CREATIVE INDUSTRIES STUDY IN THE CARIBBEAN/CRIBBEAN KNOWLEDGE ECONOMY

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Global Entrepreneurship Monitor

CREATIVE INDUSTRIES STUDY IN THE CARIBBEAN

Final Report for Data Analysis and Reporting in Adult Population and National Experts Surveys for Trinidad and Tobago, Barbados, Jamaica, Colombia

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CONTENT

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BACKGROUND AND CONTEXT

The Latin America and Caribbean (LAC) region is a diverse group of countries, both in terms of culture and the nature of their economies. Many of them, however, face daunting development challenges including pervasive crime, unemployment and a serious underdevelopment of its formal private sector. This report focuses on a dynamic, yet, embryonic sector termed 'creative industries' which includes the music, entertainment, audiovisuals, crafts, culinary arts and other related industries in the Caribbean and seeks to respond to the paradox associated with the recognition of the Caribbean as a region with one of the most vibrant cultural environments. Yet it is also a region where the potential of creative industries remains unrealized in terms of economic growth and job creation. While the creative industries in the region have been assessed as an area with relevant potential for indigenous growth, little comparable information is available on the characteristics and the behaviours of creative entrepreneurs and the obstacles and challenges that they face and the policies needed. The work therefore examines the nature of entrepreneurship within the creative industries through the presentation of baseline industry data.

The findings in the report were generated from two main data collection approaches; purposive sampling (experts) and stratified samples of individuals in the four countries: Barbados, Jamaica, Colombia and Trinidad and Tobago. A selected group was sampled in each territory for the adult population survey (individuals). A selection of the leading stakeholders in the respective territories was then selected to participate in the National Experts Survey.

RESEARCH OBJECTIVES

The study intended to unearth provide insights on the following three issues:

- How entrepreneurs in the creative sector perform and what is needed for their further advancement;
- Examination of the underlying factors behind innovation, entrepreneurship and growth;
- Extraction of lessons which are applicable to this emerging industry and those that might be extrapolated to other industries.

THE RESEARCH PROBLEM AND ITS SIGNIFICANCE

Numerous research reports, policy and academic papers have linked the creative industries to important and well-needed 'new' and 'alternative' growth and transformation strategies to reverse the eco-

nomic ill-fortunes of some developing countries, and to propel established economies to even higher degrees of prosperity. While such research studies are important, there is a serious need for research such as this report, which presents and examines exploratory data at the micro-level, informed by the views of actual entrepreneurs in the creative industries. Therefore, the essence of the research problem is concerned with unpacking the entrepreneurial behaviours of agents operating in the creative industries by way of exploratory primary data. Without the benefit of reports such as this, policy makers, government officials, planners and other stakeholders will miss out on the crucial and limiting nuances that other macro-level data driven reports tend to miss.

2

INTERNATIONAL CONTEXT AND LITERATURE

The United Kingdom (UK) was one of the first countries globally that conducted a systematic study of the creative industries in a bid to understand pertinent policy issues that impacted on growth within the sector. Those initiatives in the UK catalysed similar research efforts elsewhere, including in academia. Therefore, a small portion of that voluminous literature is briefly recapped herein to facilitate a nuanced and robust interpretation of the survey data findings.

The notion of creative industries is a contested concept; leading scholars such as Cunningham from the Queensland University Centre of Excellence for Creative Industries and Innovation argue that even the early efforts by the UK's Creative Industries Task Force to map the contours of this industry suffered a serious case of 'arbitrary exclusivity'. That is, the import of what is to be included as part of the creative industries, and what should be excluded passes for more than just academic interest but instead portends significant policy issues.[1]

But the question of what should be included in the creative industries or even whether they are distinct from the cultural industries poses a challenge to efforts at comparing creative industries across international or even regional boundaries. For example, the original Creative Industries Task Force in the UK, in their 1998 Mapping Document included the following as the defined creative sectors: "Advertising, Architecture, Arts and Antique Markets, Crafts, Design, Designer Fashion, Film, Interactive Leisure Software, Music, Television and Radio, Performing Arts, Publishing and Software". But Cunningham and other critics argue that this definition omits some other sectors that are closely aligned.[2] So against this background, one would need to be careful when analysing the creative industries in the UK compared to some other country, on account of potential differences in definition.

The United Nations Conference on Trade and Development (UNCTAD), in its inaugural, and seminal, Creative Economy report defines the creative industries as

> *"the cycles of creation, production and distribution of goods and services that use creativity and intellectual capital as primary inputs. They comprise a set of knowledge-based activities that produce tangible goods and intangible intellectual or artistic services with creative content, economic value and market objectives. Creative industries constitute a vast and heterogeneous field*

1 See, Cunningham, S. 'From Cultural to Creative Industries: Theory, industry and policy implications'http://eprints.qut.edu.au/588/1/cunningham_from.pdf

2 Ibid

dealing with the interplay of various creative activities ranging from traditional arts and crafts, publishing, music, and visual and performing arts to more technology-intensive and services-oriented groups of activities such as film, television and radio broadcasting, new media and design"[3].

These creative industries exist within the overarching creative economy, which represents "the interface among creativity, culture, economics and technology, as expressed in the ability to create and circulate intellectual capital, has the potential to generate income, jobs and export earnings while at the same time promoting social inclusion, cultural diversity, and human development" (Hogeschool voor de Kunsten Utrecht, 2010).

In the European Union, the creative and cultural industries are being integrated prominently in the Lisbon Strategy that outlines the pathway for renewed and sustainable growth and development in Europe. In 2009, that year was dedicated in Europe as the "European Year of Creativity and Innovation" and complemented by a comprehensive green paper titled "Unlocking the potential of the cultural and creative industries". Similarly the UNCTAD influential report 'The Creative Economy', 2010 version was presented on the very last vestiges of the global economic crisis in the preceding years. The report observes how inadequate traditional industries and reliance on pure market mechanisms have been in creating sustainable economic growth. Consequently, by building on the foundation report of 2008, the 2010 report advances the considered view that the creative industries provide a very solid and robust pillar for development in both developed and developing countries.

Is it useful to distinguish between 'an entrepreneur' and 'a creative entrepreneur'? The literature suggests a tension between the cultural motivation of creative entrepreneurs to protect their artefacts and semiotics and the economic pull to monetise creative output. But, beyond just the sentimental issue at play, creative entrepreneurs, more than other entrepreneurs in other parts of the economy, face an even greater tension between the pull of the market and the urge to experiment and to perfect their creative output. It is against this background that Brandellero and Kloosterman (2010) explores whether there may be different institutional requirements or interventions in the creative and cultural sectors to manage this fundamental tension.(Brandellero & Kloosterman, 2010).

The problem of placing an economic value on creative industries products/goods is part of an overall problem pertaining to valuing intangibles in finance theory. But, unlike other industries such as pharmaceuticals and software development, the creative industries (such as music, films, crafts etc), are characterized by more uncertainty and unpredictability about the potential financial performance of their products, thereby complicating any effort to ascribe to them any present and future economic value. The kernel of the problem is that many of the creative industries assets have no readily recognizable value in balance sheets.[4]

Research from the Hogeschool voor de Kunsten in the Netherlands provides a useful context against which to the Caribbean and Latin American contexts may be compared. The research from the Netherlands identified six defining themes that influence the performance of creative industries firms. As will be shown in the subsequent data presentation section of the report, those six areas also resonate among the Latin America and Carib-

3 See, http://kulturekonomi.se/uploads/unctad_creativeeconomy_ditc20082cer_en.pdf

4 Promoting investment in the cultural and creative sector: financing needs, trends and opportunities. Report prepared for ECCE Innovation – Nantes Metropole (May 2010) http://www.keanet.eu/docs/access%20to%20finance%20study_final%20report_kea%20june2010.pdf and
European Union Green Paper (2010): Unlocking the potential of cultural and creative industries
http://ec.europa.eu/culture/our-policy-development/doc/Green-Paper_creative_industries_en.pdf

bean respondents in the study. Those six areas of significant influence are:

i. Access to finance

ii. Access to market

iii. Intellectual property rights

iv. Education and training

v. Innovation

vi. Clusters and collaboration

There is a strong perception among cultural and creative industries (CCI) entrepreneurs that access to capital is the most foreboding constraint to the industry; additionally the research project suggests that the limited interface between the cultural/creative industries sector and the financial sector may be a binding constraint on the free flow of capital to these entrepreneurs. The research report also further found that access to intellectual property rights (IPR) advice in the creative industries is low among European CCI entrepreneurs, nor have they used any form of IPR protection; lack of entrepreneurial skills and overall business skills.

Caribbean scholars have also studied the cultural and creative industries in the region. Dunn (2007) brought into sharp focus the role of ICTs and new media in expanding the global reach of Jamaican cultural content, arguing that the continued diffusion of the Internet, in the context of ICT convergence represents a major boon for creative art forms that can be digitized. Other works on the creative industries have identified their significance as important economic pillars; Henry (2007) and Quartesan, Romis and Lanzafame (2007), for instance adduced empirical evidence that the creative and cultural industries are foundational economic and social agents with a defining role in the enterprise development process. Consonant with Henry's view, Dunn & Minto-Coy (2010:20) called for "more effort to capture the region's competitive advantages through providing sustainable linkages between ICTs and creative industries. This would also involve reform of the policy and regulatory framework with respect, for example, to e-commerce, intellectual property and cyber security."

Nurse (2007; 2009) also attempted to locate the creative industries within a broader context of trade, industrial and intellectual property rights policy, thereby implying that the economic potential of the creative industries could only be realised if these interrelated dimensions work in sync and efficaciously.

It is clear that all these research studies have consistently addressed in the creative industries as a homogeneous aggregate phenomenon, which does not give any insights about the specific drivers of innovation, change and creativity within the industries. By extension, neither are issues about entrepreneurship covered by way of primary data collected from the actual agents working in the creative industries. It is these two major and limiting gaps that this research report redresses through the use of exploratory research and data collection methods.

3

METHODOLOGY

Data for this research was gathered using the standard techniques and guides of the Global Entrepreneurship Monitor (GEM). The GEM itself is the largest study of entrepreneurship globally and is therefore regarded as a credible source of data on entrepreneurship across countries. The standardized measures allow for greater comparability and reliability in the data gathered from participating countries.

The data used in the study is collated largely from the National Expert Survey and the Adult Population Survey which used the GEM Model in Jamaica, Trinidad and Tobago, Barbados and Colombia. Data gathering was completed by teams from the following institutions:

- Colombia – Universidad Icesi
- Barbados – Cave Hill School of Business, University of the West Indies
- Jamaica – University of Technology
- Trinidad and Tobago – Arthur Lok Jack Graduate School of Business

Data Analysis was completed by a team from the Mona ICT Policy Centre, Mona School of Business and Management, UWI, Mona

THE NATIONAL EXPERT SURVEY (NES)

The National Expert Survey is a key component of the GEM methodology, which aims to capture entrepreneurial framework conditions in each country or region (Bosma, Wennekers, Amorós, 2012). The number of National Experts Surveyed in each country is as follows:

- Colombia – 48
- Barbados –10
- Trinidad and Tobago -23
- Jamaica - 25

The survey is based on nine criteria administered to at least 36 respondents who are considered experts in the relevant country or region:

Figure 1: GEM's Entrepreneurial Framework Conditions

National experts are asked to provide their perspective on the following key areas which affect entrepreneurship in their country:

- Opportunity perceptions
- Skills for start-up
- Motivation towards entrepreneurship
- Intellectual property legislation
- Support to woman entrepreneurs
- Support to business growth
- Innovation
- Immigration
- Intrapreneurship
- Entrepreneurial networks
- Young entrepreneurs.

THE ADULT POPULATION SURVEY (APS)

The APS is a standardised questionnaire applied to the respective member country on an annual basis. The questionnaire itself was developed by the GEM Consortium and is administered to a sample of the adult population aged 18-64 years.

A stratified sample of individuals in the four countries was surveyed. A selected group was sampled in each territory for the adult population survey (individuals) as follows:

Jamaica	125
Barbados	125
Trinidad and Tobago	100
Colombia	257

A careful process of translation was required in this case. This was essential in applying the questionnaire across the English-Speaking Trinidad and Tobago, Jamaica and Barbados and the Spanish-speaking Colombia. Likewise, some re-translation was also necessary in ensuring synchrony between the two versions of the results.

