The T &T Foresight Project

NIHERST

Sector Foresight Project:

CREATIVE

Chapter 2:

T&T Capability & 'Best Bets'

Keith Nurse, Jacqueline Morris, Michele Reis, Chanzo Greenidge &Nick Marsh

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CONTENTS

INTRODUCTION

These sector foresight projects are proceeding through a 5 Chapter Process. Chapter 1 focused on using global foresight to identify potential niche growth opportunities in each sector.

In Chapter 2, we examine the capabilities T&T has available to match selected global niche opportunities and any gaps that need to be addressed to be able to convert these opportunities into a commercial business investment proposition that will provide longer term economic benefits for T&T and help advance the country towards the Vision 2020 goal of achieving developed nation status.

As part of this Chapter 2 work, a number of 'Best Bet' areas were selected by specialist Trinidad and Tobago consultants who researched the capabilities and gaps associated with them. This document is a synthesis of the work done by the local consultants and the sector workshop outcomes compiled by NEXT.

In late July, these Best Bet areas were discussed and refined into more specific first draft 'Best Bet' business cases by a number of key stakeholders from both the public and private sectors at sector foresighting workshops.

In Chapter 3 of the sector projects, the first draft 'Best Bet' business cases from all the five sectors being researched will be short-listed further into more defined propositions. In Chapter 4 these propositions will be developed into detailed business cases that can be put in front of investors. The final Chapter involves a process which endeavours to convert at least some of these detailed business cases into commercial ventures.

SECTION A

This section contains edited content from report material compiled by Dr Keith Nurse, Dr Jacqueline Morris, Dr Michele Reis, and Mr Chanzo Greenidge who are associated with the creative sector in Trinidad & Tobago.

1 Creative Sector Overview

1.1 <u>Introduction</u>

The requirements of technological and institutional innovation are applicable to firms and industries in both developed and developing economies, although it is recognized that the needs are greater among the latter countries given their weak market power. It is also noted that critical elements of industrial upgrading, for example, learning and knowledge accumulation, often evade market supply.

The creative/cultural industries sector also has some peculiar challenges. The sector is often negatively impacted by the problem of externalities because of the difficulty of excluding free riders, for example, in activities like festivals. Creative industries are prone to copyright infringement (e.g. piracy, counterfeiting, etc.) that impacts on the return on investment. Public investment and corporate sponsorship in the cultural industries are often blocked for socio-political reasons.

1.2 <u>Aims and Objectives</u>

The aim of the Foresight and Innovation Strategy project on the Creative Industries in Trinidad and Tobago is to develop a 'best case' scenario for the sector and to outline a range of technology and policy innovations which if implemented would boost the exports, employment and GDP contribution of the sector. The scenario is based on a best-case picture of how the sector could look in 2016 in TT. It includes a technology-innovation roadmap showing the key requirements for commercial development including:

- R&D investment pathway.
- Specialist skills and human capability.
- Culture, attitude, leadership.
- Government support through a variety of requirements:
    - STI research funding
    - Training and human resource development
    - Access to credit, e.g. loan and venture capital
    - Trade facilitation and market access grants
    - Business support services, incubation, clustering, etc.
    - Alignment of trade, industrial and Intellectual property policies with technology and innovation strategies.

The project identifies key niches within the Creative Industries sector which are considered to have strategic value in terms of market and commercial development and for which innovation and technology policies can be implemented to facilitate growth in the Creative Industries sector and to promote diversification in the Trinidad and Tobago economy. These niches are chosen for several reasons:

- Trinidad and Tobago has significant capability and untapped potential in the niche.
- The global market and consumer demand is growing and provides good returns on investment for the niche.
- The niche could be competitive in the global markets.

1.3 Creative Sector Foresight and Innovation Strategy Scenario

Six sub-sectors (see table 1 below) in the creative industries have been selected for investigation and intervention. The rationale for the selection is that these sub-sectors are key drivers in creating demand and improving the overall marketability of the creative industries. They have the capacity to propel other sub-sectors along. For example, music videos have been identified because they provide the demand-pull not just for music recordings but also for the audio-visual sector and the performing arts.

The study is based on building a ‘best case’ picture of how these sub-sectors could look in Trinidad and Tobago in ten years time if the required kinds of investments and interventions are made to upgrade the technological capabilities of the sector. It focuses on answering four key questions:

- Where will the global sector (and key sub-sectors) be in ten years time?
- What sector capability is there in Trinidad and Tobago today in each of the sub-sectors?
- How could these sub-sectors be developed commercially over the next ten years and what is the roadmap for investment and intervention?
- What would the economic impact be on Trinidad and Tobago in ten years time if the ‘best case’ scenario was implemented?

Table 1: Selected Niches in the Creative Industries Sector

Selected Niches	Description and Rationale
Pan Instruments	Pan instruments are the largest visible or merchandise export in the Creative Industries sector. Expanding demand and international competition requires greater attention to technological change, innovation strategies and market development. The focus will be on the synergy between pan instrument manufacture, distribution, sales and exports.
Pan Performances	Pan performances is one of the key service exports where Trinidad and Tobago has supply capabilities given the large number of steelbands and pan ensembles. This niche has untapped international demand and strong demand pull for other aspects of the Pan industry (e.g. pan recordings, pan education, etc). The growth of the niche has a strong potential impact on youth employment.

Music Internet	The future of the music industry is in the digital marketplace. The music industry has been revolutionized by the growth of the Internet. The Internet serves as a key mechanism for promotion, distribution, broadcasting, downloads and *e*-commerce sales. Investment in this niche is key to overcome the traditional challenges such as weak distribution, media access, international sales and piracy.
Audio-visual – Music Videos	The audio-visual sector is a key area for investment because market development is highly dependent on imaging and media access. Music videos are a key promotional device for the music industry and the country as a whole. The cost of doing music videos in the international market is prohibitive and so it is critical to upgrade the technological capabilities of the audio-visual sector (film, television, animation and multimedia).
Mas Costuming and Design	Masquerade costuming and production is a key feature of the branding of the Carnival Industry and the country as a whole. Design capital along with business strategy is critical to the future development of the sector and its international competitiveness. The focus will be on increasing the local value-added in Mas costume production and exports as well as facilitating trade in design services and intellectual property.
Fashion	The fashion industry embodies a range of artisinal, manufacturing and professional services for which design capital and intellectual property are key assets. This niche has strong export capabilities especially in clothing, textiles, jewellery and cosmetics. There are also strong synergies with the other aspects of the creative industries, for example, Mas costuming and design.

1.4 Global and Local Context for Foresighting the Creative Industries

The cultural or creative industries are aesthetic, identity and copyrightable goods, services and intellectual property. It involves the economic activities of artists, arts enterprises and cultural entrepreneurs, for-profit as well as not-for-profit, in the production, distribution and consumption of film, television, literature, music, theatre, dance, visual arts, Masquerade, broadcasting, multimedia, animation, fashion and so on. The cultural and creative sector plays a dual role in society: it is a fast growing sector of the new knowledge and digital economy and a means of bolstering cultural identity and confidence.

The cultural/creative industries sector is one of the key growth sectors of the world-economy. Global trade in the sector grew from 39 billion to 59 billion between the years 1994 to 2002. Estimates value the sector at 7 per cent of the world's gross domestic product and forecast suggest the sector will grow by 33% in the next four years[1]. The global market and consumer demand is growing and provides good returns on investment for the niche.

