Report 1: Contribution of the cultural and creative industries to the economy and society of Antigua and Barbuda

Report for the Department of Culture's UNESCO-IFCD-sponsored Cultural Industries Mapping Project

March 31st, 2023.

Prepared by Avril Joffe, independent cultural policy and economy expert
University of the Witwatersrand

Acknowledgements
This Department of Culture's UNESCO-IFCD sponsored project was conceived and coordinated by Dr Hazra Medica who has been a most knowledgeable and generous collaborator for this report. Dr Medica also conceptualised the surveys, the responses to which form the bulk of the information guiding the analysis in this report. Acknowledgement must also go to all the creatives/ cultural practitioners of Antigua and Barbuda, especially those that contributed to the knowledge base by completing the respective surveys. Acknowledgement must also go to my research assistant, Ms Sophie J. Hunter, for many of the graphs, charts and diagrams used in this report.

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Introduction and Context

Why the study

This report, *Report 1: Contribution of the cultural and creative industries to the economy and society of Antigua and Barbuda* forms part of the Cultural Industries Mapping Project for which the Department of Culture secured funds from UNESCO's IFCD in 2018. The purpose of the project, "Measuring the economic contribution of cultural industries to Antigua and Barbuda's national development" is

- Spotlighting the important contribution cultural/creative industries make to national development by improving collection and presentation of cultural statistics and data.
- Lobbying policy makers for increased, targeted, and evidence-based policy attention and financial and technical investment in the creative/cultural sector.
- Informing policy makers of creatives' and cultural practitioners' specific needs and the general needs of their sectors. Recommend ways to increase participation in the creative/cultural industries.
- Creating an online cultural information system that will improve promote and showcase your work and improve public information sharing and exchange.

The particular aim of Report 1 is to deliver a comprehensive analysis report delivering evidence-based information to clearly foreground the economic contribution and value of the CCIs to national development in Antigua and Barbuda including key economic and trade flows in Antigua and Barbuda's CCIs and CC; key economic and social indicators in relation to measuring impact on the economy; the overall contribution of the CCIs to Antigua and Barbuda's national development and the state of economy in Antigua and Barbuda.

Approach and Methodology

The study was based on three surveys: one with 430 creatives and cultural practitioner respondents; the National Festivals Office; the Antigua and Barbuda National Museum; the National Parks Authority; and a Promoter's Survey. Supplementary information was obtained from primary source documents as well as secondary material relating to socio-economic activity and political imperatives in Antigua and Barbuda, the CCIs in Antigua and Barbuda as well as those in CARICOM in general.

An independent consultant, Avril Joffe, a UNESCO Expert Facility member from South Africa, was contracted to analyse the results of these surveys and to compile these reports.

Figure 1 (Approach and Methodology) provides a schematic of the process followed to finalise *Report 1: The contribution of CCIs to the economy and society of Antigua and Barbuda* and *Report 2: Policy recommendations to strengthen the cultural and creative sector in Antigua and Barbuda*.