REVIEW AND ANALYSIS OF EXISTING LITERATURE

Finally, the overall research has also been infor-

med by the 2012 report, *Towards a Caribbean Knowledge Economy: Creative Industries and Entrepreneurship" By Dr Keith Nurse.* This study aimed to gain an insight into the main issues and economic flows affecting the creative industries in three Caribbean countries, namely Barbados, Jamaica and Trinidad and Tobago. This report goes beyond this study, most visibly in the inclusion of Colombia though there is some harmony in the findings and recommendations.

4

BASELINE DATA ANALYSIS: ADULT POPULATION SURVEY

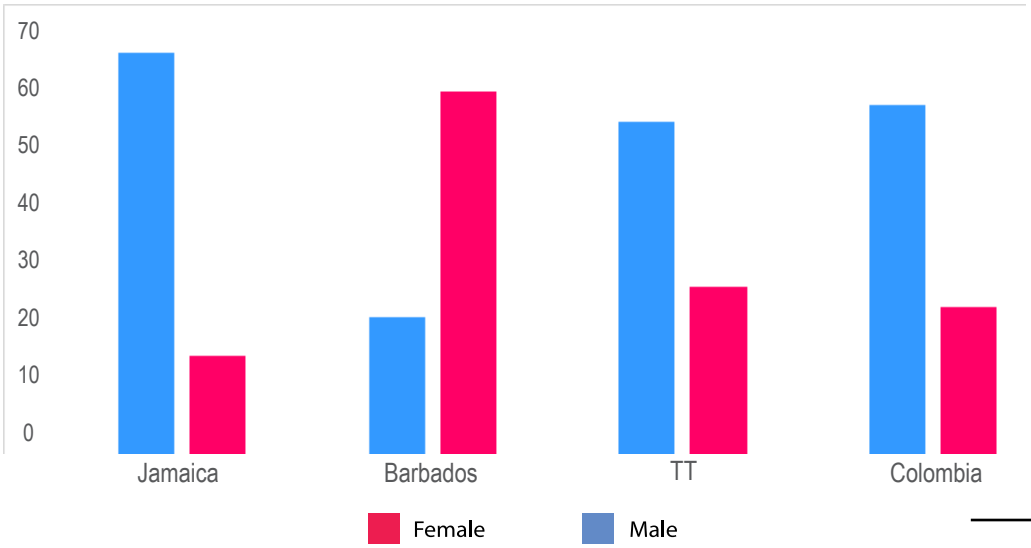
The data results presented in this section of the report were generated from a statistically representative survey among adults in Barbados, Colombia, Jamaica and Trinidad and Tobago, who are knowledgeable about the creative industries. Therefore, stakeholders and decision-makers within the creative industries could enhance their understanding and knowledge about in these important industries through a careful study of the ensuing data results.

BACKGROUND INFORMATION

The data results indicate more men than women make their living in the creative industries in all the countries, but for Barbados.

That more men than females participate in the creative industries is not a unique feature of the Caribbean creative workforce. In many of the more developed countries such as the USA, UK, Australia and New Zealand, men are disproportionately represented in the technical, managerial and central roles. One recent study in the UK found that the underrepresentation of females in the creative labour force is actually lower than the figure for the general economy[5]. Another study indicated that in 2006, of the 250 top grossing feature films in the USA, only 7% and 10% were female directors and writers respectively. In Britain, of the 62 films released in the UK for 2007, only 12.9% were written by female writers and similarly, in Australia in 2006 of the established 93 film directors only 15 were females.

Figure 1: Gender distribution (%)



It appears that the Caribbean region appears to follow a similar trend, given that music, known to be dominated by males, is the dominant creative art form in territories such as Jamaica and Trinidad and Tobago.

Based on Figure 2 below, it appears that most of the creative entrepreneurs in Jamaica are fairly young, with 67.2% of the sample distributed within the broad age range 18-34. Whereas, for the other countries, 35-64 is the likely age group for most of those creative industries entrepreneurs and managers.

The data results further suggest that some small number of respondents in the study have a longstanding involvement in the creative industries either as an employee or as an entrepreneur. In Jamaica the modal value was 10 years of involvement which represented 12% of the sample. Consistent with the age distribution in Jamaica, in all the three other countries entrepreneurs or employees generally had more years of involvement in the creative industries than in Jamaica: the respondents in Colombia had on average 20 years of involvement, which represented 12.1% of the population; 25 years in Trinidad and Tobago which represented 9% of the sample and Barbados respondents had an involvement of either 10 or 20 years, each representing 11.3% of the sample.

Figure 2: Cumulative % of age distribution

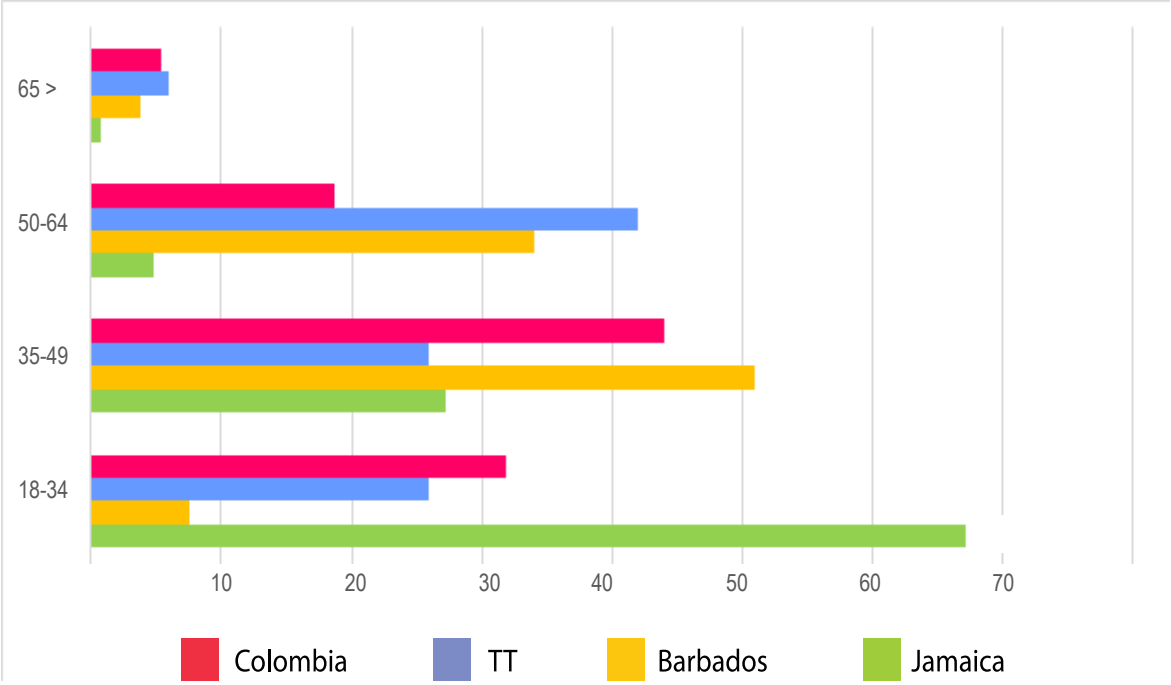


Table 1: Highest academic training achieved (%)

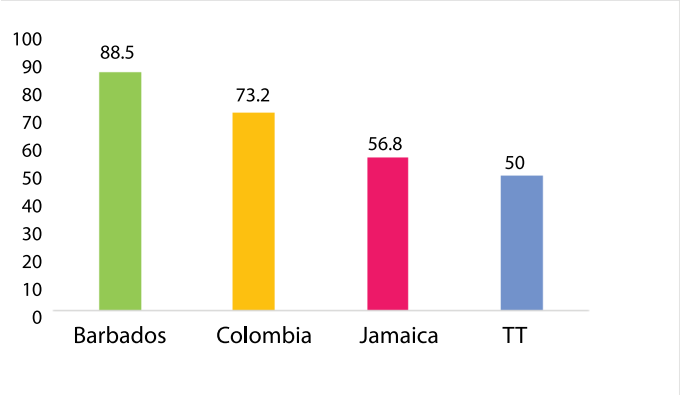
Jamaica		Colombia	
Undergrad degree	43.2	Professional or specialized training	44
High school	21.6	Vocational or technical technical	16.7
Professional or specialized training	16	Post-graduate	16
Vocational or technical	8	Undergraduate	13.5
Barbados		**Trinidad & Tobago**	
High school	35.8	High school	30
Vocational or technical	34	Undergraduate	22
Professional or specialized training	11.3	Elementary	16
Undergrad degree	5.7	Professional or specialized training	11

Table 1 above shows the highest academic training respondents have achieved. It appears that more Colombian creative industries practitioners have undertaken higher level training in comparison to their Caribbean counterparts. However, it appears that more Jamaican and Trinidadian creative industries participants have at least an undergraduate degree.

ENTERPRISE INFORMATION

The data results indicate a high level of formalization among the creative industries practitioners sampled, as the high level of business registration suggests. Figure 3 below indicates the percentages of those respondents who indicated that their businesses are formally registered.

Figure 3: Business registration



There were some common ideas expressed in all the countries except for Barbados pertaining to the non-registration of creative industries businesses. The responses recorded in the data include:

- There is no need to register;
- I'm too busy and don't have the time;
- I'm a freelancer and therefore no need to become formalised;
- There is limited or no administrative support for registration of the business;
- The business is not making enough money as yet therefore there is no need to register;
- The business just got started; and
- Government bureaucracy.

Clearly, it seems, there are some misconceptions among creative industries entrepreneurs about the benefits of formally registering their businesses and also about the appropriate time to register a business.

Most creative enterprises seem to concentrate disproportionately at the level of the value chain called 'creation'. Examples of enterprises at this level include composers, writers, designers, etc.

Figure 4 below shows the breakdown of the value chain participation among creative enterprises.

Figure 4: Participation in creative industries value chain

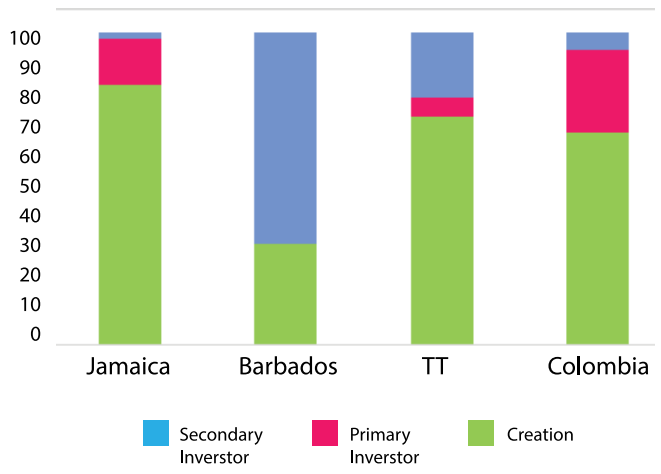


Figure 4 further shows that in Barbados, most creative industries practitioners seem to operate as secondary 'producers' in the value chain. Examples of secondary investors include manufacturers (e.g., CDs), distributors (e.g. imports/exports) and retailers, broadcasters, venue operators etc.

There are creative industries practitioners in at least 20 different fields across the region; however, the depth of participation within those fields varies disparately. So while on a pan-regional basis the level of involvement seems broad, within country boundaries and within some fields, participation is rather low. Table 2 below highlights this point.

Table 2: Percentage involvement in creative industries sectors

Barbados		Jamaica		TT		Colombia	
Performing Arts	7.7	Music	26.4	Audio-visual	13	Audio-visual	14.8
Visual arts	30.2	Audio-visual	8.8	Music	23	Music	24.9
Fashion	30.2	Visual arts	25.6	Performing arts	23	Performing arts	19.1
Jewellery design	43.4	Fashion	10.4	Visual arts	11	Festival & events	9.3
Craft	47.2	Architecture	11.2	Fashion	14	Advertising	7.8
Painting	17	Multimedia	11.2	Craft	18		

Unsurprisingly, music is the main activity for creative industries entrepreneurs in Jamaica, whereas jewellery design is the mainstay for practitioners in Barbados.

Creative industries enterprises do help to reduce unemployment, but at a rather lower or smaller scale compared to more labour intensive industries. During the three year period, 2009 – 2011, Barbados' creative enterprises employed either 1 or 2 workers generally, over the three year period. Similarly, most firms in Trinidad and Tobago also seem to employ 1 or 2 employees. However, the data suggest that upwards of 5 employees are hired on a full time basis in Colombia. Jamaican creative industries entrepreneurs seem to employ workers in the range 1 to 3 employees.