The growth in the cultural/creative industries is accounted for by rapid techno-economic change in products, distribution & marketing (e.g. *e*-books, IPods, iTunes, Amazon.com, Google) and the increasing commercialization of intellectual property in the digital world (e.g. digital rights management). The convergence of media and the expansive growth of the digital economy (e.g. the Internet and *e*-commerce) allows for easier production, distribution, consumption as well as infringement (e.g. piracy, file swapping) of cultural products, services and intellectual property[2].

Intellectual or artistic production is at the heart, while reproduction is a manufacturing process responding to the logic of industrial production. Market risk is high because consumer taste is volatile and difficult to anticipate. The life cycle of products and services is very short and there is a need for constant innovation. Each entertainment product is typically a 'one-off'. In short, creativity is about betting on talent and innovation and should be viewed as research and development as the following quotation from WIPO illustrates:

The cultural industries depend strongly on creative inputs. Creativity plays the equivalent role in the creative industries to that of innovation in other sectors of the economy. Just as firms in manufacturing have outlays on research and development (R&D), so firms in the creative industries search for new ideas and talented workers to supply them (WIPO 2003).

The cultural/creative industries require heavy levels of marketing as well as investment in the creation of art forms and the upgrade of artists. As table 2 shows the music industry with 15% of sales allocated to artists and repertoire (A&R) has one of the highest levels of R&D to sales ratios when compared with industries like chemicals, aerospace, health, computer software and the pharmaceutical industry.

Table 2: R&D in Music Compared to other Industries

Sector	R&D as % of Sales
Chemicals	4.1
Aerospace	4.6
Health	7.2
Computer & Software	10.3
Recorded music	15.0
Pharmaceutical	15.1

Source: Recording Industry Association of America (www.riaa.com)

.[1] UNCTAD, *Creative Industries and Development*. Paper presented at UNCTAD Eleventh Session, Sao Paulo, June 2004 (TD(XI)BP/13); for estimates of growth see PriceWaterhouseCoopers, *Entertainment & Media Report, 2005 – 2009* which provides global analyses and market forecasts for 14 industry segments, including television networks (broadcast and cable) and distribution (station, cable and satellite), filmed entertainment, recorded music, video games, radio, books, newspapers and magazine publishing, as well as advertising, theme and amusement parks, and sports..

[2] See K. Nurse, "Copyright and Music in the Digital Age: Prospects and Implications for the Caribbean" Social and Economic Studies 49.1 (2000): 53-81.

1.5 The Case of Trinidad and Tobago

The cultural/creative industries sector of Trinidad and Tobago is dynamic and multifaceted given the long history of globalisation of various art forms and the plurality of ethnicities. For example, the country has the most trans-national carnival and generates more genres of music than any other territory in the region. Based on these attributes the sector has experienced some expansion in industrial and export capabilities in the last decade. The sector makes an important contribution to the economy in terms of employment, exports and foreign exchange earnings[3]. The sector also has a significant spill over effect on the domestic economy, especially for the tourism, media, retail, food and beverage, ground transport, hotel and airline sectors.

The business environment for the creative industry sector has suffered from a lack of investment capital, managerial talent, business support and a weak institutional framework in terms of industrial, trade, intellectual property, technology, and innovation policies. Low levels of media access, copyright infringement, weak distribution channels and foreign competition also plague the sector[4].

The development of technology policies and innovation strategies is vital to respond to the challenges and opportunities of contemporary globalization. International best practice suggests that sustained global competitiveness entails industrial upgrading, human resource development, institutional capacity building and the alignment and harmonization of the business and governmental environment.

2 Creative Sector Capabilities & Enablers

Because of the complexity of the creative sector, it was decided that the best approach to the Chapter 2 work would be to hold a series of workshops, each with a specialist focus, to develop a collective view.

The following sections report the outcomes of those workshops.

2.1 The Workshop Approach

Dr Keith Nurse and Joanna Ross summarised the approach as follows:

2.1.1 Objectives of Sessions:

- To identify critical success factors of the sector
- To develop “best-bet” options
- To outline a stakeholder strategy for the sector
- Outline a range of technology and policy innovations which [could] boost the competitiveness, exports, employment, and GDP contribution of the sector.

[4] The creative industry sector has been researched by several national, regional and international organization. The main sponsors of the research have been TIDCO, Caribbean Export Development Agency, UNCTAD/WIPO, Caribbean Regional Negotiation Machinery, CARIFORUM.

Each session commenced by introducing participants to the concept of foresighting and the role of NIHERST in promoting foresighting.

The NIHERST role

- Ms. Lee Young alluded to the fact that the long-run competitiveness of Trinidad and Tobago's cultural industry lies in its ability to harness and institutionalise the innovative capacity of its people.
- NIHERST, being concerned with building national scientific, technological, research, and innovative capacity[5], has employed foresighting as a mechanism to facilitate the institutionalisation of the creativity of the nation's human resources.
- The model of foresighting used by NIHERST has been pioneered by New Zealand, and extends to industries apart from that of Mas production and design e.g. food and beverages; manufacturing, and biotechnology.
- To date, the local foresighting effort has seen:
    - Innovation studies being conducted on firms in the food and beverage industry (with plans being made to extend these studies to other industries).
    - Sectoral studies being conducted with the intended formulation of a National Strategic Framework.
    - The development of a local foresight and innovations website: http://www.ttfi.net .

Foresight and innovation in the creative industries

- This overview was presented by Dr Keith Nurse
- Essentially, the presentation sought to introduce participants to the concept of foresighting and its relevance to the future-oriented strategic planning of the domestic creative and cultural industry.
- Highlighted the fact that the domestic creative and cultural industry made the greatest (industry-wide) contribution to local innovation.
- Made the point that innovation was integral to keeping pace with the international market, and, in addition, it was essential that (we) plan for innovation if the industry's competitive advantage is to be maintained and increased.
- Key elements of PowerPoint presentation:

    - <u>Aims of (Foresighting) Project</u>:

        - Establish critical success factors.
        - Develop 'best-bet' options.
        - Outline a stakeholder strategy.

    - <u>What is Foresighting</u>?

        - Examination of Global Trends (opportunities and threats).
        - Industry Analysis (industry strengths, weaknesses, structure, and operations).
        - Interactive Workshop (feedback, discussion of the critical

[5] Message from Hazel Manning

success factors to the industry, formulation of best-bet options for the industry, and division of labour).
    - Formulation of a Strategic Innovation Plan.

- Ten Years of Growth in Trinidad and Tobago Carnival Visitor Arrivals:

    - Data represented a 53% growth rate between 1997 and 2006.

- Ten Years of Growth in Trinidad and Tobago Carnival Visitor Expenditures:

    - Data represented a 148% growth rate between 1997 and 2006.

- Sectors being Examined:

  Within the cultural industry, the following sectors were specifically highlighted:
    - Masquerade production & design.
    - Fashion production & design.
    - Steelpan production.
    - Steelpan performances.
    - Music Internet.
    - Music Videos.

  Many of these sectors, for instance Mas production & design and fashion production & design, were described as composite sectors owing to the diverse nature of the activities involved in generating related products.

- Definition of Cultural & Creative Industries:

  The production, distribution, and consumption of copyrightable goods, services, and intellectual property embodied in film, television, books, music, theatre, dance, visual arts, works of Mas, fashion, multimedia, animation, etc.

