-month courses in applied arts including Photography, Graphic Design, Screen Printing and Textile Design and Print. In the area of craft, YTEPP offers courses in Ceramics and Construction. An eighteen-month course in Sound Engineering is scheduled to commence in October 2005. YTEPP also provides customized training to various organizations and communities. The National Examination Council certifies the vocational courses.

### **2.3.4 Institutional Framework for the Visual Arts Sector**

The institutional framework for the visual arts sector is limited when compared to the other sectors in the entertainment industry. Apart from those previously described, the main organizations within this sector are outlined as follows:

#### **2.3.4.1 Caribbean Contemporary Arts (CCA7)**

Website: [www.cca7.org](http://www.cca7.org)

Building Number 7, Fernandes Industrial Centre, Eastern Main Road, Laventille, Port of Spain

Tel: 625 1889 / 625 6805 Fax: 624 0695

Email: [mail@cca7.org](mailto:mail@cca7.org)

Charlotte Elias – Director

Founded in 1997, CCA7 began operations in June 2000 when it opened Trinidad's first multi-purpose contemporary arts center. The institution works with contemporary visual artists, curators, writers, historians and art educators from the Caribbean and the Caribbean Diaspora to exhibit, publish and document the region's art practice, influences and ideas. Some of CCA7's projects and programmes include coordinating participation in international workshops such as the Triangle International Artists Workshops – an emersion programme for artists in a remote location in a different country every year, organizing local workshops such as the “Saturday Morning Kids Club” – an art workshop for children, ages 4 - 12. CCA7 also has a residency programme and an exhibition programme such as “The Wall Space” which features a new artist every two months. There is also a library with publications on the regional and international visual arts, cultural studies and arts administration. CCA7 has as part of its objectives an audience development, education and outreach program designed to encourage the visual arts to become more integral in the community. This not-for-profit organization is in essence a multi-purpose contemporary arts centre that comprises the first ‘studio-building’ in the English-speaking Caribbean, where artists can work freely.

#### **2.3.4.2 The Arts Society of Trinidad and Tobago**

Website: [www.artsocietytt.org](http://www.artsocietytt.org)

Corner Jamaica Boulevard and St. Vincent Avenue, Federation Park, Port of Spain

Tel: 622 – 9827 / 623 – 5461 Extension 225

Email: [hiltoncl@trinidad.net](mailto:hiltoncl@trinidad.net)

President: Courtenay B. Williams

The Art Society of Trinidad and Tobago is another important institution in the local visual arts landscape. The association has been in existence since 1943 (then named the Trinidad Art Society) and has helped to foster the professional development of visual artists in Trinidad and Tobago. In its early years, the association has been particularly instrumental in providing free lectures, books and scholarships, classes and critiques. The Society has attempted to maintain its role in artist development through the establishment of its Art Centre, which is used for exhibitions, teaching seminars, workshops, and other art activities. Notwithstanding the importance of professional development, the Art Society can also play a crucial role as advocate for local visual artists. As such the Art Society can be instrumental in setting industry standards, norms and practices by which the local visual arts sector abide. Currently, the organization has over 120 members, and is therefore in a strong position to act in this capacity.

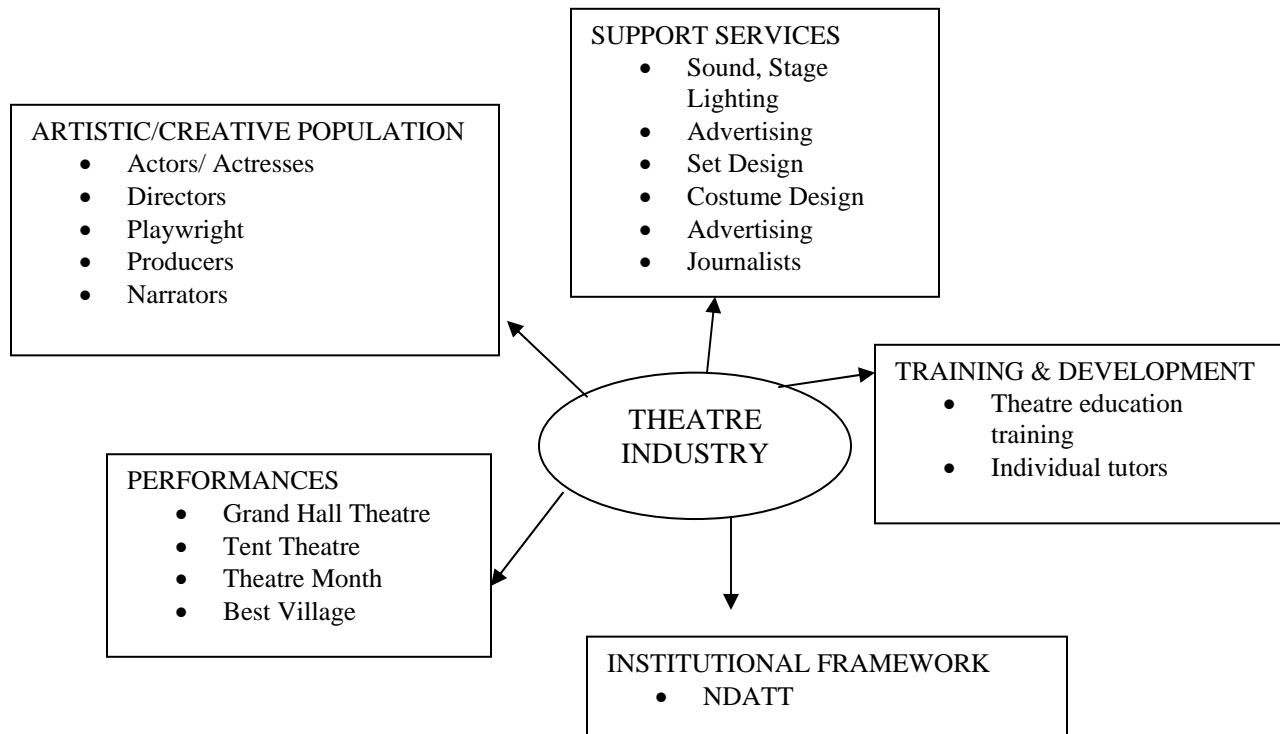
## 2.4 The Theatre Industry

*“Theatre in Trinidad and Tobago has developed in a fragmented manner with several groups of performers producing separate works. These groups have grown from an indeterminate reservoir of natural talent and artistic energy.”*

Trinidad Theatre Workshop (2004), [www.ttw.org.tt/school\\_for\\_the\\_arts.htm](http://www.ttw.org.tt/school_for_the_arts.htm)

Theatre in Trinidad and Tobago operates mainly as an art form, within which some commercial activity occurs (See Figure 11).

**FIGURE 11: STRUCTURE OF THE THEATRE INDUSTRY**



### 2.4.1 Artistic/ Creative Population and Support Services

This relates primarily to the production side of theatre, where producers, directors, stage managers, production assistants, musical directors, wardrobe and costume personnel, sound, stage and lighting personnel, and actors are involved in creating theatrical pieces for which they are in turn compensated. Income in theatre is not consistent throughout the year, and as a result, most theatre practitioners must rely on other sources to survive. Unofficially, there is a theatre season that begins after Carnival until early August and then continues from October to December. Most theatre performances take place during these periods, with very little activity in the “off-season”. As such, there are few within the fraternity who operate as full-time professionals.

## 2.4.2 Performances

Theatre in Trinidad and Tobago has evolved over the years to encompass a range of forms – Afro theatre, European/American performance, tent theatre, street theatre, best village theatre and ‘grand hall’ theatre. A quick review of past productions shows that tent theatre has generated much of the commercial activity within the theatre movement. Most productions emerging from this form have typically focused on comedies, which hold strong market appeal among theatre-goers. Traditionally, these productions are held in Port of Spain and its environs, mainly because the most appropriate auditoria for theatre - Little Carib Theatre, Queen’s Hall and the Central Bank Auditorium - are located there. Naparima Bowl is perhaps the only existing theatre space outside of the capital city’s environs. From a marketing standpoint the locations have also been appropriate because of their close proximity to the target markets. Producers indicate that box office does extremely well when the productions are held in Port of Spain. This combination of factors has spawned the characterization of local comedies as Port of Spain theatre.

Because of its commercial nature, there is the notion among some that Port of Spain theatre is not ‘serious’ theatre. This may be attributed to the fact that the productions tend to be scripted, packaged and marketed in a way to draw interest from the general public and not necessarily only theatre-goers. As such the comedies represent a form of popular culture that essentially generates mass appeal. From a strategic marketing standpoint, these productions have a role to play in drawing larger audiences to the theatre, and in a sense build community support for theatre.

It would appear that ‘Best Village’ theatre has been more successful at building community support, although these productions do not necessarily achieve commercial success. In addition, its community support is somewhat limited to the villages and communities from which the productions originate. Nevertheless, the best village context is useful in that it provides the foundation for what might be considered part of the national theatre of Trinidad and Tobago. It also encourages young people to become involved in theatre and can be harnessed to become a springboard for young people to do further work in theatre. In this sense, theatre could provide creative alternatives away from crime. It is important that there is continual development of theatre practitioners and the Best Village context should be structured to be also used in this way.

Indeed, it is recognized that one of the primary challenges to building and sustaining widespread community support and market appeal, has been the lack of appropriate space for theatre throughout Trinidad and Tobago. To date, a National Theatre with nodes throughout Trinidad and Tobago does not exist, and spaces for training and rehearsal are very limited. This has inhibited the development of theatre, as a product as well as in terms of market expansion.

### **2.4.3 Training and Development**

#### **2.4.3.1 Ministry of Community Development, Culture and Gender Affairs**

ALGICO Building, Jerningham Avenue, Belmont

Tel: 625-3012/ 625-3112, Fax: 625-3278

Email: [cdcga@tstt.net.tt](mailto:cdcga@tstt.net.tt)

Ms. Hermia Tyson-Cuffie – Ag. Permanent Secretary

The Division of Culture within the Ministry of Community Development, Culture and Gender Affairs also offers eight-week training courses in Drama at eleven venues throughout Trinidad and Tobago. This course is offered free of charge and relevant course material, along with stationary and refreshments are also provided.

#### **2.4.3.2 Centre for Creative and Festival Arts, Faculty of Humanities and Education, U.W.I.**

Website: <http://www.festival.uwi.tt>

The University of the West Indies, St. Augustine

Tel: 663 – 2222, Fax: 663-9684

Email: [festival@tstt.net.tt](mailto:festival@tstt.net.tt)

Rawle Gibbons – Director

Training is also provided for the drama fraternity at the Centre for Creative and Festival Arts. Certificate programmes are offered specifically for the drama industry through the Practitioner's Certificate in Drama/ Theatre-in-Education as well as in Technical Theatre Production. The Centre also offers undergraduate majors (Bachelor of Arts B.A.) in Theatre Arts – The entry requirements include GCE A' Level subject passes and a B+ average in the Practitioner's Certificate in Drama-in-Education / Theatre-in-Education. The major includes one-semester attachments in the industry.

The Centre also has an outreach programme called ARTS-IN-ACTION in place since 1994, which seeks to extend its work into rural and urban communities and institutions throughout Trinidad and Tobago and the Caribbean region. Estimates based on 1997 figures reveal that Arts-in-Action has conducted over 300 workshops/ performances with some over 25,000 participants ranging from 3 years to the elderly. Activities under this programme include a Theatre in Education (TIE) project, which investigates themes and subjects dealing with a variety of social problems. In 1997 new facilities were being built by the University to house 'The Centre for Creative and Festival Arts'. This new Centre will contain industrial units (factories for pans, carnival costumes, a design centre etc) in addition to serving traditional teaching and research functions. The Centre is at present involved in the Institute of Carnival and research into all aspects of national festivals.

#### **2.4.4 Institutional Framework for the Theatre Industry**

In spite of market setbacks, the National Drama Association of Trinidad and Tobago (NDATT) continues to provide strong institutional support to the local drama fraternity.

##### **2.4.4.1 National Drama Association of Trinidad and Tobago (NDATT)**

Website: [www.ndatt.org](http://www.ndatt.org)

55 Eastern Main Road, St James

Tel: 622 - 6344

Email: [ndatt@drama.org.tt](mailto:ndatt@drama.org.tt)

Mr. Davlin Thomas – President

NDATT is a non-governmental organization, incorporated in 1989, which seeks to inter alia:

- Foster an interest, develop and help facilitate all aspects of the art of drama in Trinidad and Tobago;
- Protect and ensure the freedom of expression for dramatic artists; and
- Promote all aspects of drama

In fulfilling its objectives, NDATT:

- Has compiled and produced a database of member companies, special interest groups, resource personnel and individuals;
- Organizes “Theatre Month” each September, to raise awareness of the dramatic arts and the profiles of the people and organizations involved;
- Publishes a quarterly newsletter, ‘Backstage’, and maintains a website as its primary media of communication;
- Conducts and hosts courses and workshops throughout the year; and,
- Produces the annual Cacique Awards – the only award system in the region which acknowledges excellence in the theatre.

NDATT takes particular interest in professional development of the theatre arts practitioners. In 2004, the Association mounted a theatre production skills workshop, in collaboration with the Ministry of Community Development, Culture and Gender Affairs, to give aspiring and inexperienced technical theatre practitioners the opportunity to interact with seasoned theatre arts professionals through a mentorship programme. Over sixty practitioners in the Best Village genre were tutored in elements of theatre, namely directing, acting, stage management and lighting. The programme required participants to get directly involved in producing one of three plays, and focused on training in directing, acting, lighting and lighting design, and stage management. The Association has organized a five-day festival in 2001 – “the Caribbean Theatre Festival” with assistance from UNESCO. Theatre companies from thirteen different Caricom countries participated in this festival. In addition, NDATT has been responsible for the drama component of the Open School for the Arts Programme with acting and technical workshops in various venues in the country. The organization NDATT continues to lobby for the construction of a national theatre.

#### **2.4.4.2 The Trinidad Theatre Workshop (TTW)**

Website: [www.ttw.org.tt](http://www.ttw.org.tt)

# 23 Jerningham Avenue, Belmont, Port of Spain

Tel: 624 – 8502 Fax: 627 – 8521

Email: [ttw@ttw.org.tt](mailto:ttw@ttw.org.tt) or [trinidad\\_theatre@hotmail.com](mailto:trinidad_theatre@hotmail.com)

Mr. Albert Laveau – Artistic and Managing Director

The Trinidad Theatre Workshop (TTW) also focuses on theatre training, but more so on theatre in education, particularly in the community. The organization sees its primary role as ‘research, training, development, and exposition of all performing arts disciplines considered to be integral to the advancement of the performing arts in Trinidad and Tobago.’ In this regard, TTW hosts a number of professional training workshops, as well as theatre in education programmes that are targeted at schools. The organization also has a social outreach programme in which its theatre-in-education productions are carried to rural communities throughout the country with support from the Ministry of Community Development. TTW intends to carry its theatre-in-education programmes to other islands soon.

#### **2.4.4.3 Secondary Schools Drama Association**

Tel: 655 – 2203 / 655 – 2759

c/o Cowen Hamilton Secondary School, Moruga

President - Victor Edwards

Email: [victoredwards36@hotmail.com](mailto:victoredwards36@hotmail.com)

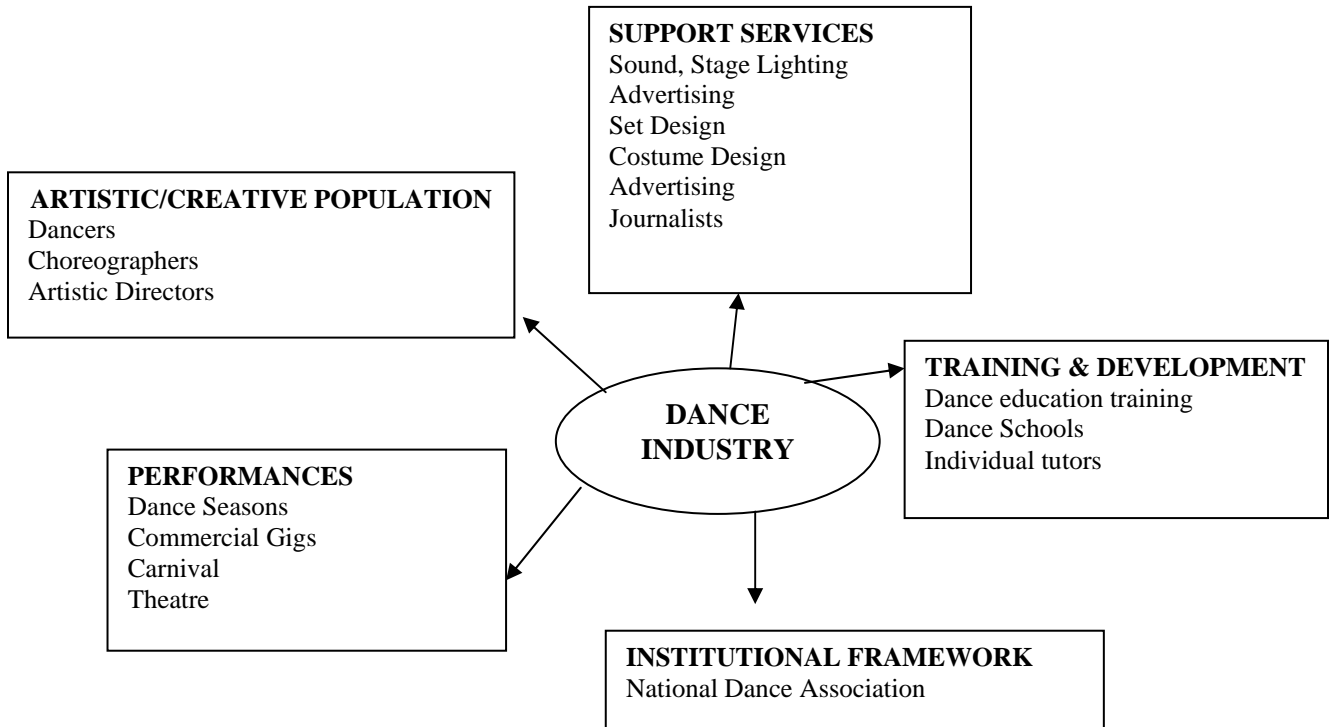
The Secondary Schools Drama Association has been in existence for 40 years and has been responsible for the introduction of theatre arts as an examinable subject on the schools’ curriculum, scholarships in drama and the establishment of a Caribbean schools’ festival.