The data suggest that only Colombia (55.5%) has a fairly high number of participants from the creative industries who have undertaken any form of training in managerial and or entrepreneurial courses. On the other hand, only 34.4%, 35.8% and 36% of respondents in Jamaica, Barbados, and Trinidad and Tobago respectively have done similar training.

The data also suggest that individuals who staff creative enterprises in the region are also not exposed to training in several functional areas that are integral to the optimal operations of the enterprises.

Figure 5: Staff training in functional business areas (%)

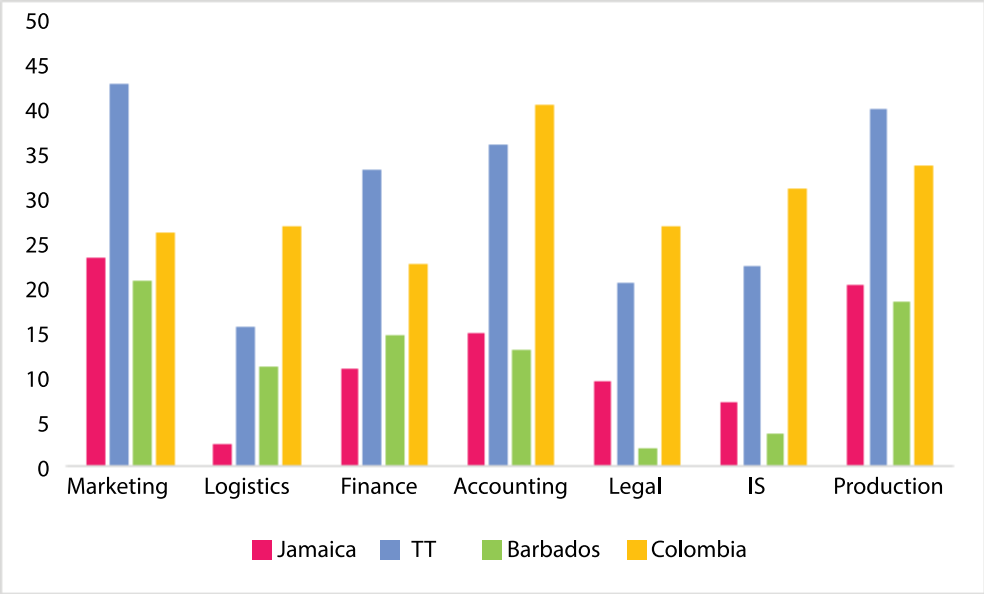


Figure 5 above shows that Colombia and Trinidad and Tobago have the highest proportion of creative enterprises with trained staff members in important functional areas such as information systems (IS), finance, marketing and accounting. But even in these two countries, the numbers seem rather low, with far less than 50% of staff trained in each area. This could be a significant constraint on competitiveness and innovativeness within the sector.

ECONOMIC AND FINANCIAL INFORMATION

It has always been a significant problem for researchers to collect financial information from business enterprises in the Caribbean, particularly those in the micro, small and medium enterprises category. This study also suffered the same limitation, as the response rates for the questions raised regarding enterprise expenditure were very low for all three Caribbean countries. Consequently, there are limitations to making inter or intra country comparisons of enterprise expenditure. Notwithstanding, in Colombia, it appears that entrepreneur's expenditure on their business is generally within the range of 0 - 1,000,000 USD for each of the three years, 2009 - 2011. As an example, among the creative entrepreneurs, 69.6% of their expenditure on 'building' usually fall within the range of USD 0 - 1,000, 000. Similarly, of all expenditures on software in 2009 the modal sum expended, 69.6%, usually fall within the range of USD 0 - 1,000,000.

Table 3: Type of business expenditure (%)

	2009	2010	2011
Building	69.6	26.5	25.7
Equipment	68.5	15.2	14
Software	69.6	8.2	7.4
Training	69.3	8.9	10.5
Marketing	67.3	8.9	10.9

In terms of source of funds to underwrite enterprise investments, the data indicate widespread use of owners' own resources as the main input for the firm investments. In Jamaica, owner's input was at 66.1% of the sample, 56.6% for Trinidad and Tobago, with retained earnings or business generated funds accounting for a distant second at 25.8%.

In Barbados, 70% of owners/entrepreneurs also invested their own resources into their businesses as the main source of investment input. The data results did not show any discernible trends for Colombia, given the extent of missing values.

In all territories except for Barbados, creative enterprises earned the bulk of their revenues from the provision of service to clients. In Jamaica, Colombia and Trinidad and Tobago, 61.5%, 47.1% and 61.5% respectively, indicated that provision of service to clients accounted for 100% of their firm revenues. In Barbados, on the other hand, 50% of respondents indicated that merchandise sales accounted for 100% of their revenues.

In terms of the origination of income from different markets, the data reveal a disproportionate concentration on local markets among creative industries enterprises: in Jamaica, 40.9% of all respondents indicated that 100% of their revenues originated with national clients, although there is evidence of a small stream of income from regional and international sources. For Barbados, a combined 42% of respondents indicated that between 20-30% of their income were derived from national clients, whereas 25.5% of respondents indicated that 80% of their revenues were derived from tourists.

The pre-tax gross income for the creative industries was yet another piece of evidence that the sector is populated with mainly small and medium enterprises. The majority of creative industries enterprises in all four countries were earning pre-tax incomes at below USD 100,000 annually. And just a handful were earning between USD 101,000 – USD 300,000. Table 4 below illustrates this point in greater detail.

The data results also indicate that creative industries enterprises do not seem to integrate e-commerce facilities within their operations. It is only in the Jamaican context that this observation did not hold. Figure 6 below gives further data results.

Table 5: Creative enterprises with e-commerce facility (%)

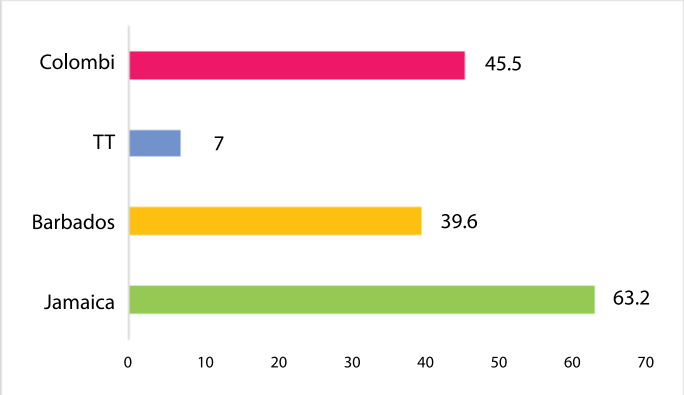


Table 4: Pre-tax gross income (%)

		2008	2009	2010
Jamaica	<USD100K	81.7	79.1	79
	USD101-300K	*14.7*	*15.7*	*13.7*
Colombia	<USD100K	86.8	19.1	84.4
	USD101-300K	*3.9*	*15.7*	*4.7*
TT	<USD100K	63	67	52
	USD101-300K	*2*	*3*	*29*
Barbados	<USD100K	98.1	98.1	100
	USD101-300K	-	-	-

It appears that the main usages for the e-commerce facility especially in Jamaica and Barbados are for advertising and sales, communication, to facilitate payments and for its use as a work tool.

The three main reasons offered for the current non-use of an e-commerce facility is that respondents think they don't have a need for the technology, they lack the requisite resources to set up the facility and that some have started the process of acquiring the technology but it has not yet been completed.

There are other reasons that were proffered, but which were less popular, including 'ignorance' and 'technological problems'.

Baseline data analysis: National Experts Survey

The data results presented in this section of the report represent the state of important framework conditions that are critical to the optimal functioning of the creative industries and for providing a platform for their continued sustainable growth and development. The findings represent the views of several experts consulted in each country on wide ranging issues specific to the creative industries.

ACCESS TO FINANCE

The data results indicate that of all the four countries, only the Barbadian respondents had favourable perceptions about the ease of access to, and availability of capital. A detailed breakdown of the percentages is shown in Table 6 below.

Table 6: National experts' perceptions of access to finance (%)

		Jamaica	Trinidad & Tobago	Colombia	Barbados
Sufficient equity funding	Completely false	63.2	14.3	25	
	Somewhat false	26.3	42.9	39.6	12.5
	Neither true nor false	5.3	9.5	12.5	12.5
	Somewhat true	5.5	28.6	18.8	
	Completely true	-	4.8	4.2	75
Sufficient debt funding	Completely false	70	10	26.1	12.5
	Somewhat false	15	50	39.1	12.5
	Neither true nor false	10	15	10.9	12.5
	Somewhat true	5	25	21.7	-
	Completely true	-	-	2.2	62.5
Sufficient government subsidies	Completely false	47.6	25	17.4	-
	Somewhat false	28.6	40	39.1	-
	Neither true nor false	9.5	20	28.3	40
	Somewhat true	14.3	10	15.2	10
	Completely true	-	5	-	50
Sufficient funding from private individuals	Completely false	47.4	45	21.7	10
	Somewhat false	31.6	25	50	-
	Neither true nor false	5.3	20	17.4	-
	Somewhat true	10.5	10	8.7	30
	Completely true	5.3	-	2.2	60
Sufficient funding from venture capital	Completely false	31.6	16.7	39.1	11.1
	Somewhat false	31.6	38.9	41.3	-
	Neither true nor false	15.8	16.7	13	11.1
	Somewhat true	21.1	22.2	6.5	-
	Completely true	-	5.6		77.8
Sufficient funding from IPO	Completely false	47.4	50	61.5	20
	Somewhat false	36.8	25	20.5	10
	Neither true nor false	5.3	18.8	15.4	10
	Somewhat true	10.5	6.3	2.6	10
	Completely true	-	-	-	60

GOVERNMENT POLICIES

In Barbados, more than 70% of the experts consulted were of the view that Barbadian government policies (e.g. public procurement) consistently favour new firms; just about half were of the view that the government supports new and growing firms as a national high priority, similarly just about 55% of the sample also believe there is high support for new firms at the local government level. In terms of the time required to get the necessary permits and licenses for their business operation, 40% of the respondents indicated that it is completely true that they can get those documents in about a week. Just about 37.5% also believe it is mostly true that the amount of taxes is not a burden for new and growing firms, whereas 50% suggest that taxes and other government regulations are not applied to new and growing firms in a predictable and consistent way. And finally, 70%

of the experts concur that in Barbados, a wide range of government assistance for new and growing firms can be obtained through contact with a single agency.

Again it appears that only the Barbadian experts had overall favourable opinions on government policy towards new and growing firms.

Table 7: National experts' perceptions of Government policies

		Jamaica	Trinidad & Tobago	Colombia	Barbados
Government policies (e.g., public procurement) consistently favour new firms	Completely false	60	26.1	17.8	10
	Somewhat false	15	43.5	35.6	
	Neither true nor false	25	17.4	26.7	20
	Somewhat true	-	13	17.8	20
	Completely true	-	-	2.2	50
Support for new and growing firms is high priority for policy at the national government level	Completely false	36.4	38.1	14.6	20
	Somewhat false	31.8	42.9	37.5	
	Neither true nor false	13.6	14.3	31.3	30
	Somewhat true	9.1	4.8	12.5	-
	Completely true	9.1	-	4.2	50
Support for new and growing firms is a high priority for policy at the local government level	Completely false	47.8	28.6	23.7	
	Somewhat false	34.8	47.6	34.2	11.1
	Neither true nor false	13	4.8	26.3	22.2
	Somewhat true	4.3	19	15.8	11.1
	Completely true	-	-	-	55.6
New firms can get most of the required permits and licenses in about a week	Completely false	70	41.2	29.8	30
	Somewhat false	25	35.3	31.9	20
	Neither true nor false	5	23.5	17	10
	Somewhat true	-	-	21.3	-
	Completely true	-	-	-	40
The amount of taxes is not a burden for new and growing firms	Completely false	78.3	10	37	25
	Somewhat false	13	30	26.1	
	Neither true nor false	4.3	30	8.7	37.5
	Somewhat true	4.3	25	17.4	12.5
	Completely true	-	5	10.9	25
Taxes and other government regulations are applied to new and growing firms in a predictable and consistent way	Completely false	52.2	11.1	22.2	50
	Somewhat false	21.7	27.8	31.1	12.5
	Neither true nor false	4.3	33.3	15.6	12.5
	Somewhat true	17.4	27.8	28.9	-
	Completely true	4.3	-	2.2	25
Coping with government bureaucracy, regulations and licensing requirements is not unduly difficult	Completely false	59.1	30	19.6	10
	Somewhat false	22.7	35	32.6	10
	Neither true nor false	9.1	15	21.7	20
	Somewhat true	4.5	15	19.6	20
	Completely true	4.5	5	6.5	40

GOVERNMENTAL PROGRAMS

Table 8 below shows the results of the experts' perceptions of governmental programs in their respective countries. Consistent with the above trends, it seems the Barbadians have a far more favourable perception of their governmental policies on the creative industries. More than half the sample indicated they believe it true that Barbados' governmental policies towards the creative industries provide for a wide range of assistance for new and growing firms through a single agency; this sharply contrasts with the perceptions of experts in Jamaica, Trinidad and Tobago and Colombia.