- Roadmapping the Sector:

    - Requires a PEST Analysis, TOWS Analysis, Stakeholder Analysis, and Roadmap.
    - The PEST, TOWS, and Stakeholder Analysis were presented by Dr. Michele Reis, and were based on the findings of a previous study/interviews done with industry professionals.
    - Developing a roadmap entailed identifying the critical success factors to the sector, the best-bet options needed to transform the sector, and predicting the sector's future division of labour. Participants at the workshop collaborated in discussing the critical success factors and best-bet options.

- Key Challenges facing Cultural & Creative Industries:

    - Shortfalls in human resource development
    - Under-investment in the private and public sectors relative to existing and potential returns.
    - Limited appreciation of the value of Intellectual Property by entrepreneurs.

- Emerging Opportunities for Creative Industries:

    - Rising demand for domestic & regional content.
    - Growth in alternative musical genres.
    - Digitalisation of cultural content.
    - Emergence of new markets (e.g. electronic communities, diasporic exports, intra-regional markets, South-South markets).

Tools and processes

Dr. Michele Reis essentially initiated the road-mapping exercise for the sector by presenting a preliminary PEST and TOWS Analysis. The PEST Analysis examines the **P**olitical, legal, and institutional; **E**conomic and market; **S**ocial**,** cultural and Demographic; and **T**echnological factors and issues that are most relevant to the operations within the sector.

The TOWS Analysis identifies those Threats and Weaknesses that are inimical to the competitive advantage of the sector, and those Opportunities and Strengths that should be reinforced to maintain and enhance competitive advantage. The Threats and Opportunities are derived from the external environment, while the Strengths and Weaknesses are inherent to the sector.

2.2 Mas Production & Design

This workshop was held on June 22nd, 2006 at the Chaconia Inn Hotel in Port of Spain, Trinidad. The presenters were Ms Joycelyn Lee Young, Dr Michele Reis, and Dr Keith Nurse.

The outcomes from the workshop are summarised in the following sections.

2.2.1 TOWS Analysis

THREATS	OPPORTUNITIES	WEAKNESSES	STRENGTHS
• Importation of costumes from the Far East.	• Demand for Trinidadian Mas designers, artisans etc.	• Insufficient govt. support.	• Natural and artistic capability and talent.
• Vast amounts of cheap labour from China, Taiwan and India.	• Flourishing regional carnival market.	• Insufficient institutional support.	
	• Expanding diasporic market overseas.	• Weak business sponsorship.	
		• High duties and taxes on imported fabric and materials.	
		• Lack of protection for designs.	
		• Lack of recognition of the Mas industry as a viable sector.	
		• Lack of quantitative data on the sector.	•

2.2.2 PEST Analysis

POLITICAL/ LEGAL/ INSTITUTIONAL	ECONOMIC AND MARKET ISSUES	SOCIAL, CULTURAL AND DEMOGRAPHIC FACTORS	TECHNOLOGICAL FACTORS
• Disproportionate investment in carnival costuming and design relative to country's economic returns.	• Expansion of international and regional carnival and festival markets.	• Those involved in Mas costuming and design continue to experience myriad problems, including the need for institutional support, financing, etc.	• Some measure of technological innovations required in the fabrication of large costumes. This requires researching new materials and products that will enhance both the structure of the costume as well as the performance at carnival shows.
• Low sector visibility relative to other sectors such as the energy sector.	• The Caribbean Diaspora constitutes an important market for arts and popular culture.	• Returning nationals represent a significant proportion of Masqueraders.	• Growth of the Internet presents new options for production and marketing.
• Low priority given to investing in the arts.	• Mas costume and design represents an opportunity for destination branding; and cultural industry development.		
	• Successful festivals generate healthy returns on investment.		
	• Industry, through proper management and marketing, can be an important driver of local, regional, and international employment.		
	• Caribbean festival arts and carnival in particular have achieved international acclaim.		

2.2.3 Strategic Direction for the Mas Sector

- Involved discussion about five (5) target markets and related marketing strategies.
- The target markets presented were advocated as being integral to the future success of the sector.
- The following table reflects the key target markets, product/s, services and intellectual property that should be exploited to 2016.

TARGET MARKET		TARGET PRODUCT/SERVICE & INTELLECTUAL PROPERTY
1.	Trinidad Carnival – P.O.S. and other regional carnivals in districts outside of P.O.S.	• Small costumes for sections of bands • Larger Individual costumes (Kings, Queens, etc.).
2.	Caribbean Regional Carnivals.	• Small costumes for sections of bands • Larger Individual costumes (Kings, Queens, etc.). • Designs and/or subcontracting of production.
3.	Diasporic Carnivals in North America and Europe.	• Small costumes for sections of bands • Lager Individual costumes (Kings, Queens, etc.). • Designs and/or subcontracting of production.
4.	International Events/ Festivals.	• Small Costumes. • Larger Individual costumes. • Designs and/or subcontracting of production.
5.	Non-festival activities, e.g. theatrical productions, corporate designs, interior decorating, interior decorating, refurbishing of public spaces.	• Designing sets of local and overseas theatrical and musical productions. • Designing costumes for theatrical and musical productions. • Designing décor for public spaces.

Target markets

More emphasis was placed on discussing issues specifically relating to the respective target markets, than on devising concrete marketing strategies for each target market:

- With regards to **Target Markets 2 and 3**, it was established by the participants that:
  - o The size of the bands influenced the percentage of work done internationally. Generally, small bands do more regional work. Regional markets are crucial to their share of earnings.
  - o The domestic market accounted for a greater share of earnings in larger bands. For example, the representative for Harts estimated that ninety percent (90%) of the band's production is done for the local market.
  - o It was also noted that cottage industries have emerged for diasporic (and regional) markets whereby individual, independent of formal bands, produce the components for regional and diasporic bands, for

instance belts, or headpieces.

  - Inimical to the continued penetration of Trinidad and Tobago's Mas exports to international and regional markets is the increasingly strict regulations and rules surrounding exports and design of Masquerade products by Trinidadian and Tobagonian designers. Participants noted the increasing trend of rules prohibiting the importation of fully assembled costumes.

- With regards to **Target Market 5,** participants identified initiatives made by designers and producers to contribute to public art:
  - For instance, the creation of miniature dolls wearing Mas, as well as costumes used to decorate the local airport.
  - It was also noted that smaller bands exhibit greater participation in non-festival and non-traditional activities, such as costuming for sports teams, and decorative art.

2.2.4 Competitive Advantages for T&T:

In accounting for the competitive advantage of Trinidad and Tobago's Carnival and Masquerade, the participants were able to bring to light additional strengths that are inherent to the sector, or elements constituting the competitive advantage of the Carnival. The following identifies strengths specifically relating to the Trinidad and Tobago Carnival:

The experience:

Participants suggested that the attractiveness of Trinidad and Tobago's Carnival lies in the fact that it represents not only the Masquerade but an all-inclusive experience.

It was suggested that Trinidad and Tobago's Carnival experience may be richer than others because of the fact that it is comparatively less regimented than other Carnivals. Visitors, regardless of whether they are members of a band, are encouraged to participate in activities. This encourages persons to continue visiting.

The nature of the Masquerade:

Unlike other Carnivals as festivals whose Masquerade is predominantly comprised of floats, Trinidad and Tobago's Masquerade is kinetic, thereby allowing for ease of movement.