NGOs such as NDATT and TTW serve a critical role in advancing professional approaches to theatre arts. Both organizations demonstrate an effective blend of creativity and art with the business of theatre in their commitment to the further development of theatre arts in Trinidad and Tobago. It is felt that investment should be made in enhancing the institutional capacity of organizations such as these.

## 2.5 The Dance Industry

The structure of the dance industry can be illustrated in Figure 12 below.

**FIGURE 12: STRUCTURE OF THE DANCE INDUSTRY**



### 2.5.1 Artistic/ Creative Population and Support Services

As an artform, dance has made notable strides in Trinidad and Tobago. This has occurred mainly through: the work of the various dance schools and dance companies; the dedication of the National Dance Association of Trinidad and Tobago; and the perseverance and talent of dance practitioners. Dancers and choreographers from Trinidad and Tobago can be found in some of the renowned professional dance companies across the globe. However, dance locally has not been nurtured to move beyond its success as an artform. To date, commercial activity remains limited to performance and private dance education.



## 2.5.2 Training and Development

“The advancement of the artform, although slow is now cautiously being pursued . . . but more needs to be done. Ministries such as Trade and Industry and Tourism, the corporate community and the Chambers of Commerce should take a more active role in the advancement of dance as an integral component of our heritage.

There are some very fundamental things that are required for dance and dancers that need to be addressed. It is important to provide the necessary environment for our young people if they are to accept dance as a valuable career option. The question of financial equity in line with other artistic forms must also be realized.”

*Hazel Franco, President  
National Dance Association of  
Trinidad and Tobago*

Dance has always been pushed to the back burner of the performing arts as the “hobby”. This mindset is clearly reflected in the national education policy. Dance is yet to be incorporated as a formal subject within the primary school curriculum; and, it is only taught in secondary schools as an option within the CXC theatre curriculum. The case is somewhat the same at the tertiary level where at the University of the West Indies’ Centre for Creative and Festival Arts, dance and dance education are offered at the certificate level within the theatre arts degree programme. Research shows that the current training infrastructure has been able to address the needs of the market to some extent. However the absence of a degree programme limits the opportunity for dancers to further develop their craft as professionals within the domestic environment.

The Division of Culture within the Ministry of Community Development, Culture and Gender Affairs offers eight-week training courses in Indian Dance as well as Ballroom Dance. The course on Indian Dance is offered at two venues. These

courses are offered free of charge as a first step towards developing additional human resource in the art forms. The relevant course material, along with stationary and refreshments are also provided.

There are a number of dance schools that have emerged over the last decade, covering the wide ambit of dance forms. It would appear that many dance schools offer tuition based on global market trends. For example, two of the more popular types of dance training currently available are Latin dance and East Indian classical dance. There are also dance schools that offer training in ballet, folk both African and East Indian, modern and contemporary dance, and ballroom dance (see Table 34). In some instances, dance schools double as dance companies and as such also offer avenues for performance.

**TABLE 33: SURVEY OF DANCE SCHOOLS IN TRINIDAD AND TOBAGO**

Type of Dance School	No. Of Dance Schools
Ballroom dance	1
Ballet	5
Folk dance	23
Indian Dance	24
Latin Dance	2
Contemporary Dance	9

Generally, dance companies in Trinidad and Tobago do not operate as full-fledged, financially viable professional companies. This can be attributed to:

- Limited funding to develop the dance company to full-time professional status;
- Lack of appropriate physical infrastructure to showcase full-scale dance productions that would aid in raising the professional standard of dance, and create opportunities for employment; and,
- Limited opportunities for work, since work stems mainly from theatrical productions; beauty pageants; concerts and shows, which are seasonal and therefore do not provide a consistent source of income for dancers.

### 2.5.3 Performances

While it is evident that dance provides a critical service to many of the cultural industries, this is hardly reflected in the performance fees secured. Industry sources indicate that trained dancers can earn between TT\$400 - TT\$500 for a four minute performance as part of a musical artist’s stage presentation (see Table 35). Choreographers may charge a flat fee of TT\$1,000 for a 4 – 10 minute piece, or TT\$150 per minute, depending on the demand for their skills. In theatre, dancers’ fees are slightly lower, ranging from TT\$150-200 per show if the production has a “long run”, or a flat fee of \$1,000 if the production runs for a weekend to five days. When compared to fees secured in other artistic endeavours, dancers’ fees are considerable lower. In some instances, some dance groups may charge even lower fees in a bid to gain some measure of exposure as a performing act.

**TABLE 34: PERFORMANCE FEE RANGE FOR DANCERS & CHOREOGRAPHERS**

Nature of Performance	Fee Structure (TT\$)	
	Dancer	Choreographer
As part of a stage act	\$400-\$500 (4 mins.)	\$1,000 for 4-10 min. piece
	\$150 per min.	\$150 per min.
In theatrical Productions	\$150-\$200 per show OR	\$150 per min.
	\$1,000 (weekend/5 dy. Production)	--

**Source:** Interview with dance practitioner, 2005.

### 2.5.4 Institutional framework

#### 2.5.4.1 National Dance Association of Trinidad and Tobago (NDA)

P.O. Box 314, Wrightson Road, Port of Spain

Hazel Franco - President

Tel: 628 – 5629 / 663 – 2222 / 662 – 2002 Ext. 3539, Fax: 628 – 5629 / 663 – 2222

One of the objectives of the NDA is to hold festivals, exhibitions, competitions, lectures and classes. The NDA is also charged with establishing a National Dance Theatre Company of Trinidad and Tobago to promote the development of all aspects of dance in Trinidad and Tobago. Lastly, the organization has as one of its objectives to establish a trust fund to provide scholarships and other forms of assistance to its members.

#### **2.5.4.2 Chutney Dancers Association of Trinidad and Tobago (CDATT)**

Tel: 624 – 1024 / 628 – 2174

Ms. Agnes Ragubarsingh

The main objective of the Chutney Dancers Association of Trinidad and Tobago is to recognize and educate chutney dancers. Founding members of the CDATT include Rampersad Ramnarine, Molly Bridgelalsingh, Rajesh Seenath, Vijay Ramlal, Sunita Simboo and Marsha Baksh.

Export opportunities have been somewhat limited. It is known that some top folk dance groups perform primarily in the diasporic markets at cultural shows and festivals. This activity should be encouraged and supported as it can serve as an avenue for artistic development. Touring dance groups can also act as ambassadors of Trinidad and Tobago's culture and in this sense can facilitate exchange programmes with foreign dance groups, which can aid to promote the cultural heritage and cultural industries of Trinidad and Tobago.

### **3.0 Institutional Framework for the Entertainment Industry**

In addition to the organizations mentioned within each of the various sectors of the entertainment industry, there are some organizations which have their responsibilities spread across the entire industry. The Ministry of Community Development, Culture and Gender Affairs is the institution responsible for coordinating the various elements.

#### **3.1 Ministry of Community Development, Culture and Gender Affairs**

ALGICO Building, Jerningham Avenue, Belmont

Tel: 625-3012/ 625-3112, Fax: 625-3278

Email: [cdcga@tstt.net.tt](mailto:cdcga@tstt.net.tt)

Ms. Hermia Tyson-Cuffie – Ag. Permanent Secretary

The Ministry of Community Development, Culture and Gender Affairs is the main institution that facilitates the development of the entertainment industry in terms of research, training and human resource development, finance, marketing and promotion, as well as the provision of relevant infrastructure and facilities. The Ministry is currently preparing a National Cultural Policy, which is intended to provide the framework for the development of the industry. There are monthly meetings held with representatives of all the associations related to the entertainment industry as a means of communication among the institutions. The Ministry also maintains a close relationship with the Division of Culture of the Tobago House of Assembly.

The Ministry provides financing for the industry by providing sponsorship for many of the major national events such as the National Steelband Music Festival, as well as sponsorship for events held by local cultural enterprises and individual artistes, and attendance to international festivals. In addition, the Ministry also provides for both loans and grant funding to facilitate sporting and cultural activities through the Sports and Culture Fund, which was established in 1988 as an incentive for the development of cultural industries.

In addition to these projects mentioned above, there is the Best Village Trophy Competition, which falls under the Division of Community Development.

#### **3.2 Ministry of Finance (MOF)**

Level 8, Eric Williams Finance Building, Independence Square, Port of Spain

Tel: 624 – 6880, Fax: 627 – 6108

The Ministry of Finance contributes towards the development of the entertainment sector through the provision of fiscal incentives. The most significant of these incentives is the Arts and Culture Allowance, which has been legislated through the Corporate Tax Act. Through this incentive, companies can obtain a 150% tax rebate on the expenditures in respect of an artistic work up to a maximum of TT\$1,000,000. The tax incentive is subject to the following criteria:

- Works must be done by nationals of Trinidad and Tobago;

- Works must be an aspect of local art and culture or audio, visual or video production for the purpose for local education or local entertainment or reflecting local culture for radio or television;
- Visual art must be certified by an art gallery, who shall submit an evaluation of the work done;
- Performing arts must be registered with/ certified by the Ministry responsible for Culture or with the Tobago House of Assemble for Tobago nationals;

This fiscal incentive was first introduced in 2001 at a maximum of TT\$300,000. The ceiling was raised to TT\$450,000 in 2002 and again to the current amount of TT\$1,000,000 in 2004. However, to date there remains concerns of the clarity of definitions provided in the Act, which limits the accessibility of this incentive for some companies and entrepreneurs. The Minister of Culture is required to issue a certificate to the cultural enterprise or entity, in order for the organizations to benefit from the incentive. As an interim measure, the Ministry of Culture issues letters of recommendations to the Board of Inland Revenue for the companies to be able to access the rebates.

The National Lotteries Control Board (NLCB), which reports to the Ministry of Finance, also administers a Sports and Culture Fund similar to the one established under the Office of the Prime Minister. This Sports and Culture Fund provided grant financing in the amount of TT\$2.4 million in 2003.

The entertainment industry can also benefit from the tax incentives provided for cultural centers and film making under the Tourism Development Act No. 9 of 2000. Companies can benefit from the following:

- A tax exemption not exceeding 7 years for gains and profits of the project;
- A tax exemption in respect of interest received on an approved loan used for an approved tourism project;
- Importation of entertainment equipment including musical instruments, electronic items and game apparatus free of customs and excise duties as long as they are not manufactured in Trinidad and Tobago in the desired quantities and quality;

The tax incentive is subject to the following criteria:

- The tourism project must be registered and subject to annual inspections;
- Relevant economic statistics must be provided as required;
- The human resources of the Trinidad and Tobago must be engaged as far as possible;
- The project must show linkages to the agricultural, construction, furniture industries and other manufactured goods and services of Trinidad and Tobago; and
- There must be a minimum capital expenditure of TT\$3.1 million for local companies and TT\$6.2 million for foreign companies.

These incentives are provided for the following:

- Activities undertaken by approved tourism projects which includes any project producing feature films and international artistic or sporting events to be broadcast internationally; and
- The construction, furnishing, renovation, refurbishment, expansion and operation of theme parks, cultural centers or other like facility which will create an attraction with international tourism appeal and which will showcase the culture, heritage, history and artistic product of Trinidad and Tobago.

### **3.3 Ministry of Planning and Development - Central Statistical Office**

Website: [www.cso.gov.tt](http://www.cso.gov.tt)

National Statistics Building, 80 Independence Square, Port of Spain

Tel: 623-6495/ 623-7069, Fax: 625-3802

Email: [info@cso.gov.tt](mailto:info@cso.gov.tt)

Clifford Lewis – Ag. Head National Accounts

The Central Statistical Office (CSO) is a division of the Ministry of Planning and Development established in 1952. There are currently 354 staff members and the institution is funded entirely by the Government. It is responsible for taking censuses, collecting, compiling, analyzing and publishing statistical information relating to all social and economic activities of the people of Trinidad and Tobago.

The Mandate of the Central Statistical Office is to facilitate informed decision-making, through the timely provision of a high-quality, relevant, user-oriented and dynamic statistical service and coordinating statistical activities. Although there are numerous projects undertaken every year in Agriculture, Trade, Travel and Economic Indicators, Geographical Information Systems, Tourism, Retail Prices, Population, Social and Vital Statistics and Business Establishment, none are specifically related to the entertainment industry. Projects of the CSO include: Timeliness of the processing of Tourism survey of departing visitors, Developing Indicators for monitoring progress with respect to the Millennium Development Goals as well as the Introduction and Implementation of the United Nations system of National Accounts 1993.

### **3.4 Ministry of Legal Affairs (MOLA) - Intellectual Property Office**

Website: [www.ipo.gov.tt](http://www.ipo.gov.tt)

Ministry of Legal Affairs, 3rd Floor Registration House, 72-74 South Quay, Port of Spain.

Tel: 625 9972 Fax: 624 1221

E-mail: [info@ipo.gov.tt](mailto:info@ipo.gov.tt)

The Intellectual Property Office was established in 1997 and offers the following services among others:

- General information on the various aspects of Intellectual Property;
- Procedural information in respect of the submission of applications for protection;

- Conducting opposition hearings in relation to trademark applications, industrial designs, integrated circuits and new plant varieties;
- Trademark and patent searches; and
- Public awareness seminars.

The organization is a member of the Berne Convention for the Protection of Literary and Artistic Works (1886) since 16 August 1988.

### **3.5 Ministry of Science, Technology and Tertiary Education (MSTTE)**

#### **3.5.1 The College of Science, Technology and Applied Arts of Trinidad and Tobago (COSTAATT)**

Tel: 623 – 4608

Email: [info@costaatt.edu.tt](mailto:info@costaatt.edu.tt)

The College of Science, Technology and Applied Arts of Trinidad and Tobago of The University of Trinidad and Tobago (UTT) also offers an Associate in Applied Science Degree in Visual Communication Design, which is offered as a two-year full time or three-year part time program at the John S. Donaldson Technical Institute. The entry requirements for this programme are 5 O' Levels including Math & English and a portfolio submission.

#### **3.5.2 Retraining Programme**

Website: [www.stte.gov.tt/retraining](http://www.stte.gov.tt/retraining)

Tel: 622 - 9922 Ext. 251/ 622 - 9349, Fax: 622-7640

Email: [retraining@stte.gov.tt](mailto:retraining@stte.gov.tt)

The Retraining Programme targets retrenched or displaced workers between the ages of 30 – 45 years. The programme is executed at various training centers in rural and urban communities throughout the country over twelve week periods. Training is provided in Entertainment as an occupational area, as well as Television and Video Production as a skill. Participants of this programme are required to take 2 compulsory components - Occupational Skills Training and Life Skills Seminars as well as the optional components – Internship, Literacy and Mentorship. A certificate of completion is awarded to trainees who complete a minimum of 80% attendance at the compulsory components. The MSTTE nominates candidates who have achieved competence in these areas to receive the Trinidad and Tobago National Vocational Qualification (TTNVQ) at levels 1 and 2. This qualification is recognized by industry and formal training institutions and provides the basis for employment and further training opportunities.

### **3.5.3 National Training Agency (NTA)**

Website: [www.ntatt.org](http://www.ntatt.org)

Orchard View Plaza, 115 Endeavour Road, Chaguanas

Tel: 672-7107/8/ 672-9942/3, Fax: 672-7109

Email: [ntatt@tstt.net.tt](mailto:ntatt@tstt.net.tt)

Mr. Fazal Karim – Chief Executive Officer

The National Training Agency was established in January 1999. It is an umbrella organization under the aegis of the Ministry of Science and Technology. Its mandate is to coordinate/regulate and monitor technical and vocational education and training (TVET) in Trinidad and Tobago. At present, NTA is supported entirely by State funding. Funding has also been sourced from international agencies and corporate sponsors. Some revenue is also generated from nominal fees, which are attached to NTA's products and services.

Projects worked on annually include Labour Market Surveys, Training Providers Registry, Tracer Study of Secondary School and Career Guidance/Career Fairs. The NTA is currently in the process of data collection for a Labour Market Survey for the Sport and Entertainment Sector. Ongoing projects include the National Apprenticeship Program, Standard Development for Occupation, Multi-Skilled Sector Training (MUST) Program and the Trinidad and Tobago National Vocational Qualifications. Its staff consists of sixty –seventy members.

Their mandate is to ensure that the nation is continually supplied with people who have the competencies required for the world of work and other productive endeavours, through maintaining a comprehensive integrated training system.

### **3.5.4 The University of the West Indies (UWI)**

St. Augustine

Tel: 662 – 2002

At the Postgraduate level, the Master of Telecommunications Regulation and Policy is offered in the Faculty of Engineering (MRP Telecommunications). The Faculty of Humanities and Education offers a Masters degree in Fine Arts (MFA) in Creative Writing (Prose Fiction), as well as Master of Philosophy (M.Phil) and Doctor of Philosophy (PhD) in Cultural Studies.