Table 8: Experts' perceptions of governmental programs

		Jamaica	Trinidad & Tobago	Colombia	Barbados
Wide range of governmental assistance for new and growing firms through contact with single agency.	Completely false	60	20	33.3	10
	Somewhat false	20	40	22.2	10
	Neither true nor false	10	25	24.4	-
	Somewhat true	10	10	13.3	20
	Completely true	-	5	6.7	50
Science parks and business incubators provide effective support for new and growing firms.	Completely false	30	26.3	9.5	20
	Somewhat false	25	36.8	31	-
	Neither true nor false	10	21.1	35.7	10
	Somewhat true	20	5.3	14.3	20
	Completely true	15	5.3	9.5	50
There are an adequate number of government programs for new and growing businesses	Completely false	54.5	18.2	13	30
	Somewhat false	36.4	45.5	32.6	10
	Neither true nor false	9.1	36.4	30.4	-
	Somewhat true	-	-	15.2	10
	Completely true	-	-	8.7	50
The people working for government agencies are competent and effective in supporting new and growing firms.	Completely false	38.1	26.1	20.9	10
	Somewhat false	28.6	39.1	27.9	20
	Neither true nor false	28.6	21.7	32.6	20
	Somewhat true	4.8	13	16.3	10
	Completely true	-	-	2.3	40
Almost anyone who needs help from a government program for a new or growing business can find what they need	Completely false	52.2	26.1	17.4	20
	Somewhat false	34.8	52.2	50	10
	Neither true nor false	4.3	21.7	21.7	20
	Somewhat true	8.7	-	4.3	-
	Completely true	-	-	6.5	50
Government programs aimed at supporting new and growing firms are effective	Completely false	42.9	13	16.3	11.1
	Somewhat false	28.6	34.8	46.5	11.1
	Neither true nor false	9.5	21.7	23.3	11.1
	Somewhat true	19	17.4	11.6	22.2
	Completely true	-	8.7	2.3	44.4

EDUCATION AND TRAINING

According to Table 9 below, it appears there is some regional consensus among experts that the education and training provisions specific to the creative industries are inadequate. As an example, the experts were in unison that it is totally false or mostly false if one were to assert that teaching in primary and secondary education provides adequate instruction in market economic principles. The overall idea being suggested in Table 9 is that regional experts believe the current education and training content and focus do not sufficiently build the competencies and capabilities in students to become entrepreneurs or even to have an entrepreneurial mind set.

Table 9: Experts' perceptions of education and training

		Jamaica	Trinidad & Tobago	Colombia	Barbados
Teaching in primary and secondary education encourages creativity, self-sufficiency and personal initiative	Completely false	45.8	13	43.5	33.3
	Somewhat false	8.3	34.8	37	22.2
	Neither true nor false	12.5	21.7	6.5	-
	Somewhat true	20.8	17.4	13	22.2
	Completely true	12.5	8.7	-	22.2
Teaching in primary and secondary education provides adequate instruction in market economic principles	Completely false	56.5	13	53.3	40
	Somewhat false	17.4	47.8	20	10
	Neither true nor false	17.4	17.4	15.6	-
	Somewhat true	4.3	21.7	11.1	-
	Completely true	4.3	-	-	40
Teaching in primary and secondary education provides adequate attention to entrepreneurship and new firm creation	Completely false	56.5	39.1	52.3	30
	Somewhat false	17.4	30.4	20.5	10
	Neither true nor false	21.7	21.7	22.7	-
	Somewhat true	4.3	8.7	4.2	10
	Completely true	-	-	-	50
Colleges and universities provide good and adequate preparation for starting up and growing new firms	Completely false	25	8.7	19.6	10
	Somewhat false	8.3	30.4	37	10
	Neither true nor false	45.8	21.7	28.3	10
	Somewhat true	20.8	34.8	8.7	40
	Completely true	-	4.3	6.5	30
The level of business and management education provide good and adequate preparation for starting up and growing new firms	Completely false	8.7	9.1	12.2	11.1
	Somewhat false	17.4	18.2	26.8	11.1
	Neither true nor false	4.3	18.2	22	11.1
	Somewhat true	47.8	50	29.3	11.1
	Completely true	21.7	4.5	9.8	55.6
The vocational, professional and continuing education systems provide good and adequate preparation for starting up and growing new firms	Completely false	8.7	4.5	15	10
	Somewhat false	13	9.1	22.5	20
	Neither true nor false	13	27.3	25	40
	Somewhat true	56.5	50	27.5	-
	Completely true	8.7	9.1	10	30

RESEARCH AND DEVELOPMENT TRANSFER

The overall finding here is that the national experts' opinions tended toward the perception of limited research and development transfer in the four countries. It is particularly interesting that most experts believe it is completely or somewhat false that new technology, science and other knowledge are efficiently transferred from universities and public research centres to new and growing firms. Table 10 contains further results.

Table 10: Experts' perception of research and development transfer

		Jamaica	Trinidad & Tobago	Colombia	Barbados
New technology, science, and other knowledge are efficiently transferred from universities and public research centers to new and growing firms.	Completely false	20	47.6	15	10
	Somewhat false	26.7	19	22.5	20
	Neither true nor false	26.7	14.3	25	50
	Somewhat true	26.7	19	27.5	20
	Completely true	-	-	10	-
New and growing firms have just as much access to new research and technology as large, established firms.	Completely false	30	31.8	24.4	20
	Somewhat false	35	13.6	31.7	20
	Neither true nor false	10	4.5	26.8	10
	Somewhat true	20	36.4	14.6	10
	Completely true	5	13.6	2.4	40
New and growing firms can afford the latest technology.	Completely false	44	38.1	40.5	20
	Somewhat false	40	23.8	40.5	20
	Neither true nor false	16	19	16.7	10
	Somewhat true	-	14.3	2.4	10
	Completely true		4.8	-	40
There are adequate government subsidies for new and growing firms to acquire new technology.	Completely false	50	26.3	46.3	12.5
	Somewhat false	40.9	47.4	34.1	25
	Neither true nor false	4.5	15.8	14.6	12.5
	Somewhat true	4.5	10.5	4.9	-
	Completely true	-	-	-	50
The science and technology base efficiently supports the creation of world-class new technology-based ventures in at least one area.	Completely false	40	35.3	14.7	22.2
	Somewhat false	13.3	23.5	14.7	33.3
	Neither true nor false	33.3	35.3	26.5	11.1
	Somewhat true	13.3	5.9	29.5	-
	Completely true	-	-	14.7	33.3
There is good support available for engineers and scientists to have their ideas commercialized through new and growing firms.	Completely false	70.6	50	27.5	10
	Somewhat false	11.8	25	45	20
	Neither true nor false	5.9	20	17.5	-
	Somewhat true	11.8	5	10	20
	Completely true	-	-	-	50

COMMERCIAL AND SERVICES INFRASTRUCTURE

This aspect of the research gauged participants' perception of the supporting environment required to facilitate the seamless and optimal operation of creative enterprises. There were unified opinions that it is fairly easy to get accounting and banking services. There also seemed to be consistent opinions on the extent to which businesses can get subcontractors to perform specific jobs or to make specific supplies available. As an example, in all four countries the experts believe that new and growing firms cannot afford the cost of using subcontractors, suppliers, and consultants.

Table 11: Experts' perceptions of commercial and services infrastructure

		Jamaica	Trinidad & Tobago	Colombia	Barbados
There are enough subcontractors, suppliers, and consultants to support new and growing firms.	Completely false	41.2	9.5	13.6	20
	Somewhat false	23.5	33.3	36.4	10
	Neither true nor false	11.8	14.3	27.3	30
	Somewhat true	23.5	38.1	18.2	10
	Completely true	-	4.8	4.5	30
New and growing firms can afford the cost of using subcontractors, suppliers, and consultants.	Completely false	33.3	38.1	31.9	20
	Somewhat false	27.8	33.3	46.8	20
	Neither true nor false	38.9	14.3	14.9	10
	Somewhat true	-	14.3	4.3	20
	Completely true	-	-	2.1	30
It is easy for new and growing firms to get good subcontractors, suppliers, and consultants.	Completely false	27.8	33.3	20.5	11.1
	Somewhat false	22.2	33.3	34.1	-
	Neither true nor false	38.9	14.3	27.3	22.2
	Somewhat true	11.1	14.3	15.9	44.4
	Completely true	-	4.8	2.3	22.2
It is easy for new and growing firms to get good, professional legal and accounting services.	Completely false	13	33.3	18.8	11.1
	Somewhat false	13	9.5	29.2	-
	Neither true nor false	8.7	28.6	25	22.2
	Somewhat true	60.9	23.8	20.8	44.4
	Completely true	4.3	4.8	6.3	22.2
It is easy for new and growing firms to get good banking services (checking accounts, foreign exchange transactions, letters of credit, and the like).	Completely false	29.2	9.5	14.6	20
	Somewhat false	12.5	14.3	29.2	20
	Neither true nor false	29.2	9.5	20.8	40
	Somewhat true	29.2	61.9	31.3	-
	Completely true		4.8	4.2	20

MARKET OPENNESS AND PHYSICAL INFRASTRUCTURE

Tables 12 and 13 below show the results of expert's opinions on market openness and physical infrastructure respectively. Importantly, national experts believe, in general, that new and growing firms cannot easily enter new markets. This was a consistent view in all countries, but for Barbados.

Similarly, there was general agreement that new firms can usually enter the market without undue disturbance from more established firms.

There were generally favourable views on the level and adequacy of physical infrastructure in the four countries. Utilities and communications, the experts believe, are at a fairly good standard to facilitate the businesses of creative entrepreneurs.

Table 12: Experts' opinion on market openness

		Jamaica	Trinidad & Tobago	Colombia	Barbados
The markets for consumer goods and services change dramatically from year to year.	Completely false	18.2	22.7	7.9	40
	Somewhat false	27.3	22.7	13.2	10
	Neither true nor false	31.8	50	34.2	40
	Somewhat true	22.7	4.5	34.2	10
	Completely true	-	-	10.5	-
The markets for business-to-business goods and services change dramatically from year to year.	Completely false		4.8	5.6	37.5
	Somewhat false	15.8	14.3	16.7	12.5
	Neither true nor false	31.6	42.9	33.3	25
	Somewhat true	36.8	33.3	36.1	12.5
	Completely true	15.8	4.8	8.3	12.5
New and growing firms can easily enter new markets.	Completely false	26.1	14.3	26.1	11.1
	Somewhat false	26.1	52.4	26.1	11.1
	Neither true nor false	21.7	14.3	34.8	55.6
	Somewhat true	21.7	19	13	-
	Completely true	4.3	-	-	22.2
The new and growing firms can afford the cost of market entry.	Completely false	39.1	14.3	21.7	-
	Somewhat false	21.7	47.6	47.8	30
	Neither true nor false	26.1	23.8	28.3	30
	Somewhat true	13	14.3	2.2	10
	Completely true	-	-	-	30
New and growing firms can enter markets without being unfairly blocked by established firms.	Completely false	42.9	28.6	25	-
	Somewhat false	28.6	42.9	40.9	-
	Neither true nor false	19	23.8	20.5	25
	Somewhat true	9.5	4.8	9.1	37.5
	Completely true	-	-	4.5	37.5
The anti-trust legislation is effective and well enforced.	Completely false	52.9	35.7	29.4	25
	Somewhat false	17.6	28.6	26.5	25
	Neither true nor false	17.6	35.7	35.3	12.5
	Somewhat true	11.8	-	8.8	37.5
	Completely true	-	-	-	-