The hospitality of the people:

The participants highlighted the fact that the warmth of the people of Trinidad and Tobago is a significant pull factor for visitors to the Carnival.

2.2.5 Additional Strengths

The following lists additional strengths identified by the participants, specifically relating to Trinidad and Tobago's Masquerade production and design:

Critical Mas:

It was highlighted that Trinidad and Tobago is viewed by producers of other regional and diasporic carnivals as a one-stop-shop for Carnival supplies and expertise.

Skilled and experienced labour:

Owing to the long historical tradition that is the Trinidad and Tobago Carnival, Masquerade producers and designers have Mastered the art of design and engineering which gives them a competitive edge over external competitors.

Dynamic nature of Trinidad and Tobago's Carnival:

Participants highlighted the dynamic nature of Trinidad and Tobago's Carnival. The dynamic nature of the local brand of Carnival was accredited to the fact that it is more of a cultural expression than a tradition. Thus, though the Carnival emerged out of historic circumstances, thereby having folk origins, the form of expression is continuously evolving, thereby embracing new or revised themes.

The evolution of Trinidad and Tobago's Carnival and the carnival experience has resulted in the crossover of external cultural forms, for instance, the infiltration of hip hop into indigenous soca. Participants cited such as resulting in visitors feeling more connected to local Carnival.

2.2.6 Future Scenarios and 'Best Bet' Options

- Participants identified (i) the Best-bet Options for transforming the sector; and (ii) the Critical Success Factors for the sector.
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- Essentially, participants formulated four scenarios that could be possible by 2016. These scenarios were related to the best-bet options that were formulated:

		SCENARIOS		
CORE ACTIVITIES	A	B	C	D
Design	UK	TT	TT	TT
Production	China	China	TT	TT (specialised production)
Sub-Contracting		China	China	China
Franchising	TT	UK	UK	UK
Sourcing Inputs	India, China,US	UK	UK	UK

Integral to the formulation of best-bet options is the issue of value-adding and the identification of those activities which add the most value to the sector. Essentially, such activities would contribute the most to the maintenance or enhancement of competitive advantage. **Scenario A** is not a best-bet option for the sector. Local designers and producers add no value to inputs and production as all activity is devolved to foreign actors. In addition, this option would add little to national economic development as no inputs are produced locally.

2.2.7 Key Issues and Factors

The following encompasses the issues and factors identified in the best-bet options for transforming the sector:

Development of domestic manufacturing capabilities:

It was suggested that the competitive advantage of the sector could be enhanced through the development of domestic manufacturing capabilities. The development of manufacturing capabilities should be considered together with the fact that China has a considerable competitive advantage (that is not likely to diminish) in terms of manufacturing. At the nucleus of their competitive advantage lies their considerable supply of cheap labour. **Scenario C** presents the option of full-scale domestic production.

Outsourcing:

Giving consideration to the competitive advantage that China has in manufacturing, it was suggested that a best-bet option for the sector would be the outsourcing of production. By outsourcing the production of the finished product, the sector could concentrate its efforts on enhancing its competitiveness in other value-adding activities.

It was suggested that the sector should not concentrate its activities on competing with China's manufacturing capabilities, but owning the intellectual property (designs) which contribute the most to value added. Having ownership of the intellectual property would make outsourcing production a better option. **Scenarios A and B** present the possibility of outsourcing production to Chinese manufacturers.

Outsourcing production carries the risk of diminished control by local designers and producers on the quality of the final product.

Specialised Production:

This option presents the prospect of focusing on the production of specialised areas (for instance head pieces), while outsourcing other uncompetitive areas. It facilitates the enhancement of competitive advantage, especially when combined with the retention of design as a core activity. The option of specialised production and retention of design as a core activity was reflected in **Scenario D**.

Retaining design as a core activity:

The licensing of intellectual property and design/prototyping make the greatest contribution to value added. It was therefore suggested that a best-bet option for 2016 would be for the sector to strengthen and retain its design capacity, while outsourcing other relatively uncompetitive areas such as production. This option was presented in **Scenarios B, C, and D** of the table.

Focusing on the design element of its product could facilitate the enhancement of the sector's competitive advantage by 2016.

2.2.8 Critical Success Factors

The following factors were identified as being critical to the success of the sector. They were especially relevant to success under **Scenario D.**

Training:

- Critical to the sector's human resource development.
- Participants suggested that specific sector-related training ensue at each level of education – primary, secondary, tertiary, and professional-type training.

- Participants identified the importance of training youth and integrating them into the planning process to the sector's continued ability to innovate.
- Participants highlighted the shortfall with current training programs for youth in costume design. Participants suggested that current training programs for youths would not facilitate sustainable enhancement of the human resources in the sector since they were too short in duration. They suggested long-term programs in which trainees could specifically be instructed in the use of tools. Having learnt the fundamentals in Mas design, trainees could then create costumes for display at Carnival time.

Design, prototyping:

- Key capabilities of the sector, which adds the most value to the product, and contributes a great degree to competitiveness.
- Development of the design capability can be linked to the development of the sector's research and development capability, marketing capability, and training.

Research and development:

- Government-sponsored research and development in the cultural industry.
- It was suggested that a Cultural Research and Development Facility be developed which could be affiliated with some of the country's technical institutes. For example, the John Donaldson Technical Institute.

Development of specialised manufacturing technology and capabilities

- To back up the sector.

Marketing:

- Includes the marketing both within the domestic and export markets of costumes and designs, establishment of trademarks and copyrights.

Development of service standards:

- Participants identified the importance of establishing standards of service related to local Mas. This would be necessary in attempting to enhance the Carnival experience, which was identified as a strength of Trinidad and Tobago's Carnival, in turn facilitating increased visitor arrivals.

2.3 Fashion Production and Design

This workshop was held at the Chaconia Inn Hotel in Port of Spain on June 26, 2006. The presenters were Ms Joycleyn Lee Young, Dr Michele Reis, and Dr Keith Nurse.

The outcomes from the workshop are summarised in the following sections.

2.3.1 TOWS Analysis:

THREATS	OPPORTUNITIES	WEAKNESSES	STRENGTHS
• China factor – large-scale importation of clothing from the Far East.	• Regional fashion market in the Caribbean.	• Lack of government support.	• Natural artistic capability and talent.
• Competition with regards to the large supply of cheap labour from Taiwan and China.	• Diasporic overseas market.	• Insufficient institutional support.	• Fairly large domestic market.
	• Loyal returning nationals.	• Weak business sponsorship.	• Untapped diasporic market
		• High duties and taxes on imported fabric and materials.	• d. Diversity of design talent.
		• Lack of protection for designs.	• Linking of fashion industry to pageantry in Trinidad and Tobago.
		• Lack of recognition of the fashion industry as a viable sector.	• Linking of fashion industry to carnival industry.
		• Lack of quantitative data on the sector.	• Linking of fashion industry to interior design and home furnishings, as well as sport.
		• Lack of skilled labour.	
		• Poor work ethic.	