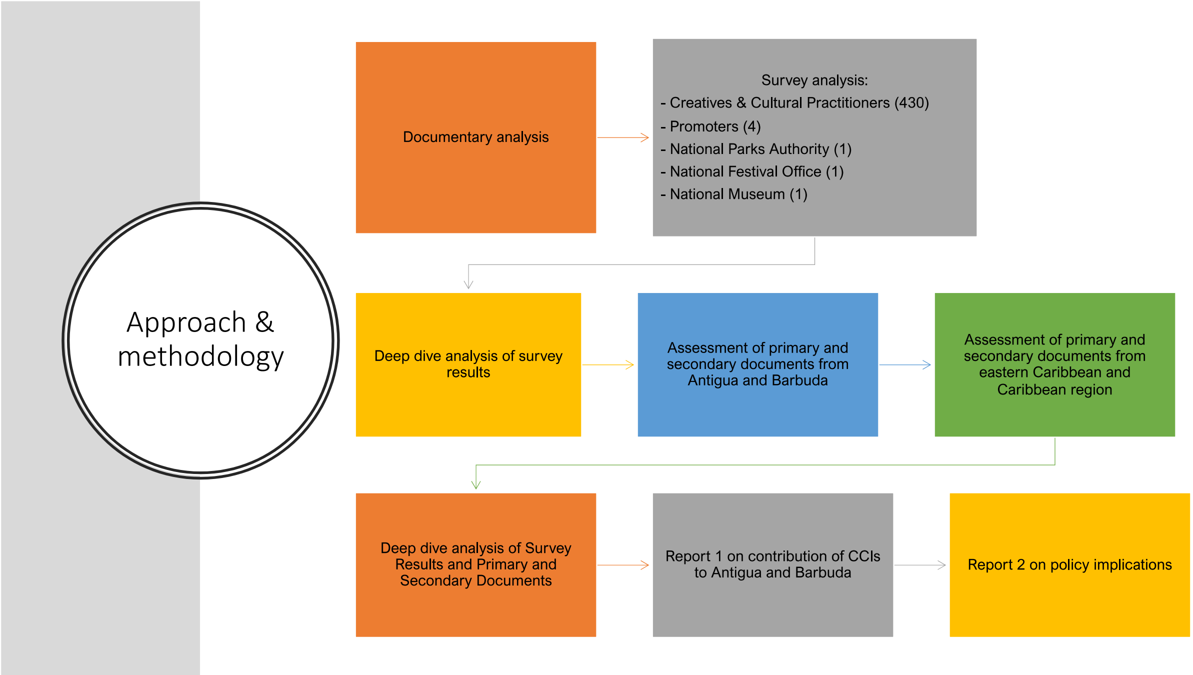


Figure 1: Approach and methodology

Limitations of the UNESCO IFCD Survey

The central aim of the Department of Culture's (DOC) Mapping Project, namely to clearly foreground the economic contribution and value of the CCIs to national development in Antigua and Barbuda including key economic and trade flows in Antigua and Barbuda's CCIs and CC is limited by the scope of the survey which did not seek to establish either current or longitudinal figures relating to income earnings, paid employment, turnover of cultural and creative businesses, value and size of exports and imports from the respondents. The survey does however give a comprehensive picture of the scope of activity, skills requirements for CCI activity, the challenges of doing business (both before and during Covid 19 Pandemic) as well as of expectations of support from government.

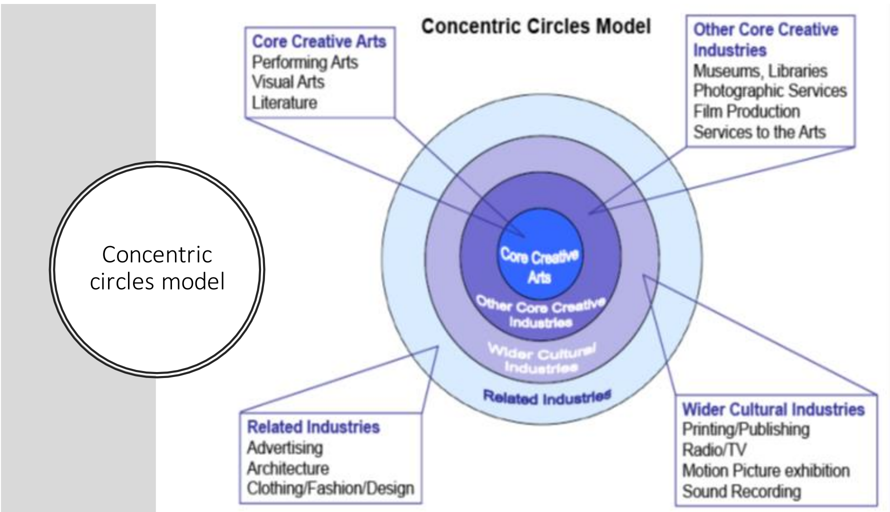
While the importance of the CCIs in Antigua and Barbuda have never been in question, there has not been the data to back this up until now. The Department of Culture's mapping project is a necessary first step to rectifying this lack of data. The project was conceptualised and managed by Dr Hazra Medica, Cultural Adviser in the Ministry of the Creative Industries and Innovation and project manager of Antigua and Barbuda's UNESCO IFCD – and ICH- sponsored projects. The 430 respondents who completed the mapping survey as well as all the related information collated for this project underscore the immense potential of the CCIs to the socio-economic development of these islands.