The Centre for Creative and Festival Arts also offers a postgraduate diploma in Arts and Cultural Enterprise Management (ACEM Programme), which focuses more on the management and entrepreneurial aspects of artistic and cultural resources. The programme is run over two four-week sessions during the June-August period. The entry requirements include a first degree from an approved university OR academic qualifications decided by the university to be equivalent to a first degree. Persons without a background in the arts will be required to take one practical course in the arts during the programme. Also persons without the above qualifications but who may have experience in the field of study, along with their referee reports and academic records may be recommended for admission based on the results of an interview conducted by a Selection Panel of Academic Coordinators



## **3.6 Ministry of Tourism**

51-55 Frederick Street, Port of Spain

Tel: 624-1403/ 4792, Fax: 625-0437

Email: [mintourism@ravett.net](mailto:mintourism@ravett.net)

### **3.6.1 Tourism Development Company (TDC)**

Website: [www.tdc.co.tt](http://www.tdc.co.tt)

# 63 Tragarete Road, Port of Spain

Tel: 628-9427/ 3619/ 622-0541/ 7308/ 1494, Fax: 622-9415

Mr. Vishnu Dhanpaul – Ag. President [vdhanpaul@tdc.co.tt](mailto:vdhanpaul@tdc.co.tt)

The Tourism Development Company was established in July 2005 and is responsible for all aspects of the tourism sector in Trinidad and Tobago including marketing and promotion, as well as establishing and implementing standards for the development and maintenance of tourism infrastructure and amenities.

## **3.7 The Ministry of Trade and Industry**

Website: [www.tradeind.gov.tt](http://www.tradeind.gov.tt)

Riverside Plaza, Besson Street Port of Spain

Tel: 623 – 2931/ 32, Fax: 624 - 9594

Ms. La Shaun Prescott – Industry Specialist, Ext 2129 or D: 625 – 3122,  
[lprescott@tradeind.gov.tt](mailto:lprescott@tradeind.gov.tt)

The Ministry has a key role to play in the country's Vision 2020 goal of diversification away from the dependence on the oil and energy sectors. Acting as the Secretariat for the Prime Minister's Standing Committee on Business Development, which is an advisory committee to Cabinet, the Ministry of Trade and Industry has been responsible for coordination and research towards the preparation of Strategic Plans for seven targeted industries. The Music and Entertainment Industry is one of these industries, with the Film Industry being considered as a separate targeted industry. The Ministry has also provided sponsorship for various initiatives within the entertainment industry including archiving of calypso (Calypso @ Dirty Jim's Project) as well as attendance to international music festivals.

In addition, the Ministry of Trade and Industry has as one of its core objectives, the development of local industry to meet global challenges and to re-engineer enterprises to have a more outward-looking orientation. One of the projects aimed at meeting this goal is the preparation of a National Export Strategy, in which the services sector will also be included, as well as a National Services Policy.

Agencies under the Ministry's portfolio have also contributed towards the development of the entertainment industry:

- Business Development Company Limited (BDC); and
- Tourism and Industrial Development Company of Trinidad and Tobago (TIDCO);

### **3.7.1 Business Development Company Limited (BDC)**

Website: [www.bdc.co.tt](http://www.bdc.co.tt)

151B Charlotte Street, Port of Spain

Tel: 623-5507, Fax: 624-3919/ 625-8126

Email: [info@bdc.co.tt](mailto:info@bdc.co.tt)

Mr. Earle Baccus – President

The Business Development Company Limited (BDC) is a para-statal company, which was established in August 2002 as the successor to the Small Business Development Company. The institution is majority Government-owned (64%) under the Ministry of Trade and Industry and 36% consists of investments by private financial institutions. Their mandate is to improve the sustainability of enterprises by strengthening and modernizing them towards developing more and better enterprises and entrepreneurs. The organization provides access to financing through its loan guarantee programme. In addition, it provides leasing facilities for machinery and equipment through its subsidiary – the Caribbean Leasing Company Limited (CLCL). The BDC is currently focusing on the seven priority sectors listed by the Government – one of these is the Intellectual Property and related services, including training, consulting, contracting, entertainment (music, dance, theatre, etc.) The type of assistance which the BDC offers to this sector includes trade assistance, loan guarantee facilities, Leasing arrangements for commercial equipment, training in technical as well as business areas, and consultancy services. The BDC currently has thirty-seven employees. There are also offices in San Fernando and in Tobago.

### **3.7.2 Tourism and Industrial Development Company of Trinidad and Tobago (TIDCO)**

Website: [www.tidco.co.tt](http://www.tidco.co.tt)

Level 1 Maritime Center, No. 29 Tenth Avenue, Barataria,

Tel: 675 – 7034, Fax: 638-3560

Email: [trade-info@tidco.co.tt](mailto:trade-info@tidco.co.tt)

Mr. Garvin Francis-Lau – Ag. President

The Tourism and Industrial Development Company was registered on December 17, 1993. By Act No. 4 of 1 995, TIDCO absorbed the assets and liabilities of three former agencies set up to encourage the growth of investment, trade and tourism, namely - the Industrial Development Corporation, the Export Development Corporation and the Tourism Development Authority. TIDCO received subventions from the Ministry of Tourism and the Ministry of Trade and Industry. Their objective was to promote investment, trade and tourism in Trinidad and Tobago as well as to facilitate business. TIDCO's responsibilities included:

- Conducting market research and networking to facilitate market access and penetration;
- Advertising in industry magazines;
- Developing sector profiles and outlining sector opportunities including film;
- Developing and implement Niche Product Development Plans
- Developing a framework for cultural tourism

Some of its initiatives include Cultural Promotions, Tourism Promotions and Festival Promotions. As part of Festival Promotions TIDCO assisted in the marketing and promotion of all festivals like Divali, Emancipation, Tobago Heritage Festival, Laventille Steel Band Festival and Carnival. TIDCO also produced a booklet on all festivals of Trinidad and Tobago which highlighted Parang, Divali, Ramleela, Tobago Heritage Festival, Osun River Festival, Emancipation, Hosay, Santa Rosa Carib Festival, Rapso, Tobago Gospel Festival, Carnival and the Bucco Goat Race Festival among others.

Past projects included:

- Provision of financial and other support to events in the music and entertainment industry such as the “Jazz on the Green’s 2005”;
- International Launches of Carnival in Canada and the United States of America;
- Panyard Sensations;
- Promotion of the World Steelband Music Festival in collaboration with PanTrinbago;
- A production of a Carnival Magazine;
- The launching of Caribbean Week in New York which consisted of Steelpan, Calypso, Rapso and Indian Dance;
- Creation of a cultural itinerary for visiting journalists;
- Hosted international celebrities that were imported to promote Carnival; and
- Collaboration with the National Carnival Commission in the designing and creation of booths.

Based on a Cabinet decision taken in 2005, the mandate of TIDCO has been changed slightly whereby its responsibilities relating to the entertainment industry is now limited to providing market intelligence on all the products and services of the manufacturing, industrial and services sectors. It will also update the official website with the country’s promotional material. All responsibilities related to tourism have now been transferred to the newly created Tourism Development Company.

### **3.7.3 The Entertainment Industry Development Export Company – EIDECO**

No Longer in existence

The Entertainment Industry Development Export Company - EIDECO was formerly launched in July 1997. Its Mission Statement: To facilitate, develop and promote Trinidad and Tobago’s entertainment industry with the view of creating job opportunities, earning foreign exchange, building the society’s cultural confidence and advancing national development. The objectives were as follows:

- To promote, market and export entertainment products and services of Trinidad and Tobago;
- To upgrade quality, competitiveness and production capabilities in entertainment products and services;
- To advocate for increased private and public support of the industry;
- To expand the employment opportunities in the industry;
- To stimulate market access and foreign exchange earnings; and

- To promote industrial deepening and technological innovation.

EIDECO's Board of Directors comprised eleven members, including a TIDCO representative. The organization received a total of TT\$302,000 in direct support from TIDCO during the period 1997 - 1999 for salaries and office support. Over the same period, the organization also received indirect support in the form of funding for projects that it undertook on behalf of the industry. It is estimated that this figure could be approximately TT\$250,000.

There are varying views as to why this organization is no longer in existence. Some of the main points identified include the following:

- Limited funding, financed through TIDCO;
- Lack of autonomy of the company;
- Not enough staff members to perform the required work program;
- The institution was not allowed any seed period to become self financing;
- Many stakeholders and the general public were not aware of the company's existence and its services;
- There were charges of mal-administration;

### **3.8 Office of the Prime Minister**

Website: [www.opm.gov.tt](http://www.opm.gov.tt)

Whitehall, Queens Park West, Port of Spain

Tel: 622 – 1625, Fax: 622 – 0055

Email: [opm@ttgov.gov.tt](mailto:opm@ttgov.gov.tt)

The Sports and Culture Fund was established under the Office of the Prime Minister by Act No. 31 of 1988 to provide partial financing through grants and loans for sporting and cultural activities including those related to the visual, performing and literary arts. The objective of the Fund is to facilitate:

- The provision and upgrading of facilities for sporting and cultural activities;
- Competitions, productions and exhibitions, festivals, physical training and coaching, meetings, workshops, seminars and conferences;
- Research and development to determine the feasibility of undertaking projects related to sport and culture; and
- Advanced studies in the field of sport and culture.

As part of the criteria for accessing these funds, the group or organization must have been in existence for at least two years, and individuals must be citizens of Trinidad and Tobago. All applications must be made through the national organization or association promoting the particular activity unless no such national organization or association exists.

### **3.9 Tobago House of Assembly - Division of Culture**

Website: [www.tha.gov.tt](http://www.tha.gov.tt)

Tel: 639 – 2306/ 4453/ 6897/ 3016/ 4441, Fax: 639 – 2306

Cynthia Alfred – Secretary of Culture

The Tobago House of Assembly was established based on the Tobago House of Assembly Act – Act 37 of 1980. Act 40 of the Tobago House of Assembly Act 1996 expanded its powers. Section 25 and 75 of the Act lists its function - the Tobago House of Assembly is responsible for the formulation and implementation of policy in respect of the matters set out in the Fifth schedule.

### **3.10 Caribbean Festival of Arts (CARIFESTA)**

Email: [carifest@caribsurf.com](mailto:carifest@caribsurf.com)

Carifesta, the Caribbean Festival of Culture and Arts, was established in 1972 after Caribbean artists had made a strong representation to West Indian political leaders for the introduction of a cultural festival. The festival was officially started in Guyana. Its mandate is to develop and foster further unity within the countries of Caricom via cultural and art exchange and development of the Caribbean economies primarily via tourism. As the most prestigious of all Caribbean Festivals, CARIFESTA has become a Mecca for artists, folklorists, and exponents of the Arts, writers, filmmakers, musicians, and connoisseurs of great culinary, cultural and artistic treats. CARIFESTA IX is scheduled to take place in Trinidad and Tobago in 2006, while The Bahamas will host CARIFESTA X in 2008.

### **3.11 San Fernando Arts Council**

213 Aquil-Phillip Street, Gopaul Lands, Marabella

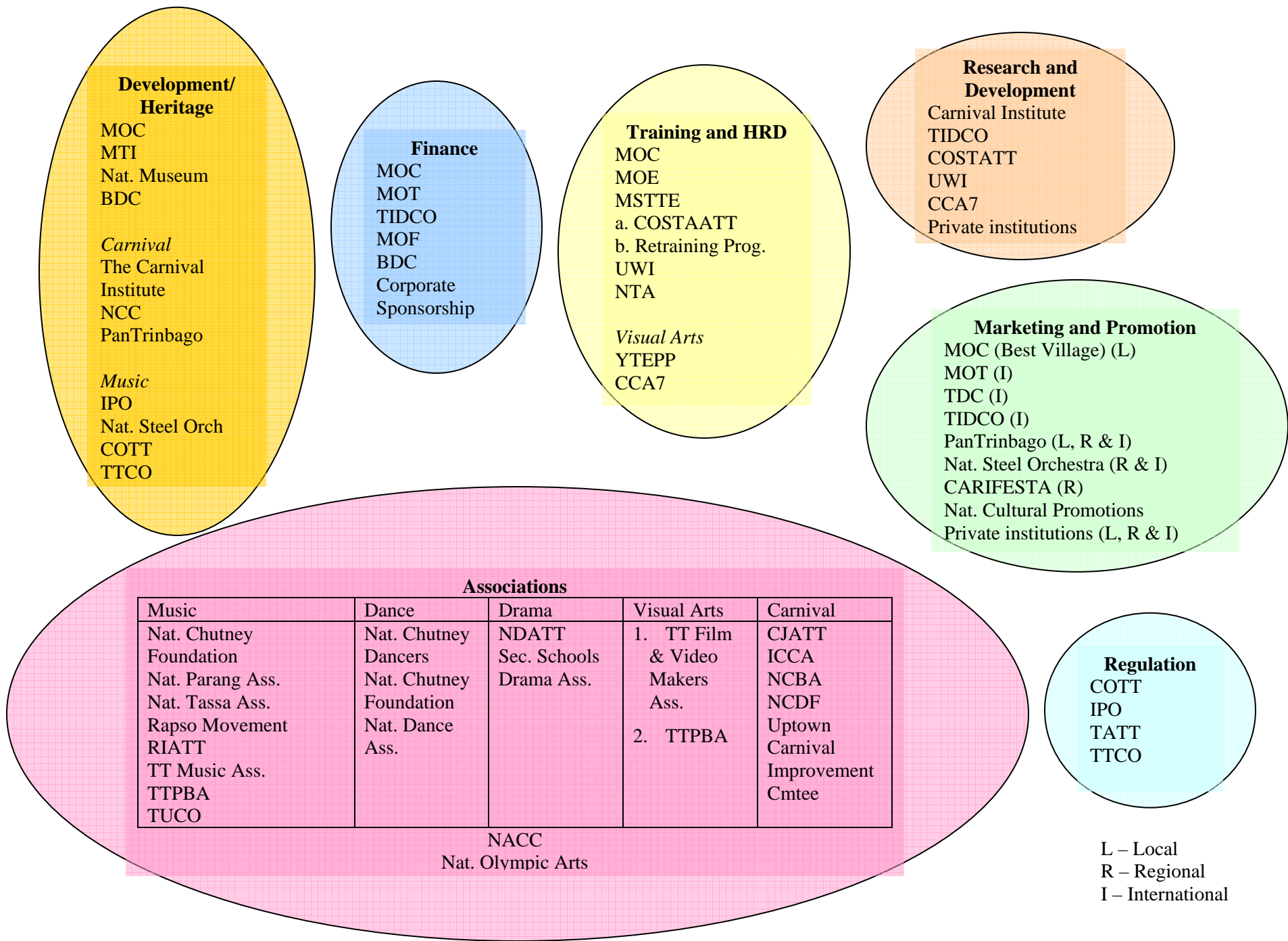
Tel: 658 – 5418 / 658 – 4815, Fax: 658 – 3023

Torrance Mohammed – Chairman

The San Fernando Arts Council was founded in 1969 and incorporated as a non-profit charitable organization in 1973. Its mandate is to foster and promote development of the arts in and around San Fernando and by extension Trinidad and Tobago. Its membership consists of forty groups in dance, drama and music and two hundred individuals as well as the Mayor of San Fernando who is an automatic patron of the Council. The Council was responsible for constructing the Creative Arts Centre in 1989, which was later refurbished by the San Fernando City Council in 2002. Annual initiatives include the annual Sanfest, which was first held in 1970, the National Junior Arts Festival and an annual production of “Gayap” – an Arts magazine. The National Junior Arts Festival provides opportunities for primary and secondary schools in all aspects of the Arts – Performing Arts, Visual Arts and Literary Arts. It has been held every year in October and November for the last three years. “Gayap” – the Council’s art magazine has been in circulation for ten years. In addition, the Council also assists in the development of the Arts by organizing workshops, seminars and lectures. The San Fernando Arts Council is financed in part by

Government financing for Sanfest, through rents received for the Creative Arts Centre for receptions and functions and to some extent by corporate sponsors.

Having described the various sectors of the entertainment industry, it is useful to obtain a holistic view of the institutional framework with respect to the areas of responsibility. The following chart provides a bird's eye view of the role of the various institutions described previously and highlights the breadth of organizations existing to facilitate the development of a healthy entertainment industry. There are also several overlaps in the activities of the various institutions as well as gaps that need to be filled. The proposal for filling these gaps will be outlined in the Strategy Recommendations.



**FIGURE 13: OUTLINE OF INSTITUTIONAL FRAMEWORK OF THE ENTERTAINMENT INDUSTRY**

## 4.0 Economic Analysis of the Entertainment Industry

The Ministry of Trade and Industry as the Secretariat for the Standing Committee on Business Development conducted an Entertainment Industry Survey for the purpose of estimating the revenue and employment generated in the Entertainment Industry as a whole. A purposive sample<sup>45</sup> was done due to the time constraints of conducting the exercise. However, it is recommended that the Central Statistical Office conduct a complete census on the Entertainment Industry.

Both questionnaires and personal interviews were used as the survey instruments. The list of data elements used to guide questioning in telephone interviews is attached at Appendix IV. The questionnaire was sent electronically to 368 stakeholders mainly for the purpose of informing the public that the exercise was being undertaken. The questionnaire was also available for download on the Ministry's Web Site. In an effort to obtain greater coverage, the main Industry Associations were asked to forward the questionnaire to their members. These Associations were also contacted for any information, which may be useful in the analysis. Following this initial contact, telephone interviews were then conducted. Information was also used from the Employee Survey on the Entertainment Industry done by the National Training Agency in 2005, as well as other reports and studies.