2.3.2 PEST Analysis

POLITICAL/ INSTITUTIONAL	ECONOMIC AND MARKET ISSUES	SOCIAL, CULTURAL AND DEMOGRAPHIC FACTORS	TECHNOLOGICAL FACTORS
• Fundamental issue is the misperception by government and businessmen that the fashion industry is not lucrative. This has resulted in inadequate institutional and political support, and, consequently, little investment in the industry.	• Low production levels affect both the local market and export capability.	• Poor public perception of the fashion industry.	• R&D and Innovation are crucial to the advancement of the industry. • Research should encompass ascertaining the number of garment manufacturers, their capacity and location. Consequently, this research could facilitate the greater synergies between designers and clothing manufacturers.
	• Limited presence of local designers at international trade shows due to lack of investment.	• Wide-ranging availability of cheaper, trendy clothing from the Chinese market is crippling the local garment manufacturers.	• Technological upgrading is critical to the maintenance of local designers export levels.
	• The great degree of risk involved in establishing a business within the industry creates difficulty in designers securing credit facilities and funding.	• Need for a “Buy Local Drive” targeting persons with large disposable incomes.	
	• A need to address the problem of accreditation of designers and introduce a period of apprenticeship of newcomers with more established designers.	• Versatility and diversity of designers cater to a wide demographic grouping.	
	• Need to standardize sizes to complement the Caribbean woman.		
	• Lower duties and taxes on the importation of fabric. There is a need for tax incentives for designers who use their skill to assist the community; introduction of tax-free areas to move production outside PoS; assistance with freight and customs clearance for exports.		

2.3.3 Strategic Direction for the Fashion and Design Sector

Group discussions facilitated the identification of the critical success factors, best-bet options, and key stakeholder roles and responsibilities related to the enhancement of the industry/sector's competitiveness by 2016.

In responding to the TOWS and PEST Analysis by Dr. Reis, participants suggested that it might be misleading to identify duties and taxes on the importation of fabric as being high. In fact, importers of fabric only face 15%VAT and a 10% duty on the importation of fabric.

The following encompasses the factors that participants identified were critical to the success of the sector.

2.3.4 Critical Success Factors

Training:

- Participants highlighted the fact, that the issues of skilled and committed labour remain problematic ones for the industry. A high labour turnover coupled with an overall shortage of skilled pose formidable challenges for enhancing the competitiveness of the industry.
- The problem of skilled labour is also related to one of quality output.
- Training in design and (garment construction) should be facilitated at each level of education, beginning at the elementary level.
- Participants highlighted the necessity of emphasizing **Cut, Make, and Trim (CMT)** techniques into fundamental training programs both at the elementary education level and for industry professionals.
- Crucial to boosting the competitiveness of the sector is enhancing the quality of those activities where most value is created. For the industry, it was suggested that the design element (intellectual property) contributed the most to value added. Hence, specific design-related training would be an invaluable strategy in strengthening industry competitiveness.
- It was also suggested that training in design should be structured in such a way as to facilitate the creation of a unique Caribbean product.

Branding:

- Participants noted that there has been low demand in the domestic market for local fashion designs.
- It was suggested that the Caribbean middle class represents an increasingly attractive target market for domestic designers. This group possesses the financial wherewithal to demand designer clothing.
- Strengthening the domestic brand of local designers could facilitate consumers in occupying this target market switching their taste (and demand) for European/North American designer brands to local designer brands.

More stringent certification and quality controls:

- Critical to the competitiveness of the sector is the need for more stringent certification tests on imported fabric (other than the labelling standard), as well as an industry quality certification to be set on finished products of designers. These would boost the overall quality of output.

Standardization of sizes to the domestic and regional market:

- Participants suggested that it might be necessary to formulate sizes that are reflective of the Caribbean woman's ***body proportions.*** This would result in a product that is more suitable to the target market.

Marketing:

- Critical to the competitiveness of the industry, is the ability of designers/producers to reach both the domestic and external markets.

Regional Trade Policy:

- Participants identified the benefits of having duty free market access to regional markets, especially under the CSME framework. This would facilitate increased regional market share for the industry.

Industry Networking:

- Participants highlighted the importance of establishing a formalised communication link between designers and producers in the industry.

2.3.5 'Best Bet' options

The following encompasses the '**Best-Bet'** options for transforming the sector:

Establishing an arts academy:

The proposed arts academy would be designed to meet the human resource development needs of the industry, incorporating not only training in design, but in CMT.

Establishing a designer's co-operative:

- Participants suggested the establishment of a designers' co-operative which would serve as the domestic manufacturing area for local designers and producers. Considering that there exists a market capacity for a production capability, as well as greater numbers of trained designers emerging from the proposed arts academy, the co-operative would house the necessary technologies to facilitate the designer in developing his/her individual lines.
- It was proposed that the co-operative be an independent entity, but one that operates simply to facilitate the production of individual designer lines. Participants, however, identified the challenge this would pose since designer firms are highly variable within the industry (according to size, specialisation, and so on). Consequently, production solutions are quite different between and among designing companies.

2.3.6 Marketing Strategy for a Co-operative

Target market:

- Participants proposed that the co-operative focus its operations on the retail market, with agents facilitating product placement in the retail market. It was also suggested that links be established with the diasporic retail market.
- The co-operative would focus production on cruise wear and not haute couture.

- Participants highlighted the difficulty in devising a single uniform marketing strategy owing to the high level of product and market differentiation that exists in the industry.
- The following highlights the key stakeholder roles and responsibilities, which, when fulfilled, could assist in the transformation of the industry/sector.

2.3.7 Government standards and skills development

Bureau of Standards:

- The need for more clearly defined and stringent certification and quality controls were identified as critical success factors.
- The Bureau of Standards is primarily responsible for developing these standards and controls.

Ministry of Education:

Primarily responsible for providing the training related facilities needed to satisfy the human resource development needs of the industry.

Ministry of Trade:

Responsible for trade negotiations and attempting to facilitate duty-free access to regional markets.

2.4 Pan Production

This workshop was held on July 13th, 2006, at the Chaconia Inn Hotel in Port of Spain, Trinidad. The presenters were Ms. Joycelyn Lee Young, Dr. Keith Nurse, and Mr. Chanzo Greenidge

2.4.1 The Value Chain and Key Stakeholders

Owing to the integrative nature of the pan production process, Chanzo Greenidge formulated a value chain of the differing elements in the pan production process. The elements in the value chain analysis were identified as being:

- Knowledge brokering.
- Production.
- Circulation.
- Delivery.
- Reception and feedback – getting a response from the customer.
- Overall co-ordination – creation of economies-of-scale, scope, speed via cooperation.

Chanzo Greenidge also identified eight (8) primary stakeholders who should be involved in the coordination of the pan production process:

- Steelpan entrepreneurs: builders, tuners, distributors.
- Consultants/legal experts.
- Media/Entertainment Industry – placing the name of T&T steelpan in the consciousness of foreign industries.
- Private Sector and Industrial Development Agencies.
- Coordinating Bodies – e.g. Pan Trinbago.

- National Educational, Research and Training Agencies and Institutions e.g. UTT; UWI; NIHERST; COSTATT.
- Government.
- Donors and international organisations – the success of the Steelpan industry may attract non-traditional donors e.g. the ILO and World Bank because of its employment generation capability.

2.4.2 PESTE Analysis

- Workshop participants were particularly concerned with the environmental impacts of pan production. Some of these concerns included:
  - Noise pollution – It was highlighted that very few tuners were able to create a sound-proof space.
  - Chroming – The impact of dealing (both from production and in disposal) with toxic waste from the chroming process of tuners.
- Participants noted the difficulty involved in sourcing a reasonably priced, 'safe' drum. It was suggested that domestic producers source comparatively less hazardous steel sheets from Venezuela for the production of the pans. Alternatively, National Petroleum could source these sheets directly for the production of drums.
- It was highlighted that most pans were made from discarded drums, which, though unsafe, allowed the cost of production to remain at a reasonable level. The importation of less toxic sheets to make drums would result in increased costs of production, and, consequently higher priced instruments.
- In light of the possibility of more costly pans, it was suggested that, like other instruments, there should be a range with regards to the quality of pans on the market. Therefore, for those willing to pay more for a pan, more expensive materials should be used in the production process. For those willing to pay less, cheaper raw materials would be used in the production process.