Table 13: Experts' opinion on physical infrastructure

		Jamaica	Trinidad & Tobago	Colombia	Barbados
The physical infrastructure (roads, utilities, communications, and waste disposal) provides good support for new and growing firms.	Completely false	13.6	4.8	16.7	30
	Somewhat false	31.8	19	26.2	50
	Neither true nor false	27.3	9.5	26.2	-
	Somewhat true	22.7	57.1	16.7	-
	Completely true	4.5	4.8	14.3	20
It is not too expensive for a new or growing firm to get good access to communications (phone, Internet, etc.).	Completely false	4		2.1	30
	Somewhat false	20	18.2	21.3	50
	Neither true nor false	8	4.5	14.9	-
	Somewhat true	64	50	38.3	20
	Completely true	4	27.3	23.4	-
A new or growing firm can get good access to communications (telephone, internet, etc.) in about a week.	Completely false	12.5		6.5	10
	Somewhat false	8.3	30.4	15.2	20
	Neither true nor false	4.2	-	13	10
	Somewhat true	54.2	47.8	41.3	10
	Completely true	20.8	21.7	23.9	50
New and growing firms can afford the cost of basic utilities (gas, water, electricity, sewer).	Completely false	20.8		6.4	40
	Somewhat false	16.7	9.1	17	20
	Neither true nor false	12.5	13.6	21.3	10
	Somewhat true	45.8	59.1	44.7	10
	Completely true	4.2	18.2	10.6	20
New or growing firms can get good access to utilities (gas, water, electricity, sewer) in about a month.	Completely false	4.2	4.3	6.4	40
	Somewhat false	4.2	13	6.4	30
	Neither true nor false	12.5	13	17	-
	Somewhat true	58.3	56.5	48.9	10
	Completely true	20.8	13	21.3	20

CULTURAL AND SOCIAL NORMS

Table 14 presents the views on cultural and social norms and their relevance to the creative industries. One of the defining findings is that for Jamaica, Barbados, Trinidad and Tobago and Colombia, the experts were of the view that there is a national culture which does not encourage entrepreneurial risk taking.

Table 14: Experts' opinions on cultural and social norms

		Jamaica	Trinidad & Tobago	Colombia	Barbados
The national culture is highly supportive of individual success achieved through own personal efforts.	Completely false	8.3	13	8.7	44.4
	Somewhat false	12.5	21.7	32.6	22.2
	Neither true nor false	8.3	21.7	13	11.1
	Somewhat true	29.2	34.8	26.1	11.1
	Completely true	41.7	8.7	19.6	11.1
The national culture emphasizes self-sufficiency, autonomy, and personal initiative.	Completely false	8.7	13	-	40
	Somewhat false	8.7	30.4	-	30
	Neither true nor false	21.7	39.1	-	-
	Somewhat true	39.1	17.4	-	30
	Completely true	21.7	-	-	
The national culture encourages entrepreneurial risk-taking.	Completely false	17.4	17.4	13	20
	Somewhat false	13	34.8	30.4	40
	Neither true nor false	34.8	39.1	23.9	20
	Somewhat true	13	4.3	23.9	20
	Completely true	21.7	4.3	8.7	-
The national culture encourages creativity and innovativeness.	Completely false	-	8.7	10.6	20
	Somewhat false	-	39.1	25.5	40
	Neither true nor false	-	21.7	19.1	20
	Somewhat true	-	30.4	25.5	10
	Completely true	-	-	19.1	10
The national culture emphasizes the responsibility that the individual (rather than the collective) has in managing his or her own life.	Completely false		4.3	2.2	20
	Somewhat false	8.3	26.1	17.8	40
	Neither true nor false	29.2	26.1	28.9	20
	Somewhat true	50	34.8	35.6	20
	Completely true	12.5	8.7	15.6	-

OPPORTUNITIES TO START UP

As Figure 15 below indicates, with the exception of Trinidad and Tobago where 63.6% of the respondents believe there are plenty of good opportunities for the creation of new firms, the majority of respondents in Jamaica, Colombia and Barbados were of the view that such opportunities are limited in their country. On the contrary though, 45% of the respondents from Jamaica, 60.5% and 62.5% from Colombia and Barbados respectively, believe that good opportunities for new firms have increased considerably in the past five years.

Table 15: Experts' opinions about opportunities to start up

		Jamaica	Trinidad & Tobago	Colombia	Barbados
There are plenty of good opportunities for the creation of new firms.	Completely false	36.4	4.5	17	30
	Somewhat false	18.2	18.2	23.4	10
	Neither true nor false	22.7	13.6	25.5	40
	Somewhat true	18.2	50	21.3	10
	Completely true	4.5	13.6	12.8	10
There are more good opportunities for the creation of new firms than there are people able to take advantage of them.	Completely false	43.5	19	11.1	33.3
	Somewhat false	34.8	33.3	24.4	11.1
	Neither true nor false	8.7	23.8	28.9	-
	Somewhat true	8.7	19	22.2	22.2
	Completely true	4.3	4.8	13.3	33.3
Good opportunities for new firms have considerably increased in the past five years.	Completely false	10	19	9.3	12.5
	Somewhat false	20	33.3	14	12.5
	Neither true nor false	25	23.8	16.3	12.5
	Somewhat true	40	19	44.2	12.5
	Completely true	5	4.8	16.3	50
Individuals can easily pursue entrepreneurial opportunities.	Completely false	12.5		15.6	50
	Somewhat false	29.2	31.8	46.7	10
	Neither true nor false	20.8	36.4	31.1	10
	Somewhat true	37.5	27.3	6.7	10
	Completely true		4.5	-	20
There are plenty of good opportunities to create truly high growth firms.	Completely false	14.3	9.5	14	20
	Somewhat false	42.9	33.3	39.5	20
	Neither true nor false	28.6	23.8	27.9	20
	Somewhat true	9.5	23.8	18.6	10
	Completely true	4.8	9.5		30

ABILITIES AND KNOWLEDGE TO START UP

The experts were of the view that many individuals do not know how to start and manage a high growth business. As Table 16 shows, fewer than 95% of the respondents in Trinidad and Tobago were of that view, compared to 12.5% in Barbados. The views were similar on the matter of whether many people know how to start and manage a small business.

Table 16: Experts opinions on abilities and knowledge to start up

		Jamaica	Trinidad & Tobago	Colombia	Barbados
Many people know how to start and manage a high-growth business.	Completely false	50	34.8	20.3	12.5
	Somewhat false	41.7	60.9	52.3	-
	Neither true nor false	4.2	4.3	11.4	25
	Somewhat true	4.2	-	11.4	25
	Completely true	-	-	4.5	37.5
Many people know how to start and manage a small business.	Completely false	21.7	21.7	13.6	33.3
	Somewhat false	52.2	39.1	36.4	11.1
	Neither true nor false	8.7	8.7	20.5	11.1
	Somewhat true	17.4	30.4	15.9	11.1
	Completely true	-		13.6	33.3
Many people have experience in starting a new business	Completely false		36.4	20.9	11.1
	Somewhat false		40.9	41.9	33.3
	Neither true nor false		4.5	20.9	11.1
	Somewhat true		13.6	7	
	Completely true		4.5	9.3	44.4
Many people can react quickly to good opportunities for a new business.	Completely false	32	8.7	16.3	33.3
	Somewhat false	52	56.5	34.9	11.1
	Neither true nor false	8	17.4	16.3	22.2
	Somewhat true	8	13	18.6	11.1
	Completely true	-	4.3	14	22.2
Many people have the ability to organize the resources required for a new business.	Completely false	52	13	23.3	22.2
	Somewhat false	44	65.2	32.6	
	Neither true nor false	4	13	23.3	33.3
	Somewhat true	-	8.7	9.3	11.1
	Completely true	-	-	11.6	33.3

ENTREPRENEUR SOCIAL IMAGE

The data in Table 17 below indicate that respondents generally have a highly favourable perception of entrepreneurs. In particular, it seems to be very popular among respondents in all the countries that being an entrepreneur is a desirable career choice, and that the creation of new ventures is considered an appropriate way to become rich.

Table 17: Experts' opinion on entrepreneur social image

		Jamaica	Trinidad & Tobago	Colombia	Barbados
The creation of new ventures is considered an appropriate way to become rich.	Completely false		4.3	17	30
	Somewhat false	16.7	26.1	17	
	Neither true nor false	25	26.1	34	20
	Somewhat true	16.7	39.1	27.7	30
	Completely true	41.7	4.3	4.3	20
Most people consider becoming an entrepreneur as a desirable career choice.	Completely false	4	8.7	4.2	30
	Somewhat false	12	39.1	12.5	
	Neither true nor false	24	8.7	12.5	20
	Somewhat true	16	39.1	54.2	50
	Completely true	44	4.3	16.7	
Successful entrepreneurs have a high level of status and respect.	Completely false	4		2.2	
	Somewhat false	4	4.3	8.7	
	Neither true nor false	8	13	8.7	
	Somewhat true	40	60.9	45.7	
	Completely true	44	21.7	34.8	
You will often see stories in the public media about successful entrepreneurs.	Completely false	4.2	8.7	10.6	30
	Somewhat false	8.3	21.7	14.9	40
	Neither true nor false	8.3	21.7	31.9	20
	Somewhat true	29.2	43.5	31.9	
	Completely true	50	4.3	10.6	10
Most people think of entrepreneurs as competent, resourceful individuals.	Completely false	4		2.1	40
	Somewhat false	4	17.4	4.3	
	Neither true nor false	8	21.7	17	30
	Somewhat true	44	43.5	51.1	10
	Completely true	40	17.4	25.5	20

INTELLECTUAL PROPERTY RIGHTS

The data results suggest that the experts are doubtful about the efficacy and robustness of regional intellectual property rights regimes. Table 18 below gives further information. The two dominant issues which emerge from Table 18 is that the experts think intellectual property rights legislations are inefficiently enforced and also that the illegal sales of 'pirated' software, videos, CDs, and other copyrighted or trademarked products is extensive. This view was consistent among all experts in all the countries.

Table 18: Experts' opinion on intellectual property rights

		Jamaica	Trinidad & Tobago	Colombia	Barbados
The Intellectual Property Rights (IPR) legislation is comprehensive.	Completely false	7.7	17.6	11.6	55.6
	Somewhat false	30.8	23.5	27.9	
	Neither true nor false	38.5	35.3	32.6	22.2
	Somewhat true	23.1	23.5	25.6	11.1
	Completely true			2.3	11.1
The Intellectual Property Rights (IPR) legislation is efficiently enforced.	Completely false	33.3	35.3	23.3	20
	Somewhat false	41.7	29.4	48.8	20
	Neither true nor false	25	29.4	20.9	
	Somewhat true		5.9	7	10
	Completely true				50
The illegal sales of 'pirated' software, videos, CDs, and other copyrighted or trademarked products is not extensive.	Completely false	43.5	61.9	65.1	
	Somewhat false	17.4	23.8	25.6	
	Neither true nor false	13		4.7	
	Somewhat true	13	9.5	4.7	
	Completely true	13	4.8		
New and growing firms can trust that their patents, copyrights, and trade-marks will be respected.	Completely false	28.6	13.6	25	
	Somewhat false	19	54.5	38.6	
	Neither true nor false	9.5	13.6	15.9	
	Somewhat true	33.3	18.2	18.2	
	Completely true	9.5		2.3	
It is widely recognized that inventors' rights for their inventions should be respected.	Completely false	21.7	13.6	9.1	44.4
	Somewhat false	8.7	54.5	25	11.1
	Neither true nor false	8.7	13.6	9.1	11.1
	Somewhat true	39.1	18.2	38.6	11.1
	Completely true	21.7		18.2	22.2

equally *able* to start a new business'. So it appears

WOMEN'S SUPPORT TO START UP

The experts' opinions as shown in Table 19, seem to be in line with the findings from the adult population survey that female involvement in the creative industries is eclipsed by that of males. When these findings are cross-referenced with the GEM Caribbean country reports for 2011, a more nuanced understanding of this idea emerges; while respondents mostly are of the view that women can become entrepreneurs, importantly they believe it is most untrue that women are 'equally *exposed to good opportunities* to start a new business' and also that it is mostly untrue 'men and women are some moment of importance turns on the issue of exposure to opportunities and ability to start businesses as the two critical variables that account for the variance between male and female involvement as entrepreneurs. On the other hand, a recent study conducted by the Women's Entrepreneurial Venture Scope ranked highly Colombia and Trinidad and Tobago as among the best places for female entrepreneurs to operate. Jamaica, on the other hand, was ranked last from the 20 countries included on the index. For sure, this issue is deserving of more robust research and further data collection, especially given the economic role that

females play in Caribbean economies[6].