In estimating the revenue and employment generated in the Entertainment Industry, attempts were made to capture the following aspects:

- Music – recordings (and recording artistes), performances (and performing artistes), sale of CDs, video production, COTT distributions, training (Music Schools), music concerts, institutions (radio stations, music schools, music stores, COTT, TTCO etc);
- Carnival - Sale of Carnival costumes, Mas camps, Carnival fetes & parties, Carnival competitions, calypso tents, Steel Bands, Steel Pan events, sale of Steel Pans, Institutions (NCC, Carnival Institute, Pan Trinbago, NCBA, NCDF, T&T Steel Orchestra);
- Dance - Dance seasons, corporate performances, training, dance tutors, company members and students, sale of dance merchandise, institutions (NDA);
- Theatre – Productions, training, institutions, practioneers; and
- Visual Art - Sale of artwork, artists, exhibitions, photography, training, art supply retailers/ art and craft stores, institutions

---

<sup>45</sup> A particular sample is selected based on purpose with the intention of retrieving information that will be representative of the industry. A purposive sample targets specific predefined groups of people; in this instance our target were “players” in the entertainment industry.



The survey results showed that the Entertainment Industry is estimated to generate TT\$351.8 million annually and employs some 10,854 persons. These conservative figures provide a snapshot of a moving target as the figures would not remain at this level for very long. The details for the various sectors are shown in the table below.

**TABLE 35: EMPLOYMENT AND REVENUE GENERATED IN THE ENTERTAINMENT INDUSTRY OF TRINIDAD AND TOBAGO**

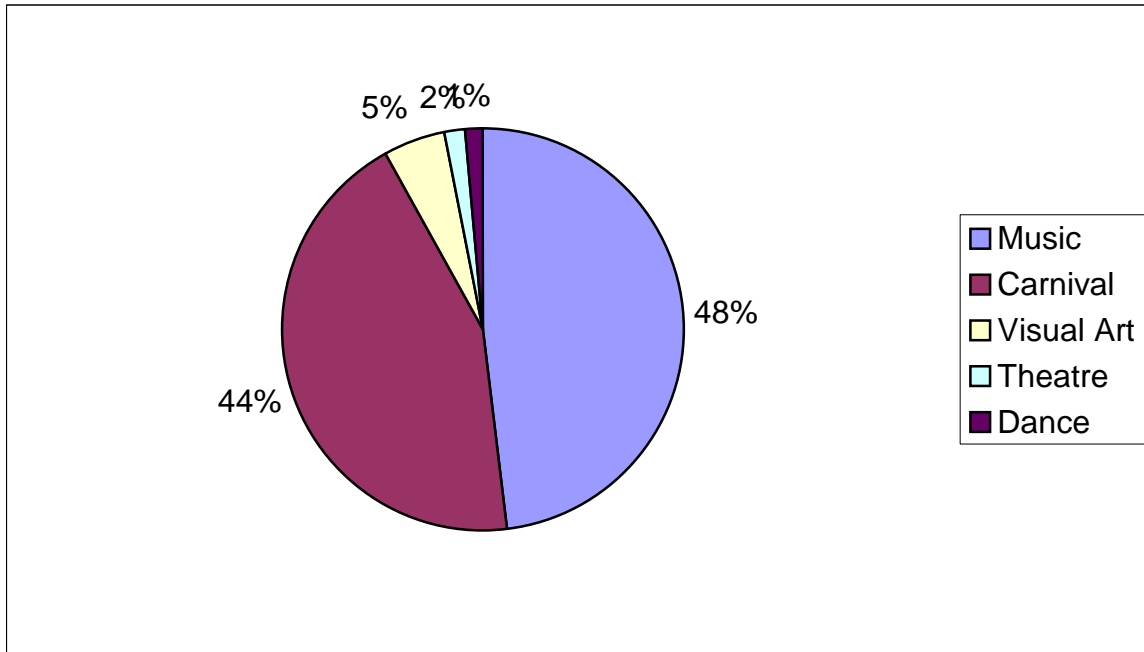
<b>Sector</b>	<b>Employment</b>	<b>Revenue</b>
Music	5,602	\$169,465,606
Carnival	3,596	\$153,587,200
Visual Art	728	\$17,806,450
Theatre	454	\$6,201,140
Dance	474	\$4,704,470
<b><i>TOTAL</i></b>	<b>10,854</b>	<b>\$351,764,866</b>

NOTES:

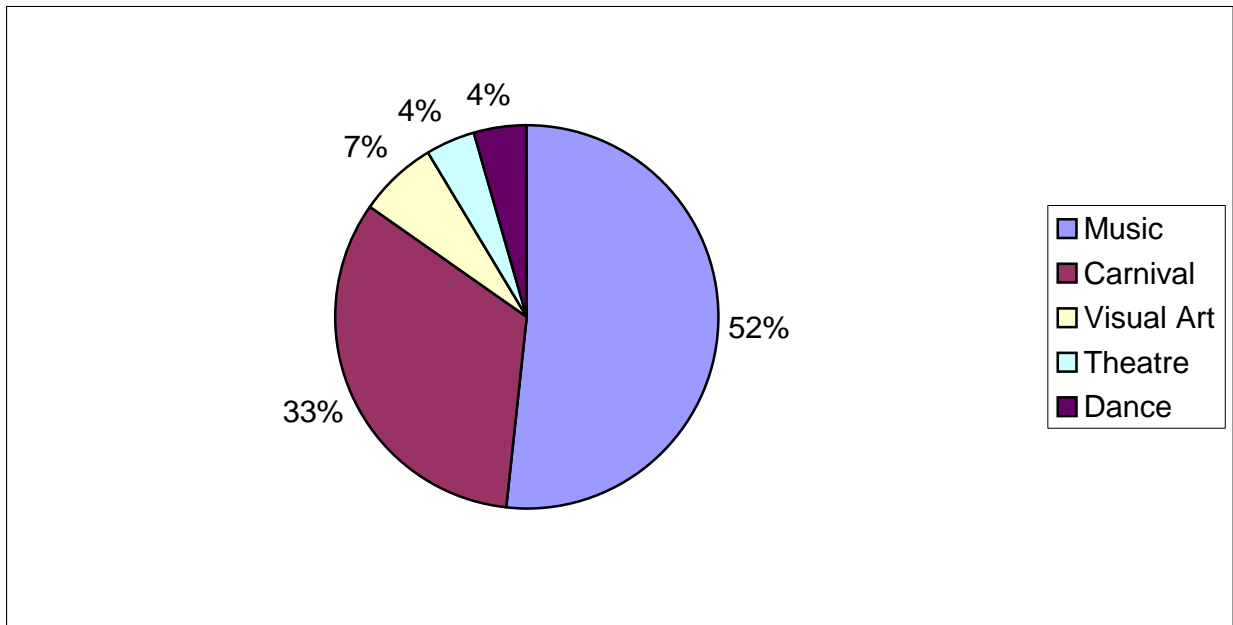
- Music: 244 Students – Indicates level of interest in the sector
- Carnival: Does not include revenue from Carnival competitions, 2 chrome shops and 5 pan schools, nor employment in Carnival event planning, 2 chrome shops and 3 – 4 pan stores. Also 75 students not included in employment for pan sector but the number gives an indication of potential increase.
- Visual Art: Employment in Visual Art sector excludes training institutions. Revenue excludes photography and art supply retailers
- Theatre: Does not include revenue from training and workshops. Employment excludes 525 persons engaged annually working on productions. However this does not indicate employment as the same persons may do more than one event.
- Dance: 268 students in dance – indicates level of interest in sector

The contribution of the various sectors is shown graphically in the following charts. The music and Carnival sectors contribute the majority of both revenues and employment in the industry.

**FIGURE 14: CHART SHOWING REVENUE GENERATED IN THE ENTERTAINMENT INDUSTRY OF TRINIDAD AND TOBAGO**



**FIGURE 15: CHART SHOWING EMPLOYMENT GENERATED IN THE ENTERTAINMENT INDUSTRY OF TRINIDAD AND TOBAGO**



In comparison with the other countries, which were reviewed earlier, the music industry of Trinidad and Tobago has not been as successful as the Jamaican industry:

- Global market US\$40 b;

- Jamaica music industry US\$52.5m;
- Trinidad and Tobago music industry US\$26.9m;
- Barbados music industry US\$15 m; and
- OECS Festival tourism US\$20 million

In comparison with the other industries, which have been targeted for development by the Standing Committee on Business Development, the Entertainment industry compares quite favourable with regard to employment but appears lower in rank for revenue.

**TABLE 36: COMPARISON OF EMPLOYMENT IN TARGETED INDUSTRIES**

<b>Industry</b>	<b>Number Employed</b>
Plastics, Printing and Packaging	11,000
Entertainment	10,854
Food and Beverage	9,452
Fish and Fish Processing	6,054
Merchant Marine	2,970
Yachting	1,250
Film	200

**TABLE 37: COMPARISON OF EMPLOYMENT IN TARGETED INDUSTRIES**

<b>Industry</b>	<b>Revenue Generated TT\$m</b>
Plastics, Printing and Packaging	1,300
Food and Beverage	1,174
Fish and Fish Processing	647.0
Merchant Marine	441.3
Entertainment	351.8
Yachting	152.6
Film	28.0

## 5.0 Strategic Analysis of the Entertainment Industry

### 5.1 General TOWS Analysis of the Entertainment Industry

<b>THREATS</b> Trends within the environment with potential negative impacts	<b>OPPORTUNITIES</b> Environmental trends with potential positive outcomes and returns
<ul style="list-style-type: none"> <li>▪ Misrepresentation by international media of Caribbean culture, which can negatively affect market development abroad</li> <li>▪ Caribbean arts and culture operate on the fringes of global entertainment industries – not regarded as part of global mainstream entertainment</li> <li>▪ Local broadcast media generally neglect local entertainment</li> <li>▪ Weak domestic copyright infrastructure</li> <li>▪ General lack of public sector support for developing the industry</li> <li>▪ Limited access to funding</li> <li>▪ Education system is not geared towards encouraging students to pursue careers in the arts</li> <li>▪ Local market more interested in foreign entertainment</li> </ul>	<ul style="list-style-type: none"> <li>▪ Internet presents new options for production, marketing, distribution and broadcasting of arts and culture e.g. webcasting</li> <li>▪ Proliferation of Caribbean festivals opening up interest of mainstream markets in US and Europe to Caribbean arts and culture</li> <li>▪ Caribbean diaspora are strong advocates of Caribbean arts and culture</li> <li>▪ Liberalization of the local broadcasting sector has allowed for the establishment of radio and television stations that promote local cultural content</li> <li>▪ Government is interested in developing projects that are closely linked with developing the local tourist industry</li> <li>▪ Government’s issuance of a tax break to companies investing up to TT\$1 million in the cultural industries</li> </ul>
<b>WEAKNESSES</b> Areas of relative disadvantage	<b>STRENGTHS</b> Areas of relative and distinctive competence
<ul style="list-style-type: none"> <li>▪ Weak industrial, trade and export facilitation</li> <li>▪ Weak documentation and economic measurement of local entertainment industries</li> <li>▪ Ad-hoc management structures, governance and decision-making</li> <li>▪ Lack of strategic management and strategic marketing competences</li> <li>▪ Unfocussed business and corporate sponsorship strategy</li> <li>▪ Distribution channels weak</li> </ul>	<ul style="list-style-type: none"> <li>▪ Trinidad and Tobago’s arts and culture are regionally and internationally renown</li> <li>▪ Cadre of talented and creative persons in the local entertainment industry</li> <li>▪ Growing interest of artists to develop the sector</li> <li>▪ Export activity occurs in the industries</li> </ul>

## 5.2 TOWS Analysis of the Music Industry

<p style="text-align: center;"><b>THREATS</b> Trends within the environment with potential negative impacts</p>	<p style="text-align: center;"><b>OPPORTUNITIES</b> Environmental trends with potential positive outcomes and returns</p>
<ul style="list-style-type: none"> <li>▪ Increasing competition from Jamaica dancehall music, which is currently generating significant attention in global mainstream markets</li> <li>▪ Local broadcast media generally neglect local music except during Carnival season when soca is predominantly played</li> <li>▪ Piracy</li> <li>▪ Local market more interested in foreign music</li> <li>▪ Popularity of calypso and soca artists limited to fringe radio stations that service diaspora</li> <li>▪ Calypso and other genres are being sidelined by soca with the breakthrough of soca artists Rupee and Kevin Lyttle</li> </ul>	<ul style="list-style-type: none"> <li>▪ Digital music, represents the major option of music consumption in the world market</li> <li>▪ Soca music mixed with other genres such as dancehall and pop is appealing to global market</li> <li>▪ Asia holds potential for the development of chutney music</li> <li>▪ The breakthrough of Kevin Lyttle and Rupee creates buzz in mainstream markets on soca</li> <li>▪ Growing recognition among private sector enterprises of the value of investing in the music industry</li> <li>▪ Grammy category for Soca for 2006 can provide opportunities for promotion in global mainstream markets</li> </ul>
<p style="text-align: center;"><b>WEAKNESSES</b> Areas of relative disadvantage</p>	<p style="text-align: center;"><b>STRENGTHS</b> Areas of relative and distinctive competence</p>
<ul style="list-style-type: none"> <li>▪ Lack of artist professionalism - some artists view the industry as a “hustle”</li> <li>▪ Weak business skills</li> <li>▪ Lack of necessary support services e.g. entertainment lawyers, publicists, artist managers, image developers</li> <li>▪ Lack of succession planning</li> </ul>	<ul style="list-style-type: none"> <li>▪ Music generally well-known and popular in region and diaspora due to Trinidad Carnival and other carnival-type festivals</li> <li>▪ Industry has survived without much support</li> <li>▪ Expanding participation by the youth in various aspects of the music industry</li> <li>▪ Export experience can serve to further develop entire industry’s international competitiveness</li> </ul>

### 5.3 TOWS Analysis of the Carnival Industry<sup>46</sup>

<p style="text-align: center;"><b>THREATS</b> Trends within the environment with potential negative impacts</p>	<p style="text-align: center;"><b>OPPORTUNITIES</b> Environmental trends with potential positive outcomes and returns</p>
<ul style="list-style-type: none"> <li>▪ Trinidad and Tobago carnival has matured and has reached a plateau</li> <li>▪ Consistent investment in carnival is not regarded as a priority by Government</li> <li>▪ Increasing competition from an expanding number of Caribbean and diasporic carnivals</li> <li>▪ Possibility of reduced airlift on account of uncompetitive Caribbean tourism</li> <li>▪ Carnival arts continues to struggle for appropriate performance spaces</li> <li>▪ Misrepresentation by international media of Caribbean culture, can negatively affect market development in potential foreign markets</li> <li>▪ Difficulties in obtaining licenses, waivers and concessions regarding import duties from relevant Ministries</li> </ul>	<ul style="list-style-type: none"> <li>▪ Festival tourism is an expanding share of global tourism industry</li> <li>▪ Large number of Trinidad and Tobago type Carnivals around the world can be used to market Trinidad and Tobago carnival</li> <li>▪ Successful festivals generate healthy return on investment when visitor expenditures and other foreign exchange earnings are compared to the cost of staging the festival</li> <li>▪ Expanding international, diasporic and intra-regional tourism markets</li> <li>▪ Growth of short-break and cultural tourists</li> <li>▪ Rising media interest in carnival arts</li> <li>▪ Carnival arts is becoming a central part of school curriculum in UK diasporic carnival cities</li> </ul>
<p style="text-align: center;"><b>WEAKNESSES</b> Areas of relative disadvantage</p>	<p style="text-align: center;"><b>STRENGTHS</b> Areas of relative and distinctive competence</p>
<ul style="list-style-type: none"> <li>▪ Limited attention to audience needs and media considerations</li> <li>▪ Limited investment in carnival arts development and training</li> <li>▪ Ad-hoc management structures, governance &amp; decision-making</li> <li>▪ Uncoordinated institutional facilitation</li> <li>▪ Lack of strategic management and strategic marketing</li> <li>▪ Unfocussed business and corporate sponsorship strategy</li> </ul>	<ul style="list-style-type: none"> <li>▪ Largest and most well-known Caribbean festival</li> <li>▪ Unique and distinctive carnival arts</li> <li>▪ Deep community and historical roots</li> <li>▪ Market leader among Caribbean and diasporic festivals</li> <li>▪ High return on governmental investment of the festival and creates economic spin-offs</li> <li>▪ High experiential value-added for participants and audiences</li> <li>▪ Bolsters cultural confidence of citizens and generates international appreciation for Caribbean arts and culture</li> <li>▪ Emulation by other Caribbean and diasporic carnivals</li> <li>▪ Encourages participation by the youth</li> <li>▪ Growing of professionalism of carnival arts and artists</li> </ul>

<sup>46</sup> Analysis incorporates the tows matrix developed by Dr. Keith Nurse (2004) “Trinidad and Tobago Carnival: From Event to Industry”, Paper presented to TIDCO-EuroMoney Conference, Port of Spain, Trinidad.