2.4.3 TOWS Analysis:

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
• Brand Trinidad and Tobago.	• Lack of domestic rivalry and collaboration - inhibits development of the product.	• Local vs. Global demand – Foreign preferences for quality assurance, customized instruments (might favour small domestic producers); youth/ • Educational demand segment.	• Local vs. Global demand – Brain drain (emigration of skilled producers. It may be necessary to create networks for them to continue to share their expertise in the domestic industry). • Factor Creation Mechanism (i.e. How do we replace tuners who migrate?).
• Size and skill – small size favours small batches of high quality instruments.	• Local Business Culture Lack of managerial and entrepreneurial skills by producers; Limited ICT adoption in facilitating the pan production process.	• Lucrative European, North American and Asian markets promise the emergence of a 'pan-aware' young adult market segment by 2016.	• Technological Change – Quality of imported raw material • Improvement of production and tuning methods.
• Indigenous technology.		• Emerging markets in the Global South: West/North Africa & Middle East; Eastern Europe, East and Southern Asia, Central America, Brazil and South Africa.	• Local Business Culture – Capital Scarcity.
			• Health and Safety – Exposure to toxins; Tinnitus/Hearing loss.

2.4.4 Critical Success Factors

Chanzo Greenidge identified the following critical success factors to the industry:

- Training: R&D; Investment (into industry-specific R&D); availability/quality of factor creation.
- Inputs: Improvement of research and development, fiscal incentives, and quality for inputs and related/supporting industries.
- Clustering- Horizontal and vertical linkages in terms of production and marketing.
- Branding: Product and quality improvement (including after-sale service), geographical indications and branding.
- Networks: Use of ICTs to leverage spatial proximity and trans-national links (including diasporic and historical linkages).
- Visibility: Recognition of excellence and historical value of steelpan.

2.4.5 Review of the Critical Success Factors in Group Discussions

Workshop participants reviewed the abovementioned critical success factors and provided the following feedback:

Training:

- It was agreed that training was crucial to enhancing the human resource development needs of the industry.
- It was advocated that training in pan production be integrated into the education system from the primary level to the tertiary/technical levels.
- With regards to training at the tertiary level, it was suggested that a Chair for Pan Technology be instituted at the University of Trinidad and Tobago (UTT). This may assist in legitimising the Pan Industry as a sector.

Institutional support that encourages innovation:

- Ownership of the intellectual property in pan designs and production techniques would allow domestic producers to earn higher value added.
- Trademarks and patenting were identified as being the most obvious recourses to safeguarding intellectual property. However, the high cost associated with patenting in particular was believed to make this option unfeasible unless producers would generate very high returns. The high cost of patenting was said to discourage innovation in the industry.
- Participants stressed the importance for additional institutional support that encourages producers to protect their innovations.

The need to attract entrepreneurs to the industry:

- It was highlighted that pan producers, though highly skilled in the area of pan production, may not have the managerial, legal, or marketing skills and resources needed to run the industry.
- Hence, specialists in such fields would have to be attracted to collaborate with the industry producers in an effort to advance pan production.

Reduction in duties and taxes on the exportation of pan:

- Participants called for a VAT exemption on the export of instruments.

Formulation of an industry plan:

- To ensure that the capacity of pan producers to increase their supply of pan in improved.
- Participants highlighted the fact that the supply of pans to the export market, in particular, was affected by a number of factors such as the high demand for steel drums in other sectors, the shift in production to cater to the music education needs of the domestic market.

Creation of incentives to encourage backwards integration

More stringent industry certification

2.4.6 <u>'Best-Bet' Options</u>

The following best-bet options were identified by the participants:

- Provision, by government, of a producer's card thereby enabling producers to enjoy discounted prices on inputs.
- Establishment of a Pan Manufacturers' Association and Tuners' Guild.
- It was highlighted that the success of the Association and Guild may be impeded by the general suspicion and unwillingness to collaborate among pan men.
- Hence, it was suggested that a neutral facilitator be involved in the process of brining different groups within the industry together to negotiate the establishment of the Association.
- It was highlighted that, prior to forming the Association and Guild, the relationship of the proposed bodies to Pan Trinbago be finalized, particularly with regards to financing.
- Lobbying for pan production space in the ETEK Industrial Park.

2.4.7 <u>Key State Enabling Agencies</u>

The following stakeholders were specifically identified by the workshop participants as being crucial to the enhancement of the industry by 2016:

Ministry of Labour:

- Cited as being responsible for the reduction of export duties.

Ministry of Legal Affairs:

- Primarily responsible for the formulation of an intellectual property strategy.

Ministry of Planning and Development:

- Responsible for undertaking a comprehensive market study, and facilitating a continuous process of strategy development policy mapping.
- Having undertaken the study, the Ministry will then be responsible for putting a financial cost to the various incentives, training and investment needed, since the Ministry is responsible for the formulation of the capital budget.

Bureau of Standards:

- Responsible for the formulation of quality standards for the industry, and defining the qualities of the product (instrument) that would allow it to be called a brand.

2.5 <u>Music Video Production and Online Music</u>

This workshop was held on July 14th 2006 at the Chaconia Inn Hotel in Port of Spain, Trinidad. The presenters were Ms. Joycelyn Lee Young, Dr. Keith Nurse, and Dr Jacqueline A. Morris.

The details of the participants who attended this workshop are shown in the following table.

Name	Organisation	Contact	
		Phone	Email
Camille Pierre	Elli Mac Production Ltd.	632- 3479	edcam@wow.net
Peter C. Lewis	Synergy T.V.	741-9700	peterc@synergytv.net
Lashann Prescott	Ministry of trade	777-8829	lashaunp@gmail.com
June Williams	Ministry of Planning & Development.	625-0367	june.williams@pd.gov.tt

2.5.1 Critical Success Factors for music video production

The following were identified as **critical success factors** of music video production:

More integrated industry planning process:

- It was suggested that the government include more industry professionals in the planning process. This would result in more relevant and effective policy-making.

Provision of incentives to promote video production:

- Participants highlighted the need for government and the private sector to change their orientation, thereby perceiving the industry as a lucrative business opportunity.
- It was suggested that local music videos be seen as a marketing/promotional tool for Trinidad and Tobago. Therefore, provision of incentives for producing videos may result in higher tourism and investment levels.

Formalized training:

- Would enhance the quality and quantity of domestically produced music videos.
- Developing support structures:
- The development of the industry is also dependent on the strength of the industry's support structure, which includes executive producers, and entertainment lawyers.

2.5.2 'Best Bet' Options for Music Video Production

The following were identified as 'Best Bet' options for the music video production:

Provision of a production grant:

- It was proposed that a production grant of a minimum US$10000 be given, per video.

Tax incentives for importation of equipment

Removal of VAT on imported equipment

Creation of a specific space for music video production

2.5.3 Critical Success Factors for Online Music

The critical success factors for online music revolve around developing a strategy for distribution, packaging, and marketing.