Nevertheless, it needs to be stated up front that there is still insufficient information to clearly articulate the contribution of the CCIs to the GDP – for that a more substantial mapping study will need to be undertaken initially based on firm level interviews with cultural organisations and creative businesses in all the cultural domains and across all stages of the value chain. Such a survey will need to collate financial information related to earnings, turnover, exports, and costs of doing business. More detailed proposals are included in *Report 2: Policy recommendations to strengthen the cultural and creative sector in Antigua and Barbuda*.

The cultural and creative industries: framing discussion

There is often confusion about the nomenclature of this sector, variously referred to as the cultural industries, the cultural and creative industries, the cultural economy, the creative economy, the creative ecosystem, or the cultural and creative sector. For simplicity we utilise the term the CCI in this report, although it may be prudent to provide some context as to what these terms reference and what impact they have on policy. It is first important to recognise that without artists and creatives there would be no cultural and creative industries. This is why government support to artists and creatives and their ability to create (freely and without any political interference) and produce is vital for the development of a robust set of CCIs.

We offer two different ways of understanding this. First, in 1998, David Throsby provided a model to show that the core creative arts (performing arts, visual arts, literature) are always at the heart of these industries. His illustration of a set of layers or rings, which he called Concentric Circles, shows how, as one moves further and further away from this core, there is less arts and culture embedded in the industries, such as is the case in advertising, architecture or commercial fashion (see Figure 2).



Throsby, 2007:5 defined in 19982001

Figure 2: The Concentric Circle Model of Throsby

The second example is that provided by a group of Asian researchers, Heng, Choo and Ho (2003) who showed the symbiotic relationship between the cultural industries and the creative industries and creative economy. This model in Figure 3 shows that while the upstream cultural industries (traditional art form: performing , literary & visual arts) may have commercial value in themselves; the downstream activities (applied arts: advertising, design, publishing and media-related activity) derive commercial value principally from their *application* in other activities. The public policy implications are clear: because there is a symbiotic relationship between all the sectors (commercial and non-commercial as well) a growth or decline in one area will have an equivalent effect on another area.

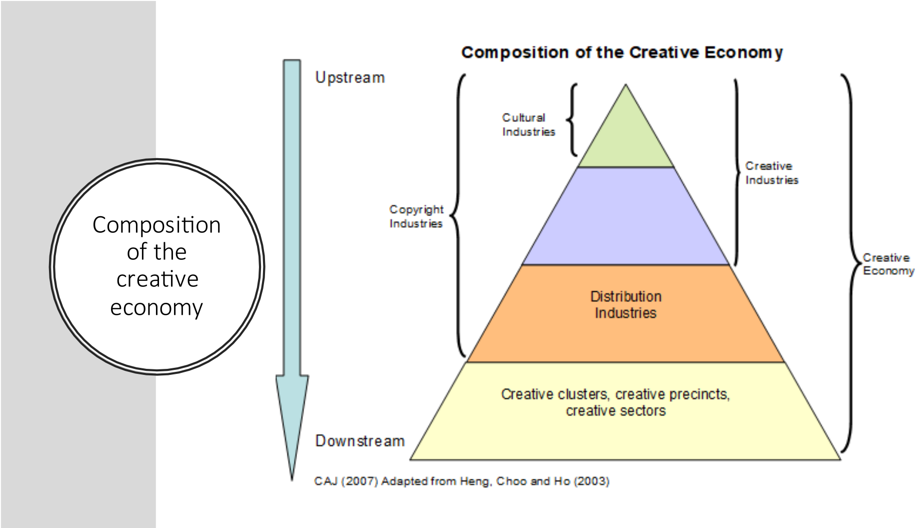


Figure 3: The Composition of the Creative Economy

Not only are these terms contextually specific, dependent on and often only relevant in the location in which they were developed, there is a clear timeline of their use and reference in public policies whether from their own governments or from several international agencies. UNESCO encourages the use of the definition provided by their Framework for Cultural Statistics developed by the Institute for Statistics as a starting:

> "Those industries that combine the creation, production and commercialization of products which are intangible and cultural in nature. These contents are typically protected by copyright and they can take the form of goods or services."

The term creative industries emerged in general discussions in the late 1990s as shown in Figure 4. It should be noted that creativity, as a key attribute, only became common currency in the late 1990s with the adoption of the *Creative Nation* in Australia and the UK's Department of Culture, Media and Sport (DCMS) definition of the creative industries:

> "Those industries which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property."