## 5.4 TOWS Analysis of the Visual Arts Sector

<p style="text-align: center;"><b>THREATS</b></p> <p style="text-align: center;">Trends within the environment with potential negative impacts</p>	<p style="text-align: center;"><b>OPPORTUNITIES</b></p> <p style="text-align: center;">Environmental trends with potential positive outcomes and returns</p>
<ul style="list-style-type: none"> <li>▪ Government does not invest in the visual arts sector</li> <li>▪ No existing copyright administrative agencies for visual art in Trinidad ad Tobago</li> <li>▪ Funding for visual arts projects limited; there is no framework in place for visual artists to access funding</li> <li>▪ Easier for local artists to get funding broad to train and study; this can led to brain drain</li> <li>▪ General population does not view visual arts as sustainable form of employment</li> <li>▪ Public perceives original art as exorbitantly priced; this inhibits market expansion</li> <li>▪ Local market flooded by reproductions</li> <li>▪ Current legislation on tax breaks does not accommodate private investors who are the main supporters for art</li> <li>▪ Facilities in schools for art training are below standard</li> </ul>	<ul style="list-style-type: none"> <li>▪ Internet is a growing avenue for distribution and marketing of artwork</li> <li>▪ Global visual art market expanding to encompass design, animation and architecture</li> <li>▪ Growing interest among large companies in investing in visual art</li> <li>▪ Existing tertiary-level curriculum at UWI for training artists and art educators</li> </ul>
<p style="text-align: center;"><b>WEAKNESSES</b></p> <p style="text-align: center;">Areas of relative disadvantage</p>	<p style="text-align: center;"><b>STRENGTHS</b></p> <p style="text-align: center;">Areas of relative and distinctive competence</p>
<ul style="list-style-type: none"> <li>▪ Distribution channels declining – art galleries unable to maintain financial viability</li> <li>▪ Use of internet to market and distribute work is not widespread</li> <li>▪ Limited access to export markets</li> <li>▪ Lack of necessary support services e.g. art critics, art historians, appraisers, installers</li> <li>▪ National museum functions with limited resources</li> <li>▪ Proliferation of tourist-oriented/souvenir art gives market the impression that domestic artwork is limited to one “kind” of art</li> </ul>	<ul style="list-style-type: none"> <li>▪ Cadre of talented and creative persons in the industry</li> <li>▪ Visual art product expanding</li> <li>▪ Visual arts fraternity exhibits frequently in spite of limitations</li> <li>▪ CCA provides the requisite space for training and work</li> <li>▪ Young people have interest in visual art</li> <li>▪ CCA provides forum for foreign artists to work and train in Trinidad and Tobago, which facilitate exchange programmes</li> </ul>

## 5.5 TOWS Analysis of the Performing Arts

<p style="text-align: center;"><b>THREATS</b></p> <p style="text-align: center;">Trends within the environment with potential negative impacts</p>	<p style="text-align: center;"><b>OPPORTUNITIES</b></p> <p style="text-align: center;">Environmental trends with potential positive outcomes and returns</p>
<ul style="list-style-type: none"> <li>▪ Government has not given strong political or economic support to the performing arts</li> <li>▪ Funding limited; there is no framework in place for performing arts practitioners to access funding</li> <li>▪ Private sector support for the performing arts weak</li> <li>▪ General population does not view the performing arts as sustainable form of employment</li> <li>▪ Society lacks a sense of cultural heritage</li> <li>▪ Cable television and cinema are of greater appeal than theatre to the local market</li> <li>▪ Appropriate physical infrastructure for dance non-existent and for theatre very limited</li> <li>▪ Facilities and resources in schools for training in the performing arts are below standard</li> </ul>	<ul style="list-style-type: none"> <li>▪ As educative activities, performing arts can tap into global funding opportunities for performing arts NGOs</li> <li>▪ Existing tertiary-level curriculum at UWI for training in the performing arts</li> <li>▪ Dance is an important creative element in the making of music videos</li> <li>▪ Restructured CARIFESTA can provide a more effective platform for regional exchanges</li> </ul>
<p style="text-align: center;"><b>WEAKNESSES</b></p> <p style="text-align: center;">Areas of relative disadvantage</p>	<p style="text-align: center;"><b>STRENGTHS</b></p> <p style="text-align: center;">Areas of relative and distinctive competence</p>
<ul style="list-style-type: none"> <li>▪ Weak historical documentation of the technical aspects of the performing arts</li> <li>▪ Inability to establish effective artist representation such as unions and guilds</li> <li>▪ Limited access to export markets</li> <li>▪ Lack of necessary support services</li> <li>▪ Performance fees relatively low in the performing arts</li> <li>▪ Lack of dance education specialists</li> </ul>	<ul style="list-style-type: none"> <li>▪ Cadre of talented and creative persons in the industry</li> <li>▪ Abundance of dance schools, dance troupes, and theatrical groups</li> <li>▪ Vibrant performing arts associations</li> <li>▪ Highly trained practitioners in theatre in education</li> </ul>



## **6.0 Strategic Plan for the Entertainment Industry**

### **6.1 Mission**

To build a sustainable, globally competitive entertainment industry.

### **6.2 The Vision**

*Through solid investment and institutional support, we shall foster the growth and development of globally competitive entertainment industry that would: build the cultural confidence of our society; promote sustainable sources of income for our artists and cultural entrepreneurs; and contribute to the growth of our economy.*

### **6.3 Strategy Recommendations**

#### **6.3.1 Establishment of the Trinidad and Tobago Entertainment Company Ltd. (TT ENT)**

The Trinidad and Tobago Entertainment Company Ltd. (TT ENT) will be responsible for facilitating the development of a globally competitive Entertainment Industry (including music, dance, theatre and visual arts). This company will focus on the internationalization of the industry and will be managed by industry experts. The company will work closely with the Ministry of Community Development, Culture and Gender Affairs, the Ministry of Tourism, the Tourism Development Company (TDC) and other relevant agencies. TT ENT will also liaise with the Ministry of Education, the Ministry of Science, Technology and Tertiary Education as well as other training agencies with regard to the provision of training. It is expected that all projects of TT ENT will be on a partnership basis with the private sector, and only part financing will be provided, with the private sector providing the other part. The objectives of TT ENT are as follows:

- To facilitate international exposure of our local entertainers;
- To market and promote the national creativity;
- To ensure that Trinidad and Tobago is identified not only as the home of Steel Pan but also as the home of soca, chutney and calypso;
- To assist local entertainers and artists in accessing funding for projects;
- To facilitate private sector investment both locally and abroad into the entertainment industry; and
- To ensure proper documentation and archiving of our works.

The key projects of TT Ent are outlined below.

### **6.3.2 Revolving Investment Scheme**

A Revolving Investment Scheme will be developed for artists to aid in major projects in market development; music production, video production, theatrical productions and touring, as well as implementation of export plans. Foreign Consultants will be contracted to evaluate the applications to the Scheme in order to ensure objectivity in awarding the funds, as well as to ensure that the quality of the submitted application meets international standards. The artists will be required to repay a percentage of the funds received from the Investment Scheme over a scheduled time frame. As there will be a separate Music Division and a Visual and Performing Arts Division, the Scheme will have separate funds assigned to the various sectors with objective criteria in each sector. For the Music Division, there will be six grants awarded in the first year – four with one of the criteria being that the artiste is signed or about to be signed to a major international label and two will be allocated for emerging artistes. The awards will assist in three main areas – music production, video production and tour support. For the Visual and Performing Arts Division, the awards will target dance, theatre and visual art for local productions (one each) and one in each sector for staging foreign productions or art exhibitions.

### **6.3.3 Familiarization Tours**

The Trinidad and Tobago Entertainment Company Ltd. will facilitate short visits to Trinidad and Tobago for international executives in the music industry to experience local performances by our artistes for possible selection to be signed to a major international label. The company will also hosts visits for local practioneers living and performing abroad for a series of workshops on penetrating the foreign market, as well as for collaborations with local groups in an effort to raise the standard of the performing arts.

### **6.3.4 Archiving, Research and Development**

In order to facilitate continuous assessment of the growth and development of the industry, it would be necessary to conduct research to inform strategic planning, as well as to have proper archiving of our creative works. Attempts will be made to monitor the levels and key areas of employment in the industry, as well as measure the economic contribution of the entertainment industry. In addition, technological advancements in the industry will have to be monitored. One of the first projects of TT Ent with respect to Research and Development will be a study on the commercial viability of chutney music.

### **5.3.5 Marketing and Promotion**

TT Ent will retain the services of a leading expert in the global music industry to aid in establishing global linkages. This individual will have a keen sense of strategic and marketing issues and how they are likely to affect the Trinidad and Tobago music industry. It is expected that this will facilitate knowledge transfer and capacity building by having the local specialists work alongside the foreign expert.

Marketing efforts will also include public awareness media campaigns on the importance of the music industry and encouraging the public to play local music. Seminars will be held targeting

the financial community on funding and investment opportunities in the entertainment industry, as well as on the business of the performing arts.

TT Ent will also seek to purchase airtime on US and UK mainstream broadcast media to showcase the music and music videos of Trinidad and Tobago's artists. In addition, the company will invite international broadcast companies such as BBC and National Geographic to do feature programmes on visual arts and the performing arts.

### **6.3.6 Joint Venture Projects**

The company will also facilitate public – private sector collaboration towards the development of the entertainment industry. One example of this type of joint venture project could be the partnering with the private sector to restart the Mastana Bahar programme. This cultural pageant was instrumental in mobilizing the local artistes of the Indo-trinidadian population, whereby the emphasis would be not only on chutney but also on the other related local artforms in Trinidad such as classical singing and traditional wedding songs.

### **6.3.7 TT Ent Online**

TT ENT Online would have free songbites from the collected archives of our local soca, chutney, calypso and other genres of music and music videos. The internet user would be able to pay per view and pay per download on a song by song basis. Many times, one would buy a CD just for one or two songs on the CD. In this way, it would be more cost effective for the consumer, and the producer, as artistes would no longer have to produce an entire CD. TT ENT Online can therefore attempt to address the problem of piracy. Of course, based on the number of hits, the artist will be paid royalties for his work.

This concept would also be applicable to the visual and performing art sector whereby there can be free clips of plays, as well as a pay per view of the entire production and pay per download. The number of hits can also assist in the market research to see what countries and regions have the highest demand for our products.

## **Music Division**

### **6.3.8 International Music Festivals/ Conferences**

TT Ent will also participate in the leading international and regional music industry trade fairs such as MIDEM on an annual basis. This will not only entail the provision of a Trinidad and Tobago booth for local musicians to promote their work, but will go further in hosting an opening night at the MIDEM with performances by local artistes. The artistes who will be using the Trinidad and Tobago booth for advertising and promotion will be required to cover their own travel and accommodation expenses.

### **6.3.9 International Promotional Music Concert**

The Trinidad and Tobago Entertainment Company Ltd. will facilitate a joint venture project to stage an international music concert to promote the main local artists in targeted locations, such as on the opening night of MIDEM.

## **Visual and Performing Arts Division**

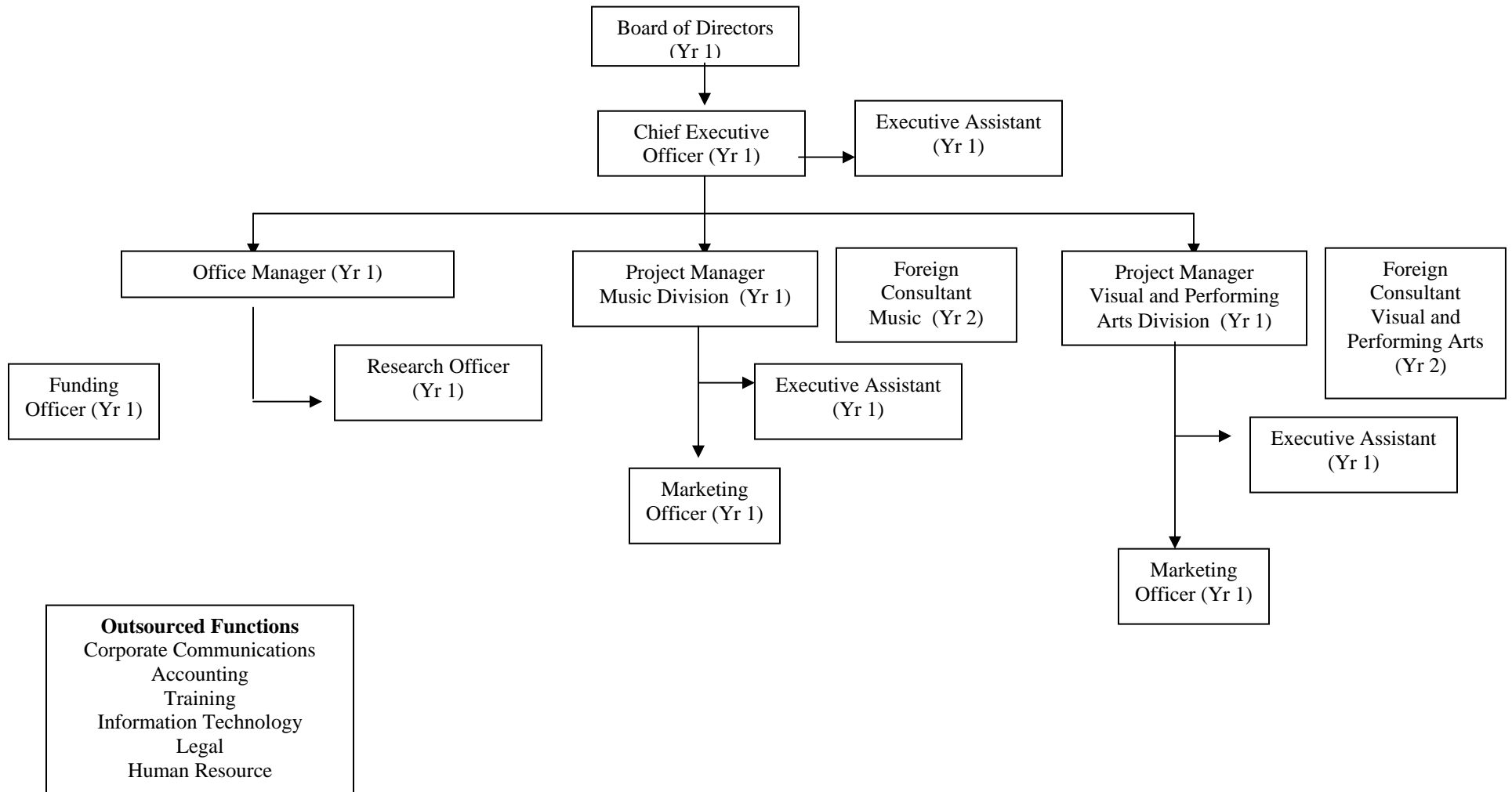
### **6.3.10 Major Theatrical Production**

The Trinidad and Tobago Entertainment Company Ltd. will also facilitate a joint venture project to stage a major theatrical production to showcase our local musicians, dancers, as well as visual artists (set design) to an international audience. This production will be approached similar to a National Theatre Company of Trinidad and Tobago, which will visit various locations abroad to showcase our local talent.

### **6.3.11 Entertainment Directory**

TT Ent will develop of a national database of artistes and cultural entrepreneurs similar to the previous Entertainment Directory produced by TIDCO. This database will also be made available online through the development of relevant IT infrastructure for an on-line directory with links that could facilitate e-commerce transactions.

**FIGURE 16: ORGANIZATIONAL CHART OF THE TRINIDAD AND TOABGO ENTERTAINMENT COMPANY LTD.**



### **6.3.12 Recommended Duties and Responsibilities for Employees of the Trinidad and Tobago Entertainment Company Ltd. (TT Ent)**

#### **Chief Executive Officer**

- Provides the leadership for the realization of the organization's mandate;
- Responsible for economic development of the Entertainment Industry;
- Oversees strategic planning;
- Responsible for optimum resource allocation and supervises senior staff;
- Acts as a liaison for the Government and international community;
- Reports to the Board of Directors on the organization's activities;
- Is an ex-officio member of the Board of Directors;
- Responsible for making a report to the Minister of Trade and Industry on the organization's activities for each year.

#### **Executive Assistants**

- Maintains calendar, makes appointments, opens and answers mail, makes travel arrangements, etc;
- Answers telephones, emails, faxes and forwards these to other staff when appropriate;
- Maintains and updates contacts/ databases;
- Other administrative support.

#### **Consultants**

- Evaluates applications for the Revolving Investment Scheme;
- Makes recommendations on international personnel to invite for familiarization tours to Trinidad and Tobago;
- Does targeted marketing for successful awardees of the Revolving Investment Scheme.

#### **Music Division**

##### **Project Manager**

- Interfaces with Ministries and other Government agencies;
- Liaises with the marketing agency to maintain and develop global linkages;
- Liaises with the Information Technology Company on developing e-commerce strategies for merchandising the local music and music products;
- Coordinates joint venture initiatives with private sector enterprises to promote the music industry abroad;
- Responsible for encouraging the music industry to establish a dispute resolution mechanism for those artists who cannot afford legal advice and representation;
- Acquires and maintains database of local musical works (archives);
- Responsible for renting/ selling archival material.

## **Visual and Performing Arts Division**

### **Project Manager**

- Interfaces with Ministries and other Government agencies;
- Liaises with the marketing agency to maintain and develop global linkages;
- Liaises with the Information Technology Company on developing e-commerce strategies for merchandising the local visual and performing arts;
- Coordinates joint venture initiatives with private sector enterprises to promote the entertainment industry abroad;
- Responsible for encouraging the visual and performing arts to establish a dispute resolution mechanism for those artists who cannot afford legal advice and representation;
- Acquires and maintains database of local visual art, dance and theatre productions (archives);
- Responsible for renting/ selling archival material.

### **Marketing Officers**

- Responsible for development of media campaigns on the importance of the industry as well as campaigns to encourage the public to support local;
- Responsible for securing (purchasing) airtime on mainstream US and UK broadcast media to showcase Trinidad and Tobago's artists;
- Undertakes activities to maintain existing and support new audience development;
- Festivals and Industry Trade Fairs e.g. MIDEM;
- Advertising, Promotion and other public relations;
- Responsible for arranging seminars to facilitate public awareness (financial community, investors, Government officials on negotiations in cultural industries, the artist community on the business of the entertainment industry etc);
- Liaises with the Corporate Communications firm.

### **Office Manager**

- Responsible for employee compensation, benefits and other aspects of staff relations;
- Co-ordinates functions of outsourcing;
- Maintains all office files, including News Clips; Correspondence etc;
- Orders and maintains office supplies.