Distribution:

- It was suggested that the key to distribution in the local market is the use of an aggregator since we do not have an independent platform.

Packaging:

- With regards to packaging, what is needed is a one-stop-shop for the packaging of rights. This would allow for the easy packaging of content.
- COTT is limited since the body does not cover all categories of rights, for e.g. neighbouring rights.

Payment systems

- Another issue related to packaging is that of billing structures. Whereas the cell phone already has a billing structure, it was noted that one for web-based purchases is more problematic since the local market is more cash- than credit-oriented.
- It was mentioned that government facilitate the introduction of Pay Pal as a convenient payment structure, thereby affording individuals and small businesspersons the opportunity to conduct online sales.
- There needs to be a more robust local payment platform.

Marketing:

- The participants noted that it was necessary to create a central site focusing on Trinidad and Tobago's entertainment.
- This site can be a demand-creating mechanism for local (web-based) content.
- The government's role is one of funding and facilitating, providing incentives for the private sector to maintain such promotional sites.
- Online music should be marketed in conjunction with the Caribbean's key strategic advantage – Carnival (festivals).

2.5.4 'Best Bet' Options for Online Music

The following best-bet options were identified: -

Digital delivery

- It was suggested that the music industry focus on marketing local music through digital rather than conventional means (such as the physical production of CDs).
- Three (3) clearly defined steps were identified in marketing the local content digitally:
- Getting local content on the international digital jukebox
- Having our product properly categorized
- This is dependent on volume and consumption
- It was suggested that placing soca music in the World Music category initially may allow local content to "get its foot in the door"
- Creating demand for local content

SECTION B – Outcomes from NIHERST Facilitated Sector Workshops

1 Creative Sector Workshops – T&T

At the various creative sector workshops, participants developed views of the key issues that the sector faces if it is to develop successful business outcomes. However, 'Best Bet' opportunities for the sector that could become commercial propositions were not really developed sufficiently during these workshops. This took place at a special session with the key presenters.

2 Sector 'Best Bets' Development Session

A selection of possible sector 'Best Bets' that could be developed into commercial propositions were drafted in a special group session at NIHERST on the evening of July 18, 2006. Those who participated are shown in the following table.

Who	Representing
▪ Dr Keith Nurse	▪ University of West Indies
▪ Dr Jacqueline Morris	▪ Media 21
▪ Dr Michele Reis	▪ Researcher/Consultant
▪ Mr Chanzo Greenidge	▪ Bravo
▪ Ms Joycelyn Lee Young	▪ NIHERST
▪ Dr Nick Marsh	▪ NEXT
▪ Mr Ian Ivey	▪ NEXT

The session participants used a template to develop first draft 'Best Bet' options based upon the following criteria:

- The title for the 'Best Bet' proposition.
- A description of the offer.
- Consumer groups to which the offer is targeted.
- What capabilities does T&T have?
- What capabilities does T&T need?

It should be stressed once again that these are first draft 'Best Bets' concepts developed during this group session of creative specialists based upon the research work they had done and the outcomes of the various creative workshops.

The thrusts of these first draft 'Best Bet' options are summarised in the following tables.

1	**SECTOR**	**Creative (Keith Nurse)**
2	**'BEST BET' TITLE**	**1. Music Video Satellite Channel**
3	**'BEST BET' DESCRIPTION**	• A satellite channel that will broadcast local and Caribbean music videos. • Linked to Internet Radio station and Music downloads.
4	**GLOBAL MARKET NICHE FOCUS**	• World music is one of the fastest growth segments. • Link into the 'underground' (e.g. German soca sites) and more well-known world music portals and virtual global networks (www.yourtube.com; www.myspace.com).
5	**WHAT T&T HAS**	• T&T is the 4th largest music producer with the most diverse offer of world ethnic music mixes in the Caribbean. • It has a long history of musical innovation – calypso, soca, rapso, chutney, steel pan, and fusion styles. • A recording industry that is not fully tapped. • A large enough performance base.
6	**WHAT T& T NEEDS**	• Access to end consumers. • To by-pass the middleman (i.e. the major recording companies). • Access to a large share of local and Caribbean music catalogue. • A enhanced digital rights management system. • A payment system that works and rewards the performers and producers. • Network marketing and management skills. • High-speed broadband. • To get onto the menu of the global jukebox (e.g. iTunes). • Increased local content on the airwaves (radio, TV, cable).

1	**SECTOR**	**Creative (Keith Nurse, Chanzo Osei Greenidge)**
2	**'BEST BET' TITLE**	**2. Pan Booking Agency / Pan 'Aggregator'**
3	**'BEST BET' DESCRIPTION**	• Establish a booking agency to export the services of PAN ensembles to cruise ships and other potential clients. • Also look at global booking opportunities for PAN ensembles. • Can include the whole PAN story – from making to performing. • A facility that provides an interface for people to access PAN performers / products/ services that 'aggregates' the individuals through a networked linkage without taking away their desire to retain their individuality.
4	**GLOBAL MARKET NICHE FOCUS**	• Live performances. • Tours. • World Music concerts. • Airlines and hotels, travel agencies, cruise lines. • Event managers (local, regional, global) – e.g Mardis Gras, sporting events. • Global city carnival organisers. • Arts festival promoters. • Big music event organisers (e.g. Big Day Out).
5	**WHAT T&T HAS**	• Hundreds of steel bands and thousands of pannists. • An expanding reserve pool of talent in the secondary school system. • A Pan manufacturing capability. • A diasporic community that loves pan. • An expanding non-Caribbean audience and pan players.
6	**WHAT T& T NEEDS**	• An aggregator/portal/facilitator/marketing agency. • An e-commerce management package. • An entrepreneur / group effort / joint venture.

1	**SECTOR**	**Creative (Keith Nurse, Jacqueline Morris)**
2	**'BEST BET' TITLE**	**3. Carnival Parade Event Management Portal / 'Carnival in a box'**
3	**'BEST BET' DESCRIPTION**	• A one-stop shop carnival theme and delivery package – music, costumes, themes, event management services. • A pre-packaged carnival offer in containers that can be custom built and delivered to any city / site in the world.
4	**GLOBAL MARKET NICHE FOCUS**	• Carnival cities around the world. • Global city event managers. • Cultural and ethnic festival organisers. • Arts festival organisers. • Mardi Gras organisers.
5	**WHAT T&T HAS**	• It has all the components – but they are scattered and not available in an integrated packageable way. • It has the most globalised carnival (over 70 Diasporic Caribbean Carnivals). • Diasporic Caribbean Carnivals are the largest festivals in their respective locations (e.g. visitor arrivals, visitor expenditures and audience expenditures). • It has the best kinetic costumes – most danceable. • It has designers and Mas makers that export their design and fabrication services. • It has the best dance music for carnivals. • It has the steelpan. • It already has individuals and small groups involved in festivals in other countries – either as bit part players or assisting with.organising – but often just 'giving it away'.
6	**WHAT T& T NEEDS**	• 'A kick in the butt'. • An entrepreneur who pulls it all together. • A network developer and manager who connects with potential end users. • A collective 'portal' that brings together the offers in a customisable fashion but also preserves the individual artist creativity and independence spaces. • Recognition that this is also a globally marketable package and not just a hometown or diasporic event/phenomenon.