Table 19: Experts' opinions on women's support to start up

		Jamaica	Trinidad & Tobago	Colombia	Barbados
The Intellectual Property Rights (IPR) legislation is comprehensive.	Completely false	7.7	17.6	11.6	55.6
	Somewhat false	30.8	23.5	27.9	
	Neither true nor false	38.5	35.3	32.6	22.2
	Somewhat true	23.1	23.5	25.6	11.1
	Completely true			2.3	11.1
The Intellectual Property Rights (IPR) legislation is efficiently enforced.	Completely false	33.3	35.3	23.3	20
	Somewhat false	41.7	29.4	48.8	20
	Neither true nor false	25	29.4	20.9	
	Somewhat true		5.9	7	10
	Completely true				50
The illegal sales of 'pirated' software, videos, CDs, and other copyrighted or trademarked products is not extensive.	Completely false	43.5	61.9	65.1	
	Somewhat false	17.4	23.8	25.6	
	Neither true nor false	13		4.7	
	Somewhat true	13	9.5	4.7	
	Completely true	13	4.8		
New and growing firms can trust that their patents, copyrights, and trade-marks will be respected.	Completely false	28.6	13.6	25	
	Somewhat false	19	54.5	38.6	
	Neither true nor false	9.5	13.6	15.9	
	Somewhat true	33.3	18.2	18.2	
	Completely true	9.5		2.3	
It is widely recognized that inventors' rights for their inventions should be respected.	Completely false	21.7	13.6	9.1	44.4
	Somewhat false	8.7	54.5	25	11.1
	Neither true nor false	8.7	13.6	9.1	11.1
	Somewhat true	39.1	18.2	38.6	11.1
	Completely true	21.7		18.2	22.2

ATTENTION TO GROWTH AND INTEREST IN INNOVATION

Both tables 20 and 21 present data on two critical aspects of regional creative industries; the main finding from Table 20 is that the experts are of the view that across the region, there are not many support initiatives that are specially tailored for high-growth entrepreneurial activity. But based on Table 21, the experts are of the view that that there is significant interest in innovation for the creative industries sector. They were of the view that companies like to experiment with new technologies and with new ways of doing things, and also that consumers like to try out new products and services, while innovation is highly valued by companies. So the experts seem to be suggesting that there is some divergence between attention to growth at the policy governance level and innovation adoption at the level of micro agents such as consumers and enterprises.

6 *http://ois.sebrae.com.br/wp-content/uploads/2013/10/publicacao-Women-Entrepreneurial-Venture-Scope-2013.pdf*

Table 20: Experts' opinions on attention to growth

		Jamaica	Trinidad & Tobago	Colombia	Barbados
There are many support initiatives that are specially tailored for high-growth entrepreneurial activity.	Completely false		21.1	9.5	25
	Somewhat false		47.4	33.3	37.5
	Neither true nor false		15.8	35.7	
	Somewhat true		15.8	16.7	25
	Completely true		-	4.8	12.5
Policy-makers are aware of the importance of high-growth entrepreneurial activity.	Completely false		20	4.5	50
	Somewhat false	20	15	29.5	12.5
	Neither true nor false	20	25	31.8	12.5
	Somewhat true	53.3	40	29.5	12.5
	Completely true	6.7		4.5	12.5
People working in entrepreneurship support initiatives have sufficient skills and competence to support high-growth firms.	Completely false		15.8	4.8	12.5
	Somewhat false	50	10.5	23.8	25
	Neither true nor false	31.3	42.1	33.3	25
	Somewhat true	18.8	31.6	33.3	12.5
	Completely true			4.8	25
Potential for rapid growth is often used as a selection criterion when choosing recipients of entrepreneurship support.	Completely false	5.3		12.5	14.3
	Somewhat false	10.5	12.5	37.5	28.6
	Neither true nor false	36.8	37.5	50	14.3
	Somewhat true	47.4	50		14.3
	Completely true				28.6
Supporting rapid firm growth is a high priority in entrepreneurship policy.	Completely false	7.1		7.1	
	Somewhat false	21.4		40.5	
	Neither true nor false	21.4		31	
	Somewhat true	35.7		19	
	Completely true	14.3		2.4	

Table 21: Experts' opinions on interest in innovation

		Jamaica	Trinidad & Tobago	Colombia	Barbados
Companies like to experiment with new technologies and with new ways of doing things.	Completely false	8.3	4.5	2.2	12.5
	Somewhat false	16.7	27.3	19.6	12.5
	Neither true nor false	25	18.2	26.1	37.5
	Somewhat true	16.7	45.5	32.6	12.5
	Completely true	33.3	4.5	19.6	25
Consumers like to try out new products and services.	Completely false	8		2.1	55.6
	Somewhat false	12	4.5	12.8	22.2
	Neither true nor false	16	9.1	14.9	22.2
	Somewhat true	40	72.7	48.9	
	Completely true	24	13.6	21.3	
Innovation is highly valued by companies.	Completely false	12.5	10	-	62.5
	Somewhat false	16.7	5	6.4	
	Neither true nor false	29.2	40	29.8	12.5
	Somewhat true	29.2	45	36.2	12.5
	Completely true	12.5	-	27.7	12.5
Innovation is highly valued by consumers.	Completely false	16.7			55.6
	Somewhat false	20.8	18.2		11.1
	Neither true nor false	12.5	22.7		33.3
	Somewhat true	33.3	59.1		
	Completely true	16.7			
Established companies are open to using new, entrepreneurial companies as suppliers.	Completely false	26.3	4.8	7.3	33.3
	Somewhat false	42.1	33.3	43.9	33.3
	Neither true nor false	21.1	33.3	24.4	11.1
	Somewhat true	5..3	23.8	19.5	11.1
	Completely true	5.3	4.8	4.9	11.1
Consumers are open to buying products and services from new, entrepreneurial companies.	Completely false	12		2.3	22.2
	Somewhat false	12	19	36.4	
	Neither true nor false	36	33.3	38.6	44.4
	Somewhat true	28	38.1	18.2	22.2
	Completely true	12	9.5	4.5	11.1

perts indicate that employees do not feel empowered to take decisions, and that most decisions are made through a top-down process. These tenden

ENTREPRENEURIAL BEHAVIOUR BY EMPLOYEES (INTRAPRENEUR-(SHIP

Tables 22 and 23 focus on experts' views on intrapreneurship, which forms an important dimension of any discussions on entrepreneurship in the region. Table 22 suggests that experts are of the opinion that intrapreneurship is not at all prevalent among Caribbean creative enterprises. They cite issues such as decision-making within firms as a manifestation of that claim. Specifically, the excies prevent employees from being empowered and in turn restrict innovation.

Table 23 also suggest that the experts are of the view that the conditions that foster entrepreneurship in the region are weak. Specifically, they do not believe the education system emphasizes innovative and pro-active behaviour of individuals in general and also the fact that entrepreneurs have much less access to social security than other employees.

Table 22: Experts' opinions on entrepreneurial behaviours by employees (intrapreneurship)

		Jamaica	Trinidad & Tobago	Colombia	Barbados
There are no formal restrictions if you want to start a business using the resources, knowledge and contacts obtained from your current job as an employee	Completely false	28.6	21.1	5	14.3
	Somewhat false	23.8	21.1	37.5	
	Neither true nor false	33.3	31.6	35	42.9
	Somewhat true	9.5	15.8	20	14.3
	Completely true	4.8	10.5	2.5	28.6
Top-down decision making strategies dominate bottom-up decision making strategies within large organizations	Completely false			5	71.4
	Somewhat false			17.5	
	Neither true nor false	25	16.7	15	14.3
	Somewhat true	35	61.1	40	
	Completely true	40	22.2	22.5	14.3
Top-down decision making strategies dominate bottom-up decision making strategies within small and medium sized organizations	Completely false				55.6
	Somewhat false			17.5	
	Neither true nor false	26.3		30	11.1
	Somewhat true	42.1		40	11.1
	Completely true	31.6		12.5	22.2
Employers provide support to employees who come up with new ideas.	Completely false	13	5.3	2.3	30
	Somewhat false	43.5	36.8	25	10
	Neither true nor false	17.4	26.3	38.6	20
	Somewhat true	17.4	31.6	31.8	30
	Completely true	8.7		2.3	10
Employees support colleagues who come up with new ideas	Completely false	17.4	5.3	2.4	30
	Somewhat false	39.1	36.8	34.1	20
	Neither true nor false	21.7	26.3	41.5	40
	Somewhat true	17.4	31.6	14.6	10
	Completely true	4.3		7.3	

CONDITIONS THAT FOSTER INTRA-PRENEURSHIP

Table 23: Experts' opinions on conditions that foster intrapreneurship

		Jamaica	Trinidad & Tobago	Colombia	Barbados
Entrepreneurs have much less access to social security than employees	Completely false	15.4	5.3	4.9	37.5
	Somewhat false	15.4	21.1	19.5	12.5
	Neither true nor false	30.8	10.5	24.4	25
	Somewhat true	15.4	36.8	31.7	12.5
	Completely true	23.1	26.3	19.5	12.5
The education system emphasizes innovative and pro-active behavior of individuals in general	Completely false	33.3		16.7	22.2
	Somewhat false	20.8		38.1	11.1
	Neither true nor false	12.5		21.4	33.3
	Somewhat true	33.3		19	22.2
	Completely true			4.8	11.1
Employers stimulate proactive behavior by employees	Completely false		9.5		11.1
	Somewhat false		42.9	23.3	
	Neither true nor false		19	39.5	11.1
	Somewhat true		23.8	32.6	33.3
	Completely true		4.8	4.7	44.4
The level of employment protection is deterring employees to start their own business	Completely false	9.1		2.6	
	Somewhat false	9.1	5	7.7	25
	Neither true nor false	22.7	25	35.9	25
	Somewhat true	50	65	41	12.5
	Completely true	9.1	5	12.8	37.5

5

EMERGENCY THEMES ON ENTREPRENEURSHIP AND THE CREATIVE INDUSTRIES: QUALITATIVE INSIGHTS

This section of the report presents some important qualitative insights from respondents in both the adult population survey and the national experts' survey. Their views span a diverse range of topics pertinent to further progress and evolution in the creative industries.

KEY CHALLENGES FACING THE CREATIVE INDUSTRIES

The respondents were asked to state the key challenges facing the creative industries sector in their country. The figures below, show the main responses elicited in the respective countries.

Figure 6: Key challenges in Barbados (%)

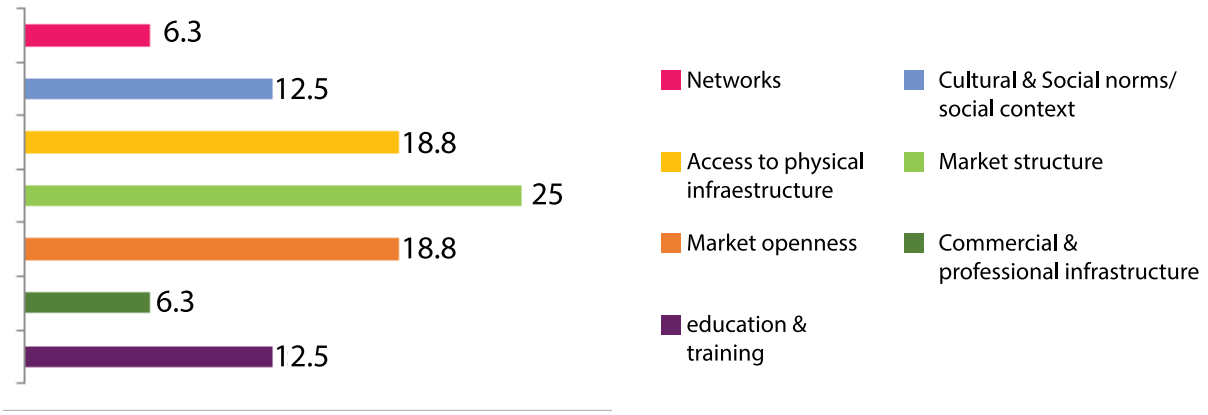


Figure 7: Key challenges for the creative industries sector in Colombia (%)