### **Funding Officer**

- Processes disbursement of grants from the Revolving Investment Scheme;
- Ensures that granting criteria and processes are clear and transparent in collaboration with the Foreign Consultant;
- Acts as liaison with funding agencies locally and internationally;

### **Research Officer**

- Initiates and collaborates in research activities to provide the organization with pertinent data and analysis on issues and trends in the entertainment industry;
- Responsible for the development and measurement of performance indicators to monitor the success of the organization's efforts and the overall success of the entertainment industry;

- Responsible for monitoring the success of grant awardees;
- Monitors technological changes in the industry in collaboration with the Information Technology Specialist;
- Coordinates with the Central Statistical Office and other relevant agencies to conduct a census to determine the levels of employment and key areas of employment in the industry, as well as other data issues;
- Responsible for industry surveys and other research;
- Archives.

### **Outsourced Functions**

#### **Corporate Communications Officer**

- Responsible for media monitoring, and media relations;
- Responsible for the development and implementation of media strategies to ensure that the programs and services of the organization are known and understood by stakeholders, the media and the general public.

#### **Accountant**

- Processes and records all financial transactions;
- Processes payroll;
- Prepares budgets and financial reports (showing distinction between grants, administration and projects);
- Provides advice on resource allocation.

#### **Training Officer**

- Liaises with the National Training Agency to ensure that standards are maintained;
- Provides advice on placements and availability of training;
- Coordinates with the Ministry of Education and the Ministry of Science, Technology and Tertiary Education on curricula development and the provision of scholarships;
- Liaises with the appropriate local and international institutions to facilitate exchange programs, fellowships, apprenticeships, internships and other collaborations;
- Locate successful local artists and artistes living abroad to facilitate advanced practical training courses.

#### **IT Specialist**

- Responsible for website development (Webmaster) and multimedia marketing products;
- Responsible for systems development and maintenance;
- Responsible for acquisition of computer equipment and accessories;
- Provides users with support service;
- Monitors technological changes in the industry in collaboration with the Research Officer.

#### **Legal Specialist**

- Responsible for all contractual arrangements of the organization;
- Responsible for legal aspects of the Revolving Investment Scheme;
- Provides legal advice on other aspects.



**TABLE 38: BUDGET FOR IMPLEMENTATION OF THE STRATEGIC PLAN FOR THE ENTERTAINMENT INDUSTRY**

	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>
<b>Recurrent Expenditure</b>	<b>3,589,400</b>	<b>3,787,260</b>	<b>4,355,349</b>
Staffing	1,524,000	1,752,600	2,015,490
Outsourced Functions	449,000	507,000	583,050
Consultants (6 month contract)	756,000	869,400	999,810
Board of Directors	153,600	176,640	203,136
Equipment	288,000	0	0
Accommodation	360,000	414,000	476,100
Operating Expenses	58,800	67,620	77,763
<b>Projects</b>	<b>5,173,000</b>	<b>7,161,450</b>	<b>8,245,668</b>
<b>Music Division</b>	<b>3,075,000</b>	<b>3,536,250</b>	<b>4,066,688</b>
Revolving Investment Scheme	1,050,000	1,207,500	1,388,625
Familiarization Tours	200,000	230,000	264,500
Music Trade Fairs and Festivals (MIDEM)	600,000	690,000	793,500
Research	250,000	287,500	330,625
International Promotional Music Concert	600,000	690,000	793,500
Project Administration Costs	375,000	431,250	495,938
<b>Visual and Performing Arts Division</b>	<b>1,898,000</b>	<b>3,395,200</b>	<b>3,904,480</b>
Revolving Investment Scheme	1,050,000	1,207,500	1,388,625
Familiarization Tours	200,000	230,000	264,500
Touring Theatrical Production	250,000	1,500,000	1,725,000
Research	50,000	57,500	66,125
Updating of Entertainment Directory	100,000	115,000	132,250
Project Administration Costs	248,000	285,200	327,980
Internal Marketing	200,000	230,000	264,500
<b>Total Expenditure</b>	<b>8,762,400</b>	<b>10,948,710</b>	<b>12,591,017</b>

## 7.0 Conclusion: Why Invest in the Cultural Industries

Government investment and support into the entertainment industry can be justified on several levels:

### **Socio-Cultural:**

- Vibrant cultural industries promote self-worth, build the cultural confidence of the society and promote cohesion.
- Cultural industries encourage innovation and creativity within a society. They build cultural competences to create a set of indigenous skills that are difficult to replicate.
- Cultural industries stimulate regeneration of a location or a region: carnival has created an image of Trinidad and Tobago as one of the trendiest destinations in the Americas. In some quarters, Trinidad and Tobago is regarded as the “entertainment capital” of the English-speaking Caribbean. This perception has positive implications for destination branding and marketing.
- Cultural industries effectively cross-fertilize with levels of education to provide teaching aids and resources for other disciplines; to widen the options for curricula development; and to provide alternative avenues of education and training for the young unemployed.
- Cultural industries reinforce the heritage and cultural fabric of a society, since the underlying skills in any cultural industry are derived from the art, culture and heritage of the country. Raw talent will always be critical to the success of the cultural industries.
- Cultural industries stimulate development of a society’s heritage through the construction of theatres, museums, art galleries and cultural villages.

### **Economic:**

- The cultural industries provide alternative avenues for industrial development, and as such they can broaden the economic base of Trinidad and Tobago.
- Cultural industries generate employment and provide a range of new career options for young people.
- Cultural industries generate foreign exchange through the export of cultural products and services as well as from visitor expenditure during the festival period.
- Cultural industries diversify revenue streams for enterprises and entrepreneurs in supporting sectors.
- Cultural industries stimulate growth directly and indirectly in other sectors of the economy.

**Market-Oriented**

- Cultural industries can enhance the image of Trinidad and Tobago and help to create one of the premier destinations in the world.
- Cultural industries can attract positive media attention to Trinidad and Tobago.
- Cultural industries provide a solid platform for destination marketing.
- Cultural industries can act as a demand-pull for investors to Trinidad and Tobago.

## BIBLIOGRAPHY

Applaud! (2003). "Canadian Music on the World Stage" Vol.1 No.2, February.

Australian Copyright Council (2001) "The Economic Contribution of Australia's Copyright Industries".

Business Development Company (n.d). "Development of the Music Industry in Trinidad and Tobago: Outlines of a Proposal"

Canadian Conference of the Arts (2003). "Canadian Conference of the Arts Strategic Plan 2003-2008."

Caribbean Dance Associations (n.d.) "International Dance Workshop Conference on The Formation of a Regional Dance Association".

Caribbean Export Development Agency (2001). "Remedial Action Needed in the Music Industry", Caribbean Export News, June.

\_\_\_\_\_ (2001) "The Caribbean Music Industry", The Trade Wins: Critical Issues for Business. Vol.1 No. 8.

Cliché, Danielle (2001) "Culture, Governance and Regulation", in Recognizing Culture by Francoise Matarossa (ed.). Department of Canadian Heritage.

Cornford, James (2000) "Cutting Edges in Strange Places: New Media Debates and the Computer and Video Games Industry in the UK", CURDS Discussion Paper 01/1. University of Newcastle Upon Tyne: Centre for Urban and Regional Development Studies.

COTT (2001) "COTT Yearbook". Port of Spain: COTT.

\_\_\_\_\_. (2002) "COTT Yearbook". Port of Spain: COTT.

CSO (2004). "Carnival Report 2004". Port of Spain: CSO.

DCMS (2004) "Creative Industries Economic Estimates, Statistical Bulletin".

Demas, Allison and Ralph Henry (2001). "Entertainment Services with Special References to Music, Mas and the Film and Video Segments". Report prepared for Caricom Trade Project, Caribbean Regional Negotiating Machinery (RNM), Christ Church, Barbados.

Department of Canadian Heritage (2002) "Canadian Content in the 21<sup>st</sup> Century".

Doward, J. and F. Islam (1999) "Gaming Gets Ugly", The Observer, Business 7 February: p. 7.

Doyle, Gillian (2002) Media Economics. London: Sage Publications.

Frith, Simon (1993) "Popular Music and the Local State", in T. Bennett, S. Frith, and L. Gossberg et. al (eds.), Rock and Popular Music: Politics, Policies and Institutions. London: Routledge.

Gans, Herbert J. (1999) Popular Culture & High Culture. New York: Basic Books.

García Canclini, Néstor (2001) "The Dynamics of Global Cultural Industries", in Recognizing Culture by Francoise Matarossa (ed.). Department of Canadian Heritage.

Getz, D. (1997). Event Management and Event Tourism. New York: Cognizant Communication Corp.

Government of Trinidad and Tobago (2004) "The National Policy on Broadcast and the Broadcasting Industry" Ministry of Public Administration and Information.

Grauer, Kit, Don Krug et. al. (2001) "Culture, Education, & Skills for Living", in Recognizing Culture by Francoise Matarossa (ed.). Department of Canadian Heritage.

Greco, Albert N. (1996) "Shaping the Future: Mergers, Acquisitions, and the U.S. Publishing, Communications, and Mass Media Industries, 1990-1995", in Publishing Review Quarterly vol. 12, no. 3: pp.5-16.

Henry, Ralph and Nurse, Keith. 1996. 'The Entertainment Sector of Trinidad and Tobago: Implementing an Export Strategy.' Report prepared for Trinidad and Tobago Industrial Development Corporation, Industry & Trade Division, Port of Spain.

Hesmondhalgh, David (2002) The Cultural Industries. London: Sage Publications.

Howkins, John (2001) The Creative Economy How People Make Money from Ideas. New York: Allen layne/The Penguin Press.

IIPA (2004) "Copyright Industries in the US Economy", Prepared by Stephen E. Siwek Economists Incorporated.

\_\_\_\_\_. (2004) "The Recording Industry Commercial Piracy Report 2004".

ITC/GATS (2004) "Workshop to Promote Fuller Participation of Developing Nations in the GATS", 3-4 May, Geneva, Switzerland.

James, Vanus (ed.) (2001) "The Caribbean Music Industry Database, 2000". A Report Prepared for UNCTAD and WIPO, October.

Joseph, Terry (2004) "Music Giant Hails Bajan, Vincy Soca", Daily Express, Monday August 9.

\_\_\_\_\_ (2004). “Play What You Want: Government Rejects Local Content Quota System for Radio, TV”. Daily Express. January 25.

Kelsey, Jane. 2003. “Lessons from New Zealand: The Saga of the GATS and Local Content Quotas.” Paper for the Conference on Cultural Diversity, Paris 2-4 February.

Khanduja, Vishal (2004) “Omnicom Group Inc. [OMC]”, Henry Fund Research, The University of Iowa Henry B. Tippie School of Management, November 28.

Kolb, Bonita (2000) Marketing Cultural Organizations. Dublin: Oak Tree Press

Kotler, Philip and Joanne Scheff (1997) Standing Room Only Strategies for Marketing the Performing Arts. Boston, Mass.: Harvard Business School Press.

Kozul-Wright, Zeljka and Lloyd Stanbury (1998) “Becoming a Globally Competitive Player: the Case of the Music Industry in Jamaica”. Geneva: UNCTAD, October.

Lewis, Justin (1990). Art Culture and Enterprise the Politics of Art and the Cultural Industries. London: Routledge.

Matarossa, Francoise (2001) “Culture, Economics and Development”, in Recognizing Culture by Francoise Matarossa (ed.). Department of Canadian Heritage.

Ministry of Trade and Industry, Government of Singapore (2003) “Economic Contributions of Singapore’s Creative Industries”, Economic Survey of Singapore First Quarter.

\_\_\_\_\_. (2000) “What is Culture and the Cultural Industries”, CARIFORUM Cultural Administrators Training Programme, Santo Domingo, Dominican Republic, November.

\_\_\_\_\_. (2004) “Trinidad and Tobago Carnival: From Event to Industry”, Paper presented to TIDCO-EuroMoney Conference, Port of Spain, Trinidad.

OAS (2004) “Culture as an Engine for Economic Growth, Employment, and Development”, Second Inter-American Meeting of Ministers of Culture and Highest Appropriate Authorities, Washington D.C.

Pan Trinbago Foundation Board (2005) “Pan – Strategic Plan for Sustainable Development”. Draft for Public Comment.

Park, Heung-Soo (2001) “Cultural Industries: Current Status and Outlook”, Korea.

Perez, Carlotta (2002) Technological Revolutions and Financial Capital The Dynamics of Bubbles and Golden Ages. Mass.: Edward Elger Publishing Inc.

Porter, Michael (1998) The Competitive Advantage of Firms. New York: Schuster.

Ramcharitar, Raymond (2003) “A Home for the Arts Interview with Davlin Thomas”, Daily Express August 22.

Screen Digest (1998) “Interactive Entertainment Software: Rapidly Maturing Market” June 129-136.

The 411 Entertainment (2004). Issue No. 2 Vol. 2 October – November.

The National Dance Association of Trinidad and Tobago. “Proposed Structure of the National Dance Theatre Company”

The Tourism Development Act, 2000.

Trade Wins (2001) “The Caribbean Music Industry”, ol. 1 No. 8.

Trinidad and Tobago Exporter (1999) “Trinidad and Tobago’s Entertainment Sector is Going Places”, No. 7 May.

UNCTAD (2004) “Creative Industries and Development.” United Nations Conference on Trade and Development, Sao Paulo: UNCTAD.

UNCTAD (2001) “Music Industry Workshop”, Third United Nations Conference on the Least Developed Countries Proceedings of the Youth Forum, Brussels Belgium, May.

## **WEBSITES USED**

[www.artsocietytt.org](http://www.artsocietytt.org) The Arts Society of Trinidad and Tobago

[www.bdc.co.tt](http://www.bdc.co.tt) Business Development Company Limited (BDC)

[www.berklee.edu](http://www.berklee.edu) Berklee School of Music

[www.canadianheritage.gc.ca](http://www.canadianheritage.gc.ca) “The Economic Contribution of Copyright Industries to the Canadian Economy”

[www.cari-culture.com](http://www.cari-culture.com) Caribbean Art Dealers

[www.carnaval.com/2004brooklyn\\_carnival.htm](http://www.carnaval.com/2004brooklyn_carnival.htm) “Brooklyn Carnival Economic Impact Study Released”, Hardbeat News Report

[www.caslon.com.au/colsocietiesprofile.htm](http://www.caslon.com.au/colsocietiesprofile.htm), “Caslon Analytics Profile: Copyright Collecting Societies”.

[www.cca7.org](http://www.cca7.org) Caribbean Contemporary Arts

[www.cott.org.tt](http://www.cott.org.tt) Copyright Organization of Trinidad and Tobago. “Copyright”

[www.cso.gov.tt](http://www.cso.gov.tt) Central Statistical Office

[www.culture.gov.uk/creative\\_industries/default.htm](http://www.culture.gov.uk/creative_industries/default.htm) Department of Culture Ministry and Sport, UK “Creative Industries”

[www.the-dma.org/cgi](http://www.the-dma.org/cgi) Direct Marketing Association, “Online Ads May Finally Come of Age”

<http://www.festival.uwi.tt> Centre for Creative and Festival Arts

[www.forbes.com](http://www.forbes.com) “Advertising Heavy Weights Brawl with Mid-tier Rivals” by Adam Pasick

[www.hoovers.com](http://www.hoovers.com) Hoover’s A D&B Company “Fact Sheet”

[www.ipo.gov.tt](http://www.ipo.gov.tt) Intellectual Property Office

[www.itfacts.biz](http://www.itfacts.biz) IT Facts

[www.media-awareness.ca/english/issues](http://www.media-awareness.ca/english/issues) Media Awareness Network

[www.ncbatt.com](http://www.ncbatt.com) National Carnival Bands Association of Trinidad and Tobago

[www.ncctt.org](http://www.ncctt.org) The National Carnival Commission of Trinidad and Tobago (NCC)

[www.ndatt.org](http://www.ndatt.org) National Drama Association of Trinidad and Tobago (NDATT)

[www.ntatt.org](http://www.ntatt.org) National Training Agency (NTA)

[www.opm.gov.tt](http://www.opm.gov.tt) Office of the Prime Minister

[www.pantrnbago.co.tt](http://www.pantrnbago.co.tt) PanTrinbago

[www.pch.gc.ca](http://www.pch.gc.ca) Department of Canadian Heritage.

[www.pwcglobal.com/extweb/ncpressrelease.nsf](http://www.pwcglobal.com/extweb/ncpressrelease.nsf) Price Waterhouse Coopers “Global Entertainment and Media Industry Will Reach \$1.4Trillion in 2007 Despite Weak Economy, defense Spending Increases”

[www.reggae lovers.com/cariculture/culturaldata/overview.htm](http://www.reggae lovers.com/cariculture/culturaldata/overview.htm) CARIFORUM “CARIFORUM Cultural Industries Data”

[www.stte.gov.tt/retraining](http://www.stte.gov.tt/retraining) Retraining Programme

[www.tatt.org.tt](http://www.tatt.org.tt) Telecommunications Authority of Trinidad and Tobago (TATT)



[www.tdc.co.tt](http://www.tdc.co.tt) Tourism Development Company (TDC)

[www.telefilm.gc.ca](http://www.telefilm.gc.ca) Telefilm Canada

[www.tha.gov.tt](http://www.tha.gov.tt) Tobago House of Assembly

[www.tidco.co.tt](http://www.tidco.co.tt) Tourism and Industrial Development Company of Trinidad and Tobago

[www.tradeind.gov.tt](http://www.tradeind.gov.tt) The Ministry of Trade and Industry

[www.ttw.org.tt](http://www.ttw.org.tt) Trinidad Theatre Workshop

[www.tuco.co.tt](http://www.tuco.co.tt) Trinbago Unified Calypsonians Organization (TUCO)

[www.rapsofest.com](http://www.rapsofest.com) Rapso Movement of Trinidad and Tobago

[www.unesco.org/culturelink/culpol/canada.html](http://www.unesco.org/culturelink/culpol/canada.html) “Canada” by Danielle Cliche and Terrence Cowl (2001)

[www.unesco.org/culture/industries/trade/html\\_eng](http://www.unesco.org/culture/industries/trade/html_eng) UNESCO “Culture, Trade and Globalization”

[www.wto.org](http://www.wto.org) World Trade Organization

[www.ytepp.gov.tt](http://www.ytepp.gov.tt) Youth Training and Employment Partnership Programme (YTEPP)

# **Appendices**

## **I. Persons Consulted**

Richard Aching

Senior Examiner (Technical), Intellectual Property Office, Ministry of Legal Affairs

Ms. Razia Ali

Director – International Trade and Economic Relations Division, Ministry of Foreign Affairs

Mr. Jack Alexis

Impact Consultant, Caribbean Prestige Foundation

Ms. Cathleen Alexis - Derrick

Administrative Assistant/ Officer in Charge (Work Permits), Ministry of National Security

Mr. Fabien Alfonso

Far Beyond Music Ltd.