1	**SECTOR**	**Creative (Michele Reis)**
2	**'BEST BET' TITLE**	**4. 'Sea Island' Cotton Clothing Lines**
3	**'BEST BET' DESCRIPTION**	• Establishing a line of Sea Island cotton clothing or developing a niche market within the existing Caribbean fashion market. Sea Island Cotton is indigenous to the Caribbean region, available primarily in Antigua, Jamaica and St. ThoMas. This would result in the production of a quality 'sea island' cotton clothing industry (niche market).
4	**GLOBAL MARKET NICHE FOCUS**	• The raw cotton is already sold in Japan, Germany and Italy and sells on the international market at $30US a yard. • European market and Japan for the clothing.
5	**WHAT T&T HAS**	• Local talent. • Creativity. • Design talent. • Artisans bringing it to fruition. • Successful T&T fashion brands e.g. Meiling, Heather Jones and Robert Young of The Cloth. Robert Young works only with environmentally friendly fabric. Robert Young would be the entrepreneurial champion in this initiative. He is currently trying to put together a group of fashion designers and funders - like the Caribbean Development Bank.
6	**WHAT T& T NEEDS**	• An approach to the Sea Island Cotton Association - Through industry networking and advocacy, the Sea Island Cotton Association in Jamaica should be approached to gain access to the cotton, which is only grown in the region. • Certification of authenticity. • Branding and marketing. • IP rights and protection.

1	**SECTOR**	**Creative (Michele Reis)**
2	**'BEST BET' TITLE**	**5. Fashion Cooperatives / Clusters**
3	**'BEST BET' DESCRIPTION**	• Establishing a cooperative pooling the resources of several small manufacturers and designers to do a line of clothing, soft furnishings for public institutions like hospitals, schools, government offices, locally owned hotels, etc. Instead of importing linens, draperies, tablecloths, etc for use in these establishments.
4	**GLOBAL MARKET NICHE FOCUS**	• A large cooperative could have 12 members comprising local designers who would create the design to produce a collective line of linens and bedspreads to be sold predominantly in hospitals throughout the Caribbean region.
5	**WHAT T&T HAS**	• Many designers with good creative ideas • Many small and medium-sized manufacturers dispersed throughout the length and breadth of the country.
6	**WHAT T& T NEEDS**	• Manufacturer and designer collaboration - a concept which is to be explored under the initiatives of Robert Young. • Market research to assess the viability of such an approach – can this niche be serviced in a competitive way? Young is of the belief that the cooperatives can fund themselves. • Are there more valuable global niches (such as high net worth consumer home ambience spenders in China, India and the wealthy markets) than the Caribbean institutional sector for 'artisan' type T&T products with a higher value focus?

1	**SECTOR**	**Creative (Jacqueline Morris)**
2	**'BEST BET' TITLE**	**6. The Caribbean Music Portal**
3	**'BEST BET' DESCRIPTION**	• A website portal that pulls together music from our region. • Both per item and subscription models. • Can customise your own play list of videos and music and also download. • Include background news, bios, etc. • Feature downloads and preview releases. • Details of concerts and venues.
4	**GLOBAL MARKET NICHE FOCUS**	• Young adventurous music fans. • The fast growing group of more mature 'world music' fans. • The Diaspora market.
5	**WHAT T&T HAS**	• The music, videos, and production talent. • The Internet development and management skills.
6	**WHAT T& T NEEDS**	• An IP regime that allows us to easily get rights for this. • Funding to do the videos and training to make good videos. • Network management and marketing skills. • E-commerce development and management skills. • Customer connectedness – search engine optimisation.

1	**SECTOR**	**Creative (Joycelyn Lee Young)**
2	**'BEST BET' TITLE**	**7. Fusion music for Asia**
3	**'BEST BET' DESCRIPTION**	• Chinese soca. • Chutney music. • For gym music, music video packages, Bollywood, Hong Kong movies, sports, and games (incl. video games), ring tones.
4	**GLOBAL MARKET NICHE FOCUS**	• The Chinese and Indian markets aimed especially at the middle and upper income groups in the 'hot' cities such as Bangalore (Karnakata State - Biotechnology), New Delhi (Bollywood-Fashion), Kolkata (Pan Performance / Online Music), Shanghai (Pan Production), Dalian, etc.
5	**WHAT T&T HAS**	• Recent development of capability and marketing in music mixes. • Growing popularity of soca (and related styles). • TT personalities have made a breakthrough in entertainment because of India and China (Chinese ballet). • We export to and import lots from India and China (so we have connections).
6	**WHAT T& T NEEDS**	• Contacts – hook up with innovative Asian artistes and distributors via intersecting diasporic linkages in North America. • Market research and development. • Network development and marketing strategy.

1	**SECTOR**	**Creative (Chanzo Osei Greenidge)**
2	**'BEST BET' TITLE**	**8. 'Steelband Times' Restaurant Chain**
3	**'BEST BET' DESCRIPTION**	• A Caribbean owned restaurant franchise supported by the production and marketing of an accompanying documentary / drama film. • Supporting market à la *Normandie Hotel*- featuring link to other niche sectors. • Also provides venues for Caribbean performances, arts, and acts - including pannists. • Community Capitalism- City / Community Twinning: Pairing of target cities with specific constituencies encourages buy-in from local producers. • Total Package Theme- Learn to Cook / Learn to Play, accompanied by musical cookbook.
4	**GLOBAL MARKET NICHE FOCUS**	• Key global and secondary cities in markets with a connection to the Caribbean cultural scene (e.g. Germany and Scotland). • Places where we are likely to attract high-end adventurous gourmet audiences – the total package theme.
5	**WHAT T&T HAS**	• Unique and innovative fusion cuisines. • A highly appealing historical movement (pan). • A very significant highly professional global Diaspora with some key areas of concentration. • Local Designers/Niche manufacturers capable of producing attractive and distinctive exterior/interior design.
6	**WHAT T& T NEEDS**	• A distribution network for the support artists and products. • S & PS clearance for the export of key T&T agricultural products / ingredients (including fisheries/horticulture). • A database of performers. • An entrepreneur to develop and make real the restaurant concept. • Market research and development. • Concept development and market testing. • Franchise and network management skills? • Investment to increase instrument production capacity via streamlining of sourcing; buffing; chroming.

1	**SECTOR**	**Creative (Jacqueline Morris)**
2	**'BEST BET' TITLE**	**9. Elements Music Studio**
3	**'BEST BET' DESCRIPTION**	• A full service studio and production studio for T&T with an 'earth, wind, fire' type theme.
4	**GLOBAL MARKET NICHE FOCUS**	• Offshore (and local) music and video producers who want to do their productions within the sphere and surroundings of the T&T / Caribbean.
5	**WHAT T&T HAS**	• Everything except the dollars and equipment.
6	**WHAT T& T NEEDS**	• Investment and equipment. • An entrepreneur to drive it (and maybe fund it). • Positive support from the authorities (no threats to its existence). • An attitude that we can do it without the government – self help rather than putting a hand out. • A collective drive to make it happen through building a real business case that could be sold to an investor / entrepreneur (local or offshore).

3 What Happens Next?

These Best Bets will be peer reviewed by both key Trinidad and Tobago stakeholders and other specialists both within T&T and offshore to determine which offer the greatest potential commercial prospects. In some instances there is a degree of overlap with 'Best Bet' propositions from other sectors. This overlap will be integrated into an overall 3-4 'Best Bets' selected for each of the five sectors being examined as part of this foresighting project.