This subsequently found its way into UNCTAD reports on the creative industries and adoption in 2008 of the term The Creative Economy by UNCTAD in its global report (UNCTAD, 2008).

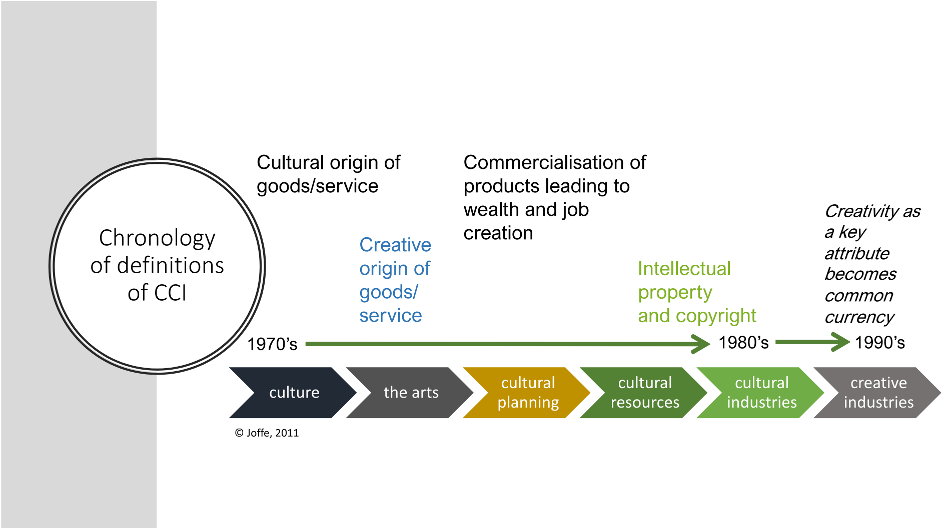


Figure 4: Chronology of Definitions in the CCIs

The DCMS model includes advertising, architecture, software and computer games which some governments were unwilling to include in their definition of the cultural industries and resisted the move to adopt the term creative industries. Others were quick to adopt what was seen as the most current definitions whether they were applicable or not to their reality.

In the absence of alternative more relevant definitions, the nature, status, and future policy developments of the cultural and creative sector has to a large part been absorbed into the language of economic rationalism or neoliberalism (RESET, 2022). There is now evidence to suggest that the adoption of the term creative industry has led, in some countries, to a crowding out of funding and support to what Throsby calls, the core creative arts. Figure 5 is offered as an illustration of the enlargement of the scope of application from cultural industries (UNESCO) to creative industries (DCMS) to the creative economy (UNCTAD).

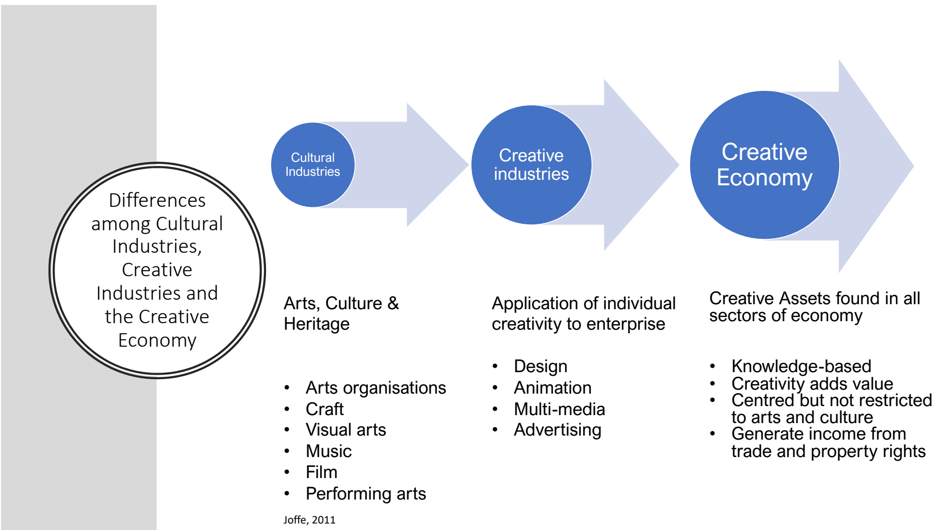


Figure 5: Differences between Cultural Industries, Creative Industries, and the Creative Economy

Figure 6 below shows some of the similarities and differences between four models.