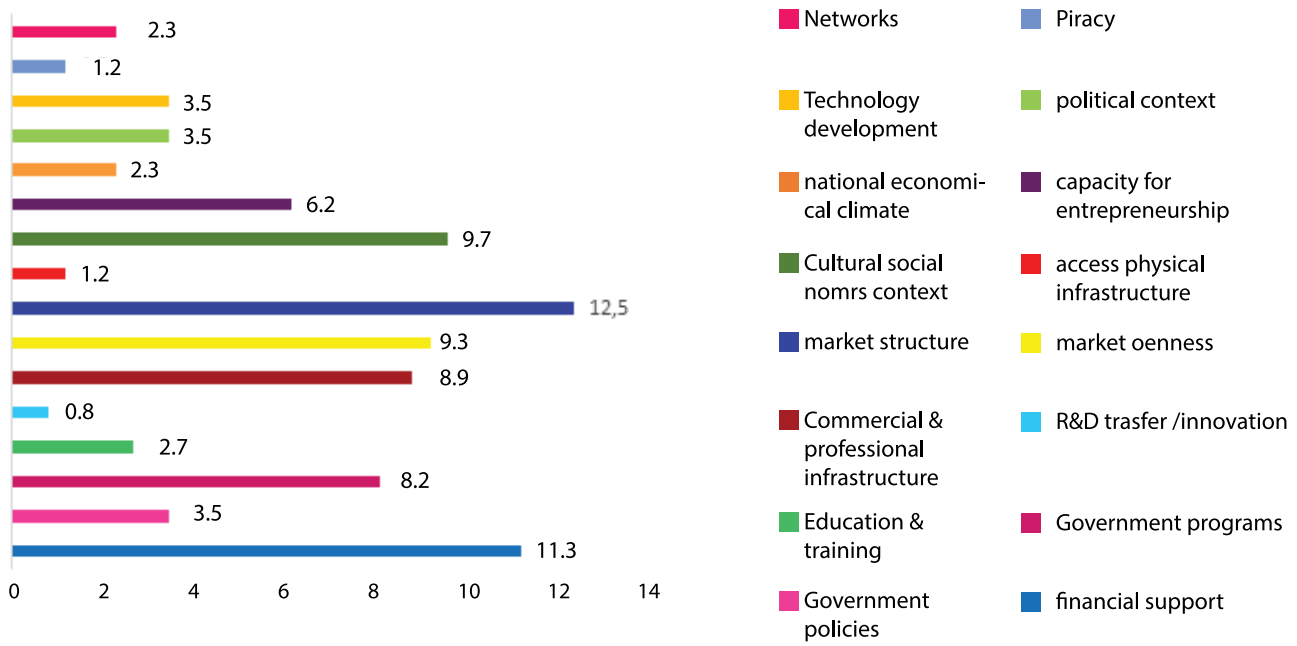


Figure 8: Main challenges for the creative sector in Trinidad and Tobago (%)

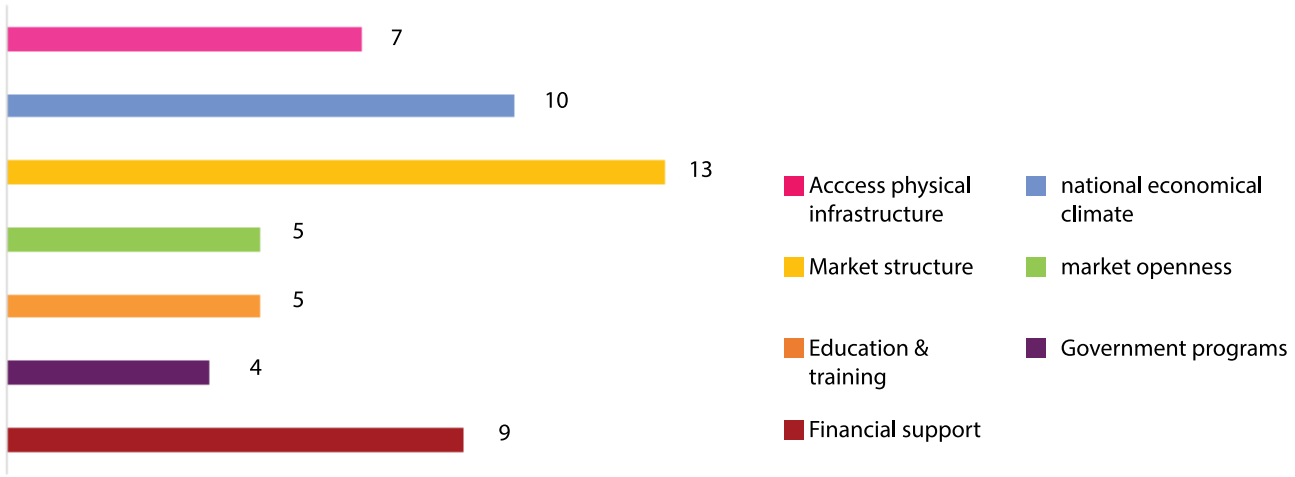
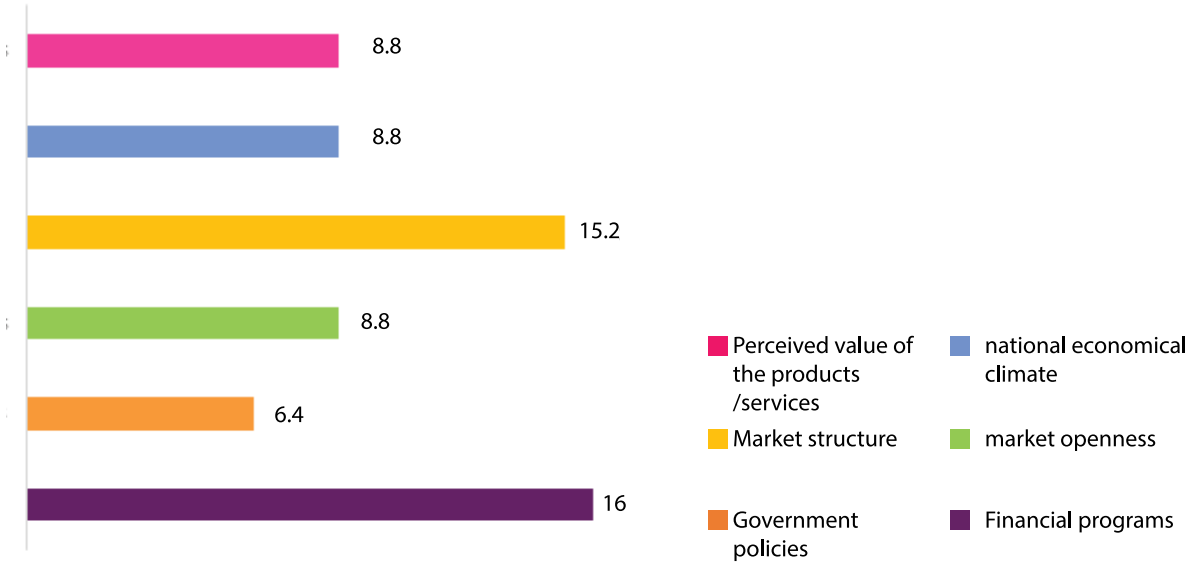


Figure 9: Main challenges in creative industries in Jamaica (%)



The above responses were derived from the adult population survey and show that those respondents were of the view that market structure and market openness, financial support and government policies and programs constitute the main challenges confronting the creative industries sector. This was consistent across all four countries. It is important to also note that this coincided with the views of the national experts, in all countries but for Barbados. In Jamaica, the national experts' opinions suggest that the top six issues besetting the creative industries sector are:

- Financial support
- Government policies
- Education and training
- Access to physical infrastructure
- Education and training
- Market openness

In Barbados on the other hand, the top issues according to their national experts are:

- Government policies
- R&D transfer/innovation
- Cultural and social norms
- Capacity for entrepreneurship and/or management

On the face of it, it appears these findings, in the Latin America and Caribbean (LAC) regional context, are consistent with the literature vis-à-vis the constraints and issues besetting the creative industries in other international jurisdictions.

CONSTRAINTS ON ENTREPRENEURIAL ACTIVITY IN THE ARTISTIC SECTOR

Respondents in the adult population survey and those in national experts' survey were also asked to weigh in on the constraints besetting entrepreneurial activity in the artistic sector, specifically.

Table 24: Main constraints on entrepreneurial activity in the creative artistic sector

Jamaica	Colombia	Trinidad & Tobago	Barbados
1. Financial support	1. Financial support	1. Financial support	1. Financial support
2. Government policies	2. Government policies	2. Education & training	2. Government policies
3. Government programs	3. Government programs	3. Government programs	3. Market openness
4. Perceived value of the products/services	4. Education and training	4. Access to physical infrastructure	4. Market share
5. Private support	5. Market structure	5. Market structure	5. Cultural, social norms & social context
6. Capacity for entrepreneurship and/or management	6. Political context	6. Networks	6. National economic climate

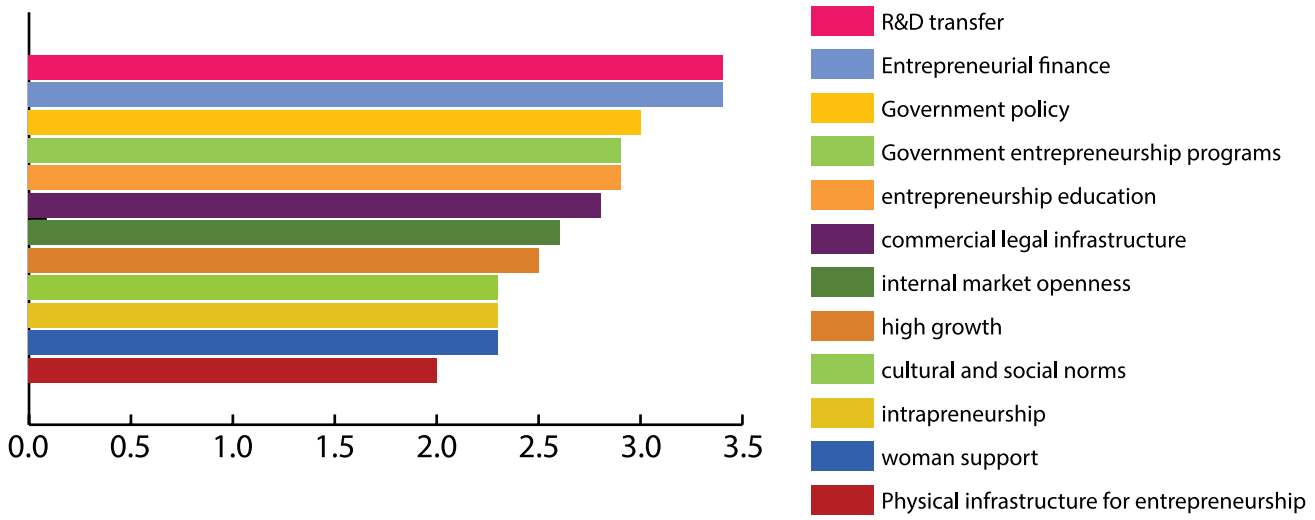
As Table 24 shows, finance, government programs and policies and education and market issues seem to be the most prevalent in constraining entrepreneurial pursuits in the artistic sector. It is also the case that those constraints are not localized to the creative artistic sector, but seem to run the full gamut of the creative industries.

Creative Industries vis-à-vis Other Industries

In view of the foregoing discussions about the constraints and problems confronting entrepreneurs in the creative industries, one could ask whether those are unique challenges and consequently whether unique policy interventions are required for the creative industries.

Figure 10 shows the results from the Caribbean GEM report 2011, which captures the views of national experts about important framework conditions for entrepreneurship in the Caribbean. Evidently, there seems to be a consensus among the national experts that the important conditions needed for entrepreneurship in the region are lacking. For instance, among the least developed conditions are research and development transfer channels and mechanisms, entrepreneurial finance, government policy and government entrepreneurship programs. This is consistent with the views of the national experts on the creative industries, consulted for this study. However, as discussed subsequently, creative industries must confront some unique challenges and consequently, the design and implementation of policy for medium, small and micro enterprises ought to reflect the nuanced differences in needs among creative entrepreneurs and other types of entrepreneurs.

Figure 10: Perceptions of Entrepreneurial Framework Conditions



Both Jamaica and Trinidad and Tobago have recently announced their MSME policy, and both seem to have addressed the fundamental issues that the experts in the GEM 2011 identified. For example both countries will seek to implement policies for entrepreneurs in general relating to the following dimensions:

Improving business environment (including a new definition in Trinidad and Tobago called 'mini-micro' which account for owner/managers enterprises that are popular in the creative industries);

Enabling more widespread finance to small, medium and micro businesses

Business development strategies and support

Women, youth and physically disabled and other people in special circumstances.