Mr. Earl Baccus

Chief Executive Officer, Business Development Company

Mr. Winston Bailey (Shadow)

Calypsonian

Mr. Allan Balfour

Artistic Director, Trinity Dance Theatre of Trinidad and Tobago (TDT)

Mr. Arnum Bankole

National Action Cultural Committee

Mr. Deon Baptiste

Dancer

Mr. Mortima Baptiste

Pan Royale

Ms. Sandra Baptiste-Caruth

Programme Specialist, Poverty and Social Policy, United Nations Development Programme (UNDP)

Mr. John Borely

Sculptor

Mr. Edward Bowen

Education Coordinator/ Artist, Caribbean Contemporary Arts (CCA7)

Mr. Brendan Braithwaite  
Research Assistant, Ministry of Planning and Development

Mr. Christophe Braithwaite  
Events Specialist/ Legal Advisor, Ministry of Community Development, Culture and Gender Affairs

Ms. Vindra Bridgebassie  
Communications Officer, Copyright Organization of Trinidad and Tobago

Mr. Courtney Browne  
Assistant Treasurer/ Member of the Executive Committee, National Carnival Bands Association

Mr. Melville Bryan  
Consultant/ Coordinator - Research and Development, Pan Trinbago

Corey Burnham  
Music Producer and Sound Recording Engineer, GW Music Productions

Mr. Eric Butler  
Cultural Officer, Ministry of Community Development, Culture and Gender Affairs

Mr. Ken Marlon Charles (KMC)  
Soca Artist/Composer/Producer

Senator the Honourable Minister Howard Chin Lee  
Minister of Tourism

Mr. Raymond Choo Kong  
Director, Raymond Choo Kong Productions

Mr. LeRoy Clarke  
Artist/Painter

Mr. Dave Clement  
Senior Statistician, Central Statistical Office

Mr. Christopher Cozier  
Painter (Acrylic)

Mr. Anthony Cummings  
Ag. Assistant Curator, National Museum and Art Gallery

Mrs. Donna De Four  
Industry Specialist, Ministry of Trade and Industry

Mr. Gary De Matas  
Managing Director, Agry-Culture

Ms. Allison Demas  
President, Copyright Organization of Trinidad and Tobago (COTT)

Ms. Natalie Dwarika  
Research Officer, National Training Agency

Mr. Robert Elias  
Calypsonian-Trustee, Trinbago Unified Calypsonian Organization (TUCO)

Ms. Charlotte Elias  
Director, Caribbean Contemporary Arts (CCA7)

Ms. Hazel Franco  
President, National Dance Association of Trinidad and Tobago  
Coordinator, Dance Programme Centre for Creative and Festival Arts, UWI

Mr. Norvan Fullerton  
Programme Manager - Prime Minister's Best Village Trophy Competition  
Ministry of Community Development, Culture and Gender Affairs

Ms. Destra Garcia  
Soca Artist/Band Member, Atlantik

Ms. Margaret Gittens  
Managing Director, Trinity Dance Theatre of Trinidad and Tobago

Ms. Desiree Gobin-Seecharan  
Corporate Secretary, Bankers Association of Trinidad and Tobago

Mr. Kyran Grant  
Manager - Enterprise Development Division, Ministry of Labour and Small and Micro  
Enterprise Development

Ms. Jeuel-Marie Green-Thompson  
Director, J's Entertainment Centre (Dance School)

Mr. Todd Guillick  
The Callaloo Company

Ms. Abigail Hadeed  
Photographer, Visual Concepts Ltd.

Ms. Heather Henderson-Gordon

Manager, Queen's Hall

Ms. Nancy Herrera  
Artistic Director, Metamorphosis Dance Company Caribbean School of Dance

Ms. Stacey Ann Hinds  
Planning Officer I, Ministry of Labour and Small and Micro Enterprise Development

Mr. Wayne Hollingsworth  
Artist

Mr. Junior Howell  
Coordinator – Pan in the Classroom, Ministry of Education

Mr. Basdeo Jaikaran  
Chutney Representative

Ms. Mavis John  
Jazz Singer

Ms. Pettal John  
State Counsel, Office of the Attorney General

Ms. Christine Johnston  
Vice President, National Drama Association of Trinidad and Tobago

Ms. Deborah Joseph  
Research Officer II, Ministry of Tourism

Mr. Eugene Joseph  
Artistic Director, Trinidad Dance Theatre

Mr. Learie Joseph  
Learie's Comedy Marathon

Suzette Julien/ Roger Julien  
Orchestral Society of Trinidad and Tobago

Ms. Mazina Kadir  
Controller, Intellectual Property Office, Ministry of Legal Affairs

Mr. Randall Karim  
Trade Specialist (FTAA), Ministry of Trade and Industry

Mr. Paul Keens Douglas  
Director, Keensdee Production Ltd

Mr. Albert Laveau  
Artistic and Managing Director Trinidad Theatre Workshop

Ms. Edwina Leacock  
Permanent Secretary, Ministry of Trade and Industry

Mr. Michael Legerton  
Ministry of Community Development, Culture and Gender Affairs

Ms. Carlene Lewis  
Artist Manager, KMC

Mr. Vel Lewis  
Curator, National Museum

Mr. Vijay Mahabir  
P.R.O. Producer, Distributor, Manager, Announcer 106FM

Ms. Deborah Maillard  
Actor/ Director

Mr. Clive Maingot  
Owner & Manager, YMG Productions

Mr. Kevin Marajh  
Research Assistant, Ministry of Trade and Industry

Mr. Lutalo Masimba – Brother Resistance  
Rapso Movement of Trinidad and Tobago/ Network Community Organization  
Secretary, Trinbago Unified Calypsonians Organization

Mr. David McKell  
Secretary, National Carnival Development Foundation

Ms. Marva Mc Kenzie  
Singer

Mr. Rafi Mohammed  
Producer of Chutney Events

Mr. Torrance Mohammed  
Chairman, San Fernando Arts Council

Mrs. Elizabeth Montano  
Director, Xtatik Co. Ltd.

Mr. David Mount  
Trinity Dance Theatre of Trinidad and Tobago

Ms. Debra Mount  
Trinity Dance Theatre of Trinidad and Tobago

Mr. Andrew Newallo  
Ministry of Trade and Industry

Mr. Garth Nicholas  
Chief Executive Officer, Garth Nicholas Entertainment

Mr. Aiyegoro Ome  
National Action Cultural Committee

Mr. Ainsworth Ovid  
Curriculum Officer – Arts, Ministry of Education

Mr. Winston Peters  
Calypsonian

Mr. Garvin Pettier  
Ag. Foreign Service Officer II, Ministry of Foreign Affairs

Ms. Camille Pierre  
EDCAM Trade and Investment

Mr. Jagdeo Phagoo  
Composer and Singer

Mrs. Linda Pollard-Lake  
Choreographer, Danse Assemble

Ms. Nadia Portillo  
Student, The University of the West Indies

Mr. Ajeet Praimsingh  
Producer of Chutney Events

Ms. Halcyon Prescott  
Graduate Student, Institute of Business, The University of the West Indies

Mr. Hawthorn Quashie  
Calypsonian, Trinbago Unified Calypsonian Organization (TUCO)

Ms. Agnes Raghoobarsingh  
Secretary, National Chutney Foundation of Trinidad and Tobago

Mr. Ripchand Raghunanan  
Research Specialist, Ministry of Science, Technology and Tertiary Education

Yaseen Rahaman  
Executive Director, Trinidad and Tobago Publishers and Broadcasters Association (TTPBA)

Dr. Vijay Ramlal  
President, National Chutney Foundation of Trinidad and Tobago  
Trinidad and Tobago Copyright Organization

Mr. Tej Ramlogan  
Ag. Director of Culture, Ministry of Community Development, Culture and Gender Affairs

Mr. Heerlal Rampartap  
Composer and Singer

Ms. Elenor Rampersad  
Standards Development Specialist, National Training Agency

Ms. Giselle Rampersad  
Business Analyst - Fast Forward, Ministry of Public Administration and Information

Ms. Dixie Rampersad-Pfister  
Manager – Investment Promotion, Sector and Business Development, TIDCO

Mr. Damian Richardson  
Senior Cultural Officer, Ministry of Community Development, Culture and Gender Affairs

Mr. Emerson Rigault  
Schools Supervisor, Ministry of Education

Ms. Ann Marie Ryce  
Cultural Programme Coordinator, Ministry of Community Development, Culture and Gender Affairs

Mr. Michael Salickram  
Dancer, Owner & Manager Shiv Shakti Dance Group

Mr. Ramesh Sarabjit  
Senior Economist, Ministry of Trade and Industry



Mr. William Sheppard  
Ag. Assistant Divisional Fire Officer, Trinidad and Tobago Fire Service

Ms. Marie Siew  
Marketing Assistant, Caribbean Industrial Research Institute (CARIRI)

Ms. Kemi Sobers  
ABC

Mr. Sager Sookraj  
Chutney Representative

Mr. Ricardo St. Cyr  
Chief Executive Officer, National Entrepreneurship Development Co. Ltd. (NEDCO)

Mr. Nazeer Sultan  
Head - Planning and Organization Design, First Citizens Bank

Mr. Winston Sylvester  
Industry Specialist - Trade and Investment Unit, Tourism and Industrial Development Company of Trinidad and Tobago (TIDCO)

Mr. Peter Telfer  
Ministry of Community Development, Culture and Gender Affairs

Mr. Davlin Thomas  
President, National Drama Association of Trinidad and Tobago

Mr. Fred Thornhill  
Team Leader, Film Industry Team

Mr. Bill Trotman  
Visual Arts Projects Coordinator, Studio 66

Honourable Minister Kenneth Valley  
Minister of Trade and Industry

Ms. Jessie-May Ventour  
Assistant Communications Specialist, Ministry of Trade and Industry

Mr. Terrance Walker  
Advisor to the Minister, Ministry of Trade and Industry

Mr. Dave Williams  
Choreographer

Mr. Eugene Williams  
Business Consultant, Venture Capital Incentive Programme

Senator the Honourable Minister Joan Yuille Williams  
Minister of Community Development, Culture and Gender Affairs

Mr. Auburn Wiltshire  
Steelbands Development Officer, Ministry of Community Development, Culture and Gender Affairs

Ms. Carol Wolfe  
The National Carnival Commission of Trinidad and Tobago (NCC)

## **II. Report on the Stakeholders' Meeting on the Music and Entertainment Industry of Trinidad and Tobago**

Tuesday 15<sup>th</sup> March 2005  
The Normandie Hotel

### **Introduction**

On Tuesday 15<sup>th</sup> March 2005, the Ministry of Trade and Industry convened a stakeholders meeting on the entertainment sector of Trinidad and Tobago. A list of the participants is attached.

The objectives of the consultation were to:

- Present the Draft Strategic Plan for the Music and Entertainment of Trinidad and Tobago;
- Reiterate the Government's commitment to further development in the sector;
- Obtain assistance from Government agencies and the private sector in identifying any limitations in implementing recommendations.

### **Opening Remarks**

Mr. Kenny Phillips – Team Leader of the Music and Entertainment Industry Team welcomed distinguished guests and participants to the consultation. He then introduced the feature speaker - the Honourable Kenneth Valley, Minister of Trade and Industry.

### **Feature Address**

The Honourable Minister of Trade and Industry Mr. Kenneth Valley began by stating that this is the series of seven stakeholder consultations, which the Ministry of Trade and Industry is embarking upon this year. These consultations are for those industries, which were selected by the Prime Minister's Standing Committee on Business Development (SCBD) for study as the Government seeks to go micro in its intervention towards economic diversification. The other industries are Yachting, Merchant Marine, Film, Printing and Packaging; Food and Beverage and Fish and Fish Processing. The Minister noted that the report on the Film Industry was presented and accepted by the SCBD will subsequently be forwarded to Cabinet for approval.

In closing, he extended thanks to the members of the Music and Entertainment Industry Team (MEIT) for their diligent work, as well as the entertainment industry stakeholders for their willingness to participate in this important endeavor in order to provide an input in the team's recommendations.

### **Presentation of the "Strategic Plan for the Development of the Music and Entertainment Industry of Trinidad and Tobago" by Ms. La Shaun Prescott**

Ms. La Shaun Prescott, Industrial Specialist at the Ministry of Trade and Industry presented the "Draft Strategic Plan of the Music and Entertainment Industry". She pointed out that the MEIT, after analyzing the available reports, decided that sufficient research on dance, theater, visual arts and carnival arts was not done. A consultant was therefore contracted to gather the necessary

information in these areas. A brief S.W.O.T. analysis was done within the presentation to highlight the strengths Trinidad and Tobago has in the developing this industry.

### Suggestions

1. Focus is more on analyzing music and entertainment as it exists in Trinidad and Tobago and there is a need for analysis, as it exists in the world;
2. A need to have our own means of production locally, instead of having to rely of international producers to make our arts and or songs a success, marketing our products abroad;
3. To have creative control and not to be influenced creatively by the holders of finance;
4. Try and overcome the private sector's ignorance and highlight their relevance to get into the industry;
5. Government's job is to provide facilities, provide training and education and to facilitate private sector's involvement. Government should not produce shows but give the private sector the funds to do it;
6. Creative people should make art their earnings;
7. Some art will not be commercially viable and it is Government's responsibility to provide money to ensure the sustainability of the art;
8. The document is lacking the reference of other documents before;
9. No mention of Calypso included;
10. Our music has not been marketed;
11. Put all top of the line arts and products together, travel throughout Europe and the U.S to promote and lift this industry;
12. Grammy awards are external promotion of the artists, a need for local awards so that winners can be admired by the local citizens;
13. Need legislation to protect artists from digital era;
14. Include the financial sector, need to be tougher on local content;
15. Need to mobilize artists;
16. Increase tax contribution from oil and gas sectors should be assigned to Music and Entertainment;
17. Retrain personnel in financial industry and use incentives to encourage the provision of finance;
18. Developmental Finance National Foundation for the Arts, budget allocation for the infrastructure to signal to national community and business sector's commitment of Government.

### ***Focus Groups***

After the presentation and the coffee break, the stakeholders were separated into four (4) focus groups: -

- Training and Human Resource;
- Financial and investment;
- Marketing and Promotion; and
- Intellectual Property and Infrastructure and Physical Infrastructure.

➤ **Training and Human Resource**

- Reason for sustainability – training programs in the school’s curriculum, mainly focused on carnival, entertainment, and performance arts from ages 14-25. The curriculum must be put in place to sustain itself globally;
- Already in place – the Ministry of Education Program to start in September. Visual and performance arts;
- Human Recourse development also to be developed;
- Drama and visual arts teachers have graduated from the dance part of theatre arts program;
- Lack of teachers for dance area;
- Scholarships for interested teachers;
- National training: Technology training, Quantity and Quality.
- Dance: physical space is needed for training; in secondary schools facilities for dance and drama.
- Quantity in terms of the teacher product;
- Along with the curriculum, sufficient time for children to be exposed to the arts. Systems must be practical and effective.
- What is required from the industry and what type of training is needed, should be considered.

➤ **Financial and investment;**

- \$50 million TT annually to sell “brand Trinidad and Tobago. Need to pay professors for their time;
- The Bankers Association does not know purpose of this industry or the criteria to give money to the industry as it are not seen as commercially viable;
- Examine mechanism used to promote. Need for community and spiritual art, all art has community value. It is difficult to value the amount needed for each aspect;
- Copy systems that were tried before to get funds. There is a large gap between the artists and the government. There is no policy or direction criteria to get funds, who gets what and how much? ;
- Lack of space and respect;
- Change attitudes of the financial institutes to allocate funds;
- Need for infrastructure so banks will take risk to invest and to recognize this industry as a business entity;
- State what the funds are needed for;
- Government should encourage the lending of funds by giving tax breaks;
- Retrain people in the areas.

➤ **Marketing and Promotion;**

- Market identification and segmentation of markets – Mainstream of Carnival Arts, products, an artists;
- Identify the role of the international and local media;
- Create a well designed distribution channel (for example, e-commerce);
- Try to get artists to accessed to larger labels in the industry;

- Government must play an important role in the marketing of products, because they have the access of funds, the negotiating tools and also may know the people in the business;
- Show the local and foreign people what Trinidad and Tobago has to offer, and don't show them too much of the business in the industry;
- Televised local shows more;
- Provide education and scholarships for future and other interested people. Encourage and expose new graduates to get into the music and entertainment industry;
- Attend both local and foreign festivals to get the exposure needed;
- Government should willingly ask artists how they can help instead the artists asking;
- Develop criteria for artists with potential and proven potential to help these artists.

➤ **Intellectual Property and Infrastructure and Physical Infrastructure**

- A need for a certain amount of rooms to train. Who would advise on how to go about building these facilities;
- Need implementation of recommendations;
- Stake holders must be consulted in initial stages;
- A body to be developed to make recommendations on behalf of the stakeholders;
- Change from multi – purpose facilities, to Purpose – built facilities (theatre, dance, etc.)
- Museum of carnival arts: - existing carnival institutes to be strengthened to enable things such as display, etc. instead of building a museum. Including museum displays, research, etc. (need a physical space and appropriate staffing);
- Need land space for recommendations. Gypsy – 20 acres of land already acquired (recommend where it is to be built);
- Consider institutes at several locations;
- Need to decentralize Carnival;
- Rooms dedicated for also to photographs of costumes with related information;
- Include an estimate of a National Gallery of Arts;
- Sign convention on intangible cultural heritage (music, pan, etc.);
- Committee in Ministry of Legal Affairs working on establishing structure for legality of the steel pan;
- Establish neighboring rights association;
- Include time frames on all recommendations.

**Closing Remarks**

The recommendations were then considered and the Chairman of the team thanked stakeholders for their valuable feedback and the ensured them that their feedback would be included into the Strategic Plan.

**List of Attendees for Entertainment Stakeholders Meeting  
15 March 2005**

<b>Title</b>	<b>First Name</b>	<b>Last Name</b>	<b>Job Title</b>	<b>Company</b>
Senator Joan	the Honourable	Yuille-Williams	Minister of Community Development, Culture and Gender Affairs	Ministry of Community Development, Culture and Gender Affairs
Mr.	Jack	Alexis	Impact Consultant	Caribbean Prestige Foundation
Ms.	Cathleen	Alexis - Derrick	Administrative Assistant/ Officer in Charge (Work Permits)	Ministry of National Security
Mr.	Fabien	Alfonso		
Ms.	Razia	Ali	Director – International Trade and Economic Relations Division	Ministry of Foreign Affairs
Mr.	Deon	Baptiste		
Ms.	Sandra	Baptiste-Caruth	Programme Specialist, Poverty and Social Policy	United Nations Development Programme (UNDP)
Mr.	Edward	Bowen	Artist	Caribbean Contemporary Arts (CCA7)
Mr.	Brendan	Braithwaite	Research Assistant	Ministry of Planning and Development
Ms.	Vindra	Bridgebassie	Communications Officer	Copyright Organisation of Trinidad and Tobago
Mr.	Courtney	Browne	Assistant Treasurer/ Member of the Executive Committee	National Carnival Bands Association
	Melville	Bryan	Consultant/ Co- ordinator - Research and Development	Pan Trinbago
	Corey	Burnham	Music Producer and Sound Recording Engineer	GW Music Productions
Mr.	LeRoy	Clarke	Artist/Painter	Mt. Hope Villas
Mr.	Dave	Clement	Senior Statistician	Central Statistical Office
Mr.	Gary	De Matas	Managing Director	Agry-Culture
Ms.	Natalie	Dwarika	Research Officer	National Training Agency
Mr.	Robert	Elias	Calypsonian-Trustee	Trinbago Unified Calypsonian Organization (TUCO)
Ms.	Hazel	Franco	President	National Dance Association of Trinidad and Toago
Ms.	Denise	Geyette	Manager - Cultural Promotions	Tourism and Industrial Development Company
Ms.	Margaret	Gittens	Managing Diretor	Gittens & Gittens Real Estate Agency

<b>Title</b>	<b>First Name</b>	<b>Last Name</b>	<b>Job Title</b>	<b>Company</b>
Ms.	Desiree	Gobin-Seecharan	Corporate Secretary	Bankers Association of Trinidad and Tobago
Mr.	Kyran	Grant	Manager - Enterprise Development Division	Ministry of Labour and Small and Micro Enterprise Development
Ms.	Jeuel-Marie	Green-Thompson	Director	J's Entertainment Centre (Dance School)
Mr.	Todd	Guillick		The Callaloo Company
Ms.	Nancy	Herrera	Artistic Director	Metamorphosis Dance Company Caribbean School of Dance
Ms.	Stacey Ann	Hinds	Planning Officer I	Ministry of Labour and Small and Micro Enterprise Development
Mr.	Wayne	Hollingsworth	Artist	
Ms.	Annelle	Joachim	Manager - Trade Asdsistance	Business Development Company
Ms.	Mavis	John		
Ms.	Pettal	John	State Counsel	Office of the Attorney General
Ms.	Christine	Johnson	Vice President	National Drama Association of Trinidad and Tobago
Ms.	Deborah	Joseph	Research Officer II	Ministry of Tourism
Mr.	Learie	Joseph		Learie's Comedy Marathon
Mr.	Michael	Legerton		Ministry of Community Development, Culture and Gender Affairs
Mr.	Vel	Lewis	Curator	National Museum
Mr.	Lutalo	Masimba		Rapso Movement of Trinidad and Tobago/ Network Community Organisation
Mrs.	Elizabeth	Montano	Director	Xtatik Ltd.
Mr.	David	Mount		Trinity Dance Theatre c/o William H. Scott Limited
Title	First Name	Last Name	Job Title	Company
Ms.	Debra	Mount		Trinity Dance Theatre c/o William H. Scott Limited
Mr.	Garth	Nicholas	Chief Executive Officer	Garth Nicholas Entertainment
Mr.	Ainsworth	Ovid	Curriculum Officer - Arts	Ministry of Education
Mr.	Winston	Peters	Calypsonian	
Mr.	Garvin	Pettier	Ag Foreign Service Officer II	Ministry of Foreign Affairs
Ms.	Camille	Pierre		EDCAM Trade and Investment
Mrs.	Linda	Pollard-Lake	Choreographer	Danse Assemble
Ms.	Nadia	Portillo	Student	The University of the West Indies
Mr.	Hawthorn	Quashie	Calypsonian	Trinbago Unified Calypsonian Organization (TUCO)



Title	First Name	Last Name	Job Title	Company
Mr.	Ripchand	Raghunanan	Research Specialist	Ministry of Science, Technology and Tertiary Education
	Yaseen	Rahaman	Executive Director	Trinidad and Tobago Publishers and Broadcasters Association (TTPBA)
Ms.	Elenor	Rampersad	Standards Development Specialist	National Training Agency
Ms.	Giselle	Rampersad	Business Analyst - Fast Forward	Ministry of Public Administration and Information
Mr.	Emerson	Rigault	Schools Supervisor	Ministry of Education
Mr.	William	Sheppard	Ag. Assistant Divisional Fire Officer	Trinidad and Tobago Fire Service
Ms.	Marie	Siew	Marketing Assistant	Caribbean Industrial Research Institute (CARIRI)
Mr.	Ricardo	St. Cyr	Chief Executive Officer	National Entrepreneurship Development Co. Ltd. (NEDCO)
Mr.	Nazeer	Sultan	Head - Planning and Organization Design	First Citizens Bank
Mr.	Winston	Sylvester	Industry Specialist - Trade and Investment Unit	Tourism and Industrial Development Company of Trinidad and Tobago (TIDCO)
Ms.	Joanne	Tull	Lecturer – Centre for Creative and Festival Arts	The University of the West Indies
Mr.	Dave	Williams	Choreographer	
Mr.	Eugene	Williams	Business Consultant	Venture Capital Incentive Programme

### **III. Careers in the Entertainment Industry**

#### **Careers in Music**

##### *Contemporary Writing and Production*

Arranger, Producer, Composer, Film Scorer/Composer, Jingle Writer, Songwriter, Transcriber, Copyist, Conductor

##### *Music Business/Management*

Advertising Executive, Booking Agent, Business Manager, Field Merchandiser, Music Publisher, Personal Manager, Professional Manager

##### *Film Scoring*

Film Composer, Music Editor, Music Supervisor/Director, Film Arranger/Adapter, Film Conductor, Synthesis Specialist, Theme Specialist

##### *Jazz Composition*

Jazz Composer, Jingle Writer, Film Scorer/Composer, Arranger (Adaptor), Songwriter, Conductor, Copyist, Educator/Teacher, Transcriber, Editor (print music publishing)

##### *Music Education*

Choir Director, College/Conservatory/University Music Educator, Elementary/Secondary School Music Teacher, Music Supervisor, Private Instructor

##### *Music Production & Engineering*

MIDI Engineering, Music Director, Producer, Program Director, Recording Engineer, Studio Director or Manager

##### *Music Synthesis*

MIDI Technician, Programmer, Music Sequencer, Sound Designer

#### **Other Music-Related Jobs**

##### *Performance*

Vocal/Instrumental Soloist, Session Musician, General Business Musician, Performing Artist, Orchestra/Group Member, Background Vocalist, Floor Show Band

##### *Record Companies*

A&R Administrator, A&R Coordinator, Campus Representative, Consumer Researcher, Director of Publicity, Marketing Representative, Public Relations Counselor, Publicist, Regional Sales Manager

##### *Songwriting*

Composer, Jingle Writer, Lyricist, Producer/Songwriter, Singer/Performing Songwriter, Staff or Freelance Songwriter

##### *Tours/Road Work*

Road Manager, Sound Technician, Tour Coordinator, Tour Publicist

### **Careers in Carnival**

Mas Band Manager, Mas Designer, Costume (other types) Designer, Section Manager, Marketing/PR Specialist, Events Specialist

Tent Manager, Steel Band Manager,

Documentalist/Researcher, Consultant, Lecturer in Carnival Arts, Primary/Secondary Teacher in Carnival Arts, Lecturer in the Business of Carnival, Primary/Secondary School Teacher in the Business of Carnival

Photographer, Journalist, Carnival Supplies Retailer

### **Careers in Dance**

Primary/ Secondary School Teacher, Lecturer, Dance School Administrator, Dance Critic/ Writer, Documentalist

Choreographer, Artistic Director, Costume Designer, Lighting designer, Set Designer, Stage Manager, Administration/ Management

Dance Merchandise Retailer, Dance Journalist, Physical Therapist, Dance Photographer

### **Careers in Visual Art**

Architecture, Landscape Design, Fashion Design, Costume Design, Furniture Design, Industrial Design, Interior Design, Graphic Design, Textile Design, Film, Animation

Illustration, Gallery and Museum Work, Installer, Photography, Historic Restoration, Fine Art Painting, Sculpture. Art Marketer

Primary/Secondary School Teacher, Tertiary Level Teacher, Art Academic, Art Historian, Art Critic, Journalist, Appraiser

### **Careers in Theatre**

Acting Coach, Drama Coach, Animal Talent Coordinator, Script Coach, Primary/Secondary School Teacher, Lecturer, Instructor, Guidance Counsellor, Critic

Costumer, Actor/Actress, Model, Mime, Director, Narrator, Announcer, Playwright, Producer, Art Director, Impersonator, Puppeteer, Magician, Costume Designer, Make-up Artist, Sound Designer, Script Manager, Stunt Person, Stage Manager, Set Designer, Draftsman, Talent Manager, Stand-in

Media Planner, Media Salesperson, Customer Service Manager, Mediator, Mime, Advertising/Marketing Specialist, Agent Movie Theater Manager, Amusement Park Entertainer, Facilities Manager, Negotiator/Mediator, Booking Manager, Broadcast Journalist, Program Assistant, Business Manager, Prop Manager, Casting Director, Lighting Designer, Public Relations Specialist, Communication Technology Specialist, Lighting Operator, Radio/TV Announcer, Copy Writer, Exhibit/Display Designer, Theater Manager, Special Events Coordinator, Talent Scout

## **IV. Data Elements Used to Guide Entertainment Industry Survey**

Response No  
Name of Individual  
Name of company  
Sector  
Aspect of sector  
Contact No  
Email  
Website  
Date  
No of persons employed - FT  
No of persons employed - PT  
Total no of persons employed  
Avg Wage Rate  
Wage Bill - Monthly  
Wage Bill - Annual  
Earnings from production  
Average annual earnings

### **MUSIC**

No of songs recorded per year  
No of songs recorded per year in industry  
Production costs for album  
No of albums per year  
No of compilations per year  
No of songs on CD  
No of CDs produced this year  
No of artistes being represented  
No of international record deals per year  
No of music videos done per year  
Video Production costs  
Cost of Studio Time per hour  
No of hours recording for one song  
Total Cost of Studio Time for song  
Average cost to attend music concert  
No of performances per year  
No of performances - December  
No of performances - January  
No of performances - February  
No of performances - March  
No of performances - Apr - Nov  
Fees charged per performance - average  
Payment to Artists  
Revenue earned from COTT distributions  
COTT Registration Fees

Total COTT Distributions  
No of members  
No of artistes  
DJs  
No of radio stations  
No of Music Bands (Carnival)  
Earnings of music band for Calypso tent  
Earnings of music band for a fete  
Average cost of a legitimate CD  
Average cost of a pirated CD  
Sales of pirated CD's  
Income generated from sale of pirated CDs

## CARNIVAL

No of visitor arrivals  
Average cost of Carnival Fete  
No of fetes attended in season  
Average cost of Calypso Tent  
No of tents attended in season  
Length of time tent runs for (weeks)  
Average cost of jouvert band  
No of persons playing jouvert  
Cost of Carnival Costume  
No of persons playing mas  
No of large bands  
Avg No of masqueraders per band - L  
Avg no of masqueraders for bands - L  
Average cost of costume for large bands  
Revenue from costumes of large bands  
No of medium bands  
Avg No of masqueraders per band - M  
Avg no of masqueraders for bands - M  
Average cost of costume for medium bands  
Revenue from costumes of medium bands  
No of small bands  
Avg No of masqueraders per band - S  
Avg no of masqueraders for bands - S  
Average cost of costume for small bands  
Revenue from costumes of small bands  
No of mini bands  
Avg No of masqueraders per band - Mini  
Avg no of masqueraders for bands - Mini  
Average cost of costume for mini bands  
Revenue from costumes of mini bands  
Total Revenue from sale of costumes  
Average No of masqueraders 2005

Average expenditure per visitor on entertainment (& other)  
Average no of employees in mas camps

#### EVENTS

Prize money  
Music Band  
MCs  
Chorus  
Venue Cleaning  
Rental - Chairs Tents etc  
Decoration/ lighting  
Construction - stages  
Legal Fees  
Office Overhead  
Casual Labour  
Sound

#### PAN

No of Bands  
No of pan men in band  
Total no of pan men in country  
No of persons doing Pan Making (Sinking and Grooving)  
Pan Making Fee  
Revenue from Pan Making  
No of Pan Tuners  
Pan Tuner Fee  
Revenue from Pan Tuning  
No of arrangers  
Arranger fee  
Revenue from Arranging  
No of pans sold locally  
Cost of pan  
Rev from sale of steel pan  
No of pan schools  
Employment in each school

#### BAND LAUNCHES & other Carnival Fetes

Cost of each model  
No of models used  
Cost of pan side  
Sound System  
Bar receipts

#### DANCE

No of Corporate performances  
Fees charged per dancer - corporate gigs

Fee charged for group for corporate performance  
Fees charged per dancer - Seasons  
Average cost of a dance season  
Choreographer Fee  
No of dancers in dance company  
No of workshops  
Cost to attend workshop  
Choreographer's Fee for Master Class/ Workshop  
Guestimate - No of dancers in industry  
No of financial members in NDA

#### DANCE MERCHANDISE

Prices of shoes  
Revenue earned from the sale of shoes  
Prices of leotards  
Revenue earned from the sale of leotards  
Prices of tights  
Revenue earned from the sale of tights  
Total revenue earned from dance merchandise

#### THEATRE

Cost of ticket for Annual Cacique Awards  
No of patrons to Cacique  
Revenue generated from Cacique  
Average cost of a theatre production

#### DANCE & THEATRE

No of productions per year  
No of shows in production (nights)  
Average cost to attend show  
Average no of patrons  
Total production budget  
Rental of Venue - Queen's Hall - one night  
Rental of Venue - Queen's Hall - one week  
Rental of Venue - Queen's Hall Matinee  
Rental of Venue - Central Bank  
Rental of Venue - Other  
Average costume cost per person  
Costuming for production  
Cast Size  
Make Up  
Set Design  
Set construction  
Lighting Designer  
Hanging and focusing of lights

Average Fees of Cast per night - Actors  
Average Fees for script development  
Average Fees for directing  
Stage manager avg cost per night  
Assistant Stage Manager (ASM) cost per night  
Box Office Staff  
Front of House Staff  
Ushers  
Crew avg cost per night  
Musicians  
Musical Design  
Artistic Director  
Musical Director  
Sound Engineer  
Director  
Voice Coach  
Microphones per night  
Photography  
Videography  
Props  
Programmes  
Preparation of tickets  
Royalties  
Advertising  
Bar per night  
Bar Receipts  
Catering  
Transport  
Security  
Licenses and Other Fees  
COTT Fees  
TATT Fees

#### VISUAL ART

Time frame of exhibition (weeks)  
No of pieces in exhibition  
Average price of piece  
Total Exhibition production cost  
Raw Materials per piece  
Entrance Fee to Exhibition  
No of sculptors  
Rental of studio space  
Internet Presence - Annual  
Marketing Techniques  
Annual Membership Fees  
No of galleries



## TRAINING

Cost of training

No of persons registered for training this year

No of classes per week

Annual revenue generated from tuition

## ASSOCIATIONS

No of members in association

Cost of membership application for individuals

Cost of membership application for amateur grps and Production houses

Revenue earned by Association from application fees- Individuals

Revenue earned by Association from application fees

Total Rev earned by applications

Revenue earned by Association from membership dues

Notes