Creative Industries models and associated sectors

1. DCMS Model	2. Symbolic Texts Model	3. Concentric Circles Model	4. WIPO Copyright Model
Advertising Architecture Art and Antiques market Crafts Design Fashion Film and Video Music Performing arts Publishing Software Television and radio Video and Computer games	Core Cultural Industries Advertising Film Internet Music Publishing Television and radio Video and computer games Peripheral cultural industries Creative arts Borderline cultural industries Consumer electronics Fashion Software Sport	Core Creative Arts Literature Music Performing arts Visual arts Other core cultural industries Film Museums and libraries Wider cultural industries Heritage services Publishing Sound recording Television and radio Video and computer games Related industries Advertising Architecture Design Fashion	Core copyright industries Advertising services Copyright collection management societies Motion picture and video Music Theatre and opera Press and literature Software and databases Television and radio Photography, Visual and graphic art Interdependent copyright industries Blank recording material Consumer electronics Musician instruments Paper Photocopiers, photographic equipment Manufacture, wholesale and retail of TV sets Radio CD recorders Computers and equipment Cinematographic instruments Partial Copyright Industries Architecture Clothing, footwear Design Fashion Household goods Toys

Joffe (2011:59)

Figure 6: Creative Industries model and associated sectors

Artists and creatives can find employment in the CCIs but more importantly, they find income opportunities in these. The more embryonic the sectors, the more likely it is that jobs and positions are project based, short term or part time, freelance and not subject to any forms of labour regulation or social protection. There are indeed multiple income streams possible in the CCIs as Figure 7 below illustrates.

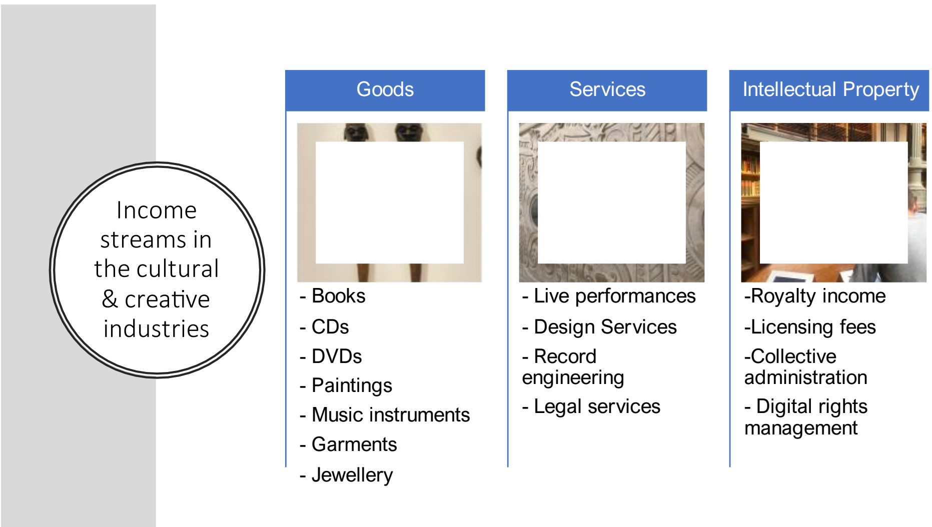


Figure 7: Income streams in the Cultural and Creative Industries: (Adapted from Dr Keith Nurse: The Cultural Industries in CARICOM: Trade, Investment & Development Challenges, 2009)

In 2009 UNESCO's Statistical body developed the framework for cultural statistics which provides what some feel is a more helpful frame to develop policy for these cultural domains (see Figure 8). They identified 6 core domains as providing the "conceptual foundations for evaluating the economic and social contributions of culture" (UNESCO, 2009:11), namely, Cultural and Natural Heritage, Performance and Celebration, Visual Arts and Crafts, Books and Press, Audiovisual and Interactive Media, and Design and Creative Services, as well as the related domains (tourism and sports) and the underpinning sectors that support these 6 core domains, namely intangible cultural heritage, education and training, archiving and preserving, and equipment and supporting materials.