But notwithstanding the similarities between creative industries and the general small micro-entrepreneurs, there are some challenges still unique to the creative industries, which necessitate tailored or individualised policy solutions. As Brandellero and Kloosterman (2010) demonstrated, a fundamental challenge besetting the creative industries concerns balancing market forces with the time, agency and latitude creative entrepreneurs require to bring about innovative and imaginative products. This is an entirely different context and construct from a small commodities based manufacturer, who like the creative entrepreneur may face financing challenges, but their problem of accessing such funding are markedly different. The researchers further demonstrated, using the context of the Netherlands, that an activist entrepreneurial state is essential for the survival and growth of the creative industries.

6

EMERGENCY THEMES AND INSIGHTS SPECIFIC TO CREATIVE INDUSTRIES

This research study is really oriented to present insights and answers to the following issues:

- How entrepreneurs in the creative sector perform and what is needed for their further advancement;
- Examination of the underlying factors behind innovation, entrepreneurship and growth;
- Extraction of lessons which are applicable to this emerging industry and those that might be extrapolated to other industries.

The data results along with the review of literature have enabled a clearer picture of the state of play in the Caribbean creative industries and are indicating a viable pathway to move forward.

Finance as constraint on creative innovation, growth and entrepreneurship

The literature review revealed that in other regions globally, financial constraints represent a deep-rooted challenge for entrepreneurs in the creative industries. This claim is further corroborated through the data findings elicited from stakeholders in the Caribbean creative industries. The literature purports that the central issue at hand is the intangible nature of creative goods, which makes their valuation incredibly difficult. This difficulty arises in part because of disjuncture between the main players in the financial system and actors in the creative industries, both operating in vertical silos without understanding the expectations of each other. So an important initiative moving forward is to convene rigorous consultations in a bid to breach the chasm that now disconnects the financial sector from the creative industries sector (e.g workshops and brainstorming sessions).

There are also issues of collateralization, especially among small firms when they seek to borrow from traditional financial institutions. It is not unexpected therefore that the overwhelming suggestion from most entrepreneurs in the sector across the region is for such financial issues to be redressed.

Narrow focus and limited managerial training among creative enterprises

The data results indicate that on average entrepreneurs in the creative industries earn less than USD 100,000 annually and employ fewer than 3

people. One implication of this finding is that the sector may not command a high political clout as a sector such as agriculture, which further perhaps helps to explain respondents view about the general inadequacy of governmental policies and programs toward the creative industries. Consequently, an indicative solution is for those in the creative industries to take measures to enhance their managerial and entrepreneurial training, which could put them in good stead to be more innovative practitioners and more strategic advocates for their industries. In Jamaica for instance, only 34.4% of the respondents indicated they received managerial and entrepreneurial training, 35.8% in Barbados, 36% in Trinidad and Tobago and the highest of 55.5% in Colombia. So the kind of managerial capabilities and organisational skillsets required to move the creative industries institutionally is perhaps absent given the low levels of managerial and entrepreneurial learning that current entrepreneurs have been exposed. So while other macroeconomic data demonstrate the overall significance of the creative industries to regional economies, it appears that these microeconomic and institutional factors constrain further development in the sector.

The foregoing explains, in part, the rationale for the seemingly narrow focus within each country on a specific creative sector. In Jamaica for example it is music, and in Barbados it would be jewellery. A cross-tabulation on the Jamaican scenario further reinforces the point; of all the creative industries enterprises that operate in the more popular 'creation' level of the value chain, only 37.5% of them have experienced any entrepreneurial or managerial training.

Finally, with the exception of the Edna Manley College's Arts management program, there are very few reputable others in the region that integrate learning of the arts and also the business side of the arts. Moreover, there is also a serious need for more teaching of creativity, ideation and innovation at every level of the education value chain.

Localisation of creative markets

The data results indicate a significant degree of focus on local markets among CCI entrepreneurs. This could be a function of the insufficient use of e-commerce platforms and generally of ICTs. Also, lack of awareness of the potential which exists in the Diaspora and other ethnic markets and relatedly, absence of sufficient support measures for accessing these markets, for building out efficient online platforms, difficulty in collecting income online (e.g. Paypal not universally accessible), the image of region as haven for cybercriminals, even where knowledge exists of value of e-commerce. All these are possible explanations for the overwhelming focus on national markets.

Poor monetisation of intellectual property rights at SME level

One of the defining results from the data analysis reveals that small scale entrepreneurs are not collecting as much revenue from intellectual property rights (IPR) compared to other revenue channels such as sales and direct provision of services to clients. In Barbados for instance, only 4.3% of the sample indicated that revenues from intellectual property rights account for more than 50% of their overall income. In Jamaica, just about 25% and 16.7% indicated that IPR accounted for 5% and 100% respectively of their total income. For Colombia 74.3% of the sample had no income from IPR, while only 7% had 100% income from IPR. And in Trinidad and Tobago, just about 25% of the sample indicated that 40% of their total income derives from IPR.

A further analysis of the data reveals that there were no statistical differences between those entrepreneurs who reported some form of business and entrepreneurial training and those without and the extent to which they both leverage IPR as an income source. It was already shown that a fair number of these creative industries entrepreneurs concentrate their efforts in areas such as music, fashion and visual arts, all areas in which IPR can be monetised. So it might be a reasonable conclusion that perhaps limited training in the area of IPR among entrepreneurs could be an explanatory factor accounting for the fairly low levels of income they derive from this lucrative source. There are other explanations, such as inadequate institutional arrangements to help creative professionals collect royalties from their work[7].

7 See as example, http://jamaica-gleaner.com/glean-

These challenges must be redressed, if these small creative enterprises are to become profitable and become major contributors to gross domestic product and to become major employers. Based on Vanus James' study in 2005, the IPR industries in Jamaica contributed US$464.7 million to the local economy (in 1996 producer's values prices), which represented just about 4.5% of GDP.[8] These are not non-trivial sums, and therefore no effort should be spared to help these smaller enterprises to also benefit from their IPR.

The policy suggestions for improving the intellectual property rights regime in Jamaica do not run counter to global trends that appear to clash with intellectual property rights regimes. Such global trends include open and common licensing, open business models etc. The nature of content piracy in Jamaica for example, and other developing countries, is somewhat different from what obtains in more developed countries that have high levels of broadband penetration and pervasive ubiquity of access devices. In these developing country contexts 'burning' of music albums and movies for re-sale is pervasive and these illegal goods are often peddled in clear view of law enforcement officers. This is just one example of a lapse in the enforcement of existing intellectual property rights regimes in the region.

Finally, it is not yet a settled matter as it concerns the net benefit of enforcing IPR rules globally. There are studies which suggest the cost of enforcement might outweigh the benefits of IPR, whereas, there are others which show a positive net benefit for countries that have enforced their IPR frameworks.[9] But as the Hargreaves report from the United Kingdom intimates, the ultimate challenge for IPR regimes globally, in the broadband era, is a matter of balancing the competing interests of the rights owners with those other potential users in an interconnected content ecosystem. So the challenge for Caribbean and other regional countries regarding IPR is how to devise an adaptive framework which minimises the transactions costs of IPR compliance, but which maximises the net benefit owed to the creators and architects of new knowledge and content[10].

In conclusion, it must be noted that the Caribbean region represents one of the most culturally imaginative and diverse regions in the world; a region composed of Small Island Developing States (SIDs), vulnerable to the vagaries of cyclonic activity and rising sea levels, mostly dependent on international markets for its energy supply and tourism revenues, this is a region whose wealth lies in the fertile fields of the creative imagination. These countries must therefore take every step necessary to ensure their creative entrepreneurs, artists, ideators, are able to appropriate the rents that accrue from their intellectual products. That is to say, strengthen intellectual property rights regimes and adapt, however necessary, to safeguard the interests of these workers. The only acoustic musical instrument invented in the 20th century emerged from Trinidad and Tobago, yet the rights accruing to the instrument are held outside of the region. And, continues to be legally contested by individuals and institutions both within and external to the region. Caribbean countries must therefore critically appraise so-called new waves of 'open innovation' and 'open licensing', against the background that the evangelists of this new idea generally emerge from countries and regions that have already benefitted and developed from the appropriation of IPR in their own societies, for decades. This issue needs further unpacking and more interrogation and research.

Poor perception of government policies and programs

The views arising from the national experts point to inadequate government support to the creative industries and to the entrepreneurs who operate within the many creative sectors. Three dominant themes were forthcoming from the experts; one of those is that government policies do not consistently favour new and emerging firms (for example in public procurement). In Jamaica, there is in fact a MSME procurement policy, which was designed with the explicit aim of easing the compliance burden on small firms so that they may participate in government procurement exercises. However, the policy is hardly ever implemented and there is very little awareness of it, even among Government en-

er/20130825/lead/lead1.html

8 See, http://www.jipo.gov.jm/sites/default/files/PDF_Files/wipo_study.pdf

9 See, http://www.wipo.int/export/sites/www/freepublications/en/economics/1031/wipo_pub_1031.pdf

10 See, http://www.ipo.gov.uk/ipreview-finalreport.pdf

tities and agencies.

According to the experts there are institutional government deficiencies particularly at the level of getting the necessary government permits and other documentation that are crucial to operating their businesses. And a corollary of this argument is that the taxes on small creative enterprises is burdensome and consequently constrains enterprise expansion. It is possible that these challenges stemming from the inadequacy of government programs and policy are not unique to the creative industries sector, but could be the experience of other micro, small and medium enterprises regionally.

7

POLICY RECOMMENDATIONS

Both the Adult Population Survey and the National Experts' Survey reveal important trends in the creative industries in the Caribbean as well as the viewpoints of several experts in the area. The ensuing points therefore represent general recommendations to problems uncovered in the data as well as the opinions of those experts on potential mechanisms and ways to redress the problems identified:

1. There is a significant breach in the communication channel linking the financial sector and the creative industries sector. For this reason, there is a need for specialised interventions to help the financiers in the traditional financial sector to better understand the business models and value creation processes in the creative industries, as a way of helping to direct debt funding and or even equity funds into these industries;

2. A tradition of observing Intellectual property rights in the Caribbean region needs to be strengthened through public education interventions among the entrepreneurs themselves and institutional strengthening of IPR regimes at the policy and governance levels;

3. Grant funding from government and other international financial institutions are critical to solving the peculiar financial challenges confronting local creative entrepreneurs;

4. More coordinated and sustained initiatives to collect data on the creative industries across the region is needed. This could be coordinated at the level of the CARICOM Secretariat;

5. More active implementation of policies geared at prioritising micro, small and medium enterprises (MSME) in public procurement exercises;

6. There is a need to leverage the information and communications technologies as platforms for delivering capacity building courses in important areas such as intellectual property rights, business management and marketing;

7. Promote the use of digitalisation and other ICT tools at every level of the creative industries value chain as a way to break into international markets in fast growing areas such as animation, digital arts, etc;

8. Regional governments must expedite the process of drafting and promulgating venture capital policies in order to provide a coherent and predictable environment for potential investors who operate outside the traditional financial and banking system;

9. Although the University of the West Indies, Mona, has started outreach to build competence in animation, more sustained, broad-based and systematic interventions are needed to coordinate the transfer of research and development insights from the regional Universities to entrepreneurs in the regional economy;

10. More academic entrepreneurship courses are needed within the Caribbean region, specifically at the level of high school and university;

11. Clusters and collaboration play defining roles in facilitating creativity and innovation in other regional centres such as in Europe, and which is facilitated through information dissemination via regional innovation networks. Similarly, the Caribbean region ought to develop a regional creative industries network as a mechanism to diffuse information to enhance the odds of creative entrepreneurs taking advantage of opportunities outside of their own national markets;

12. The Caribbean Diaspora did not emerge in the data results at all, and for this reason greater awareness needs to be made among creative industries enterprises about the potential of the large Caribbean Diasporic markets that exist in places such as Canada, UK and the USA;

13. Greater need for increased formalisation, training and business planning within the creative industries.

14. Explore the optimal way to help high school students in the Caribbean learn the mechanics of entrepreneurship (making the subject available at CXC and CAPE or integrating the subject into the general curriculum throughout high school are possible options);

15.Caribbean stakeholders need greater engagement with and involvement in global networks of arts and management, as a mechanism learning and inculcation of the global best practices and ideas;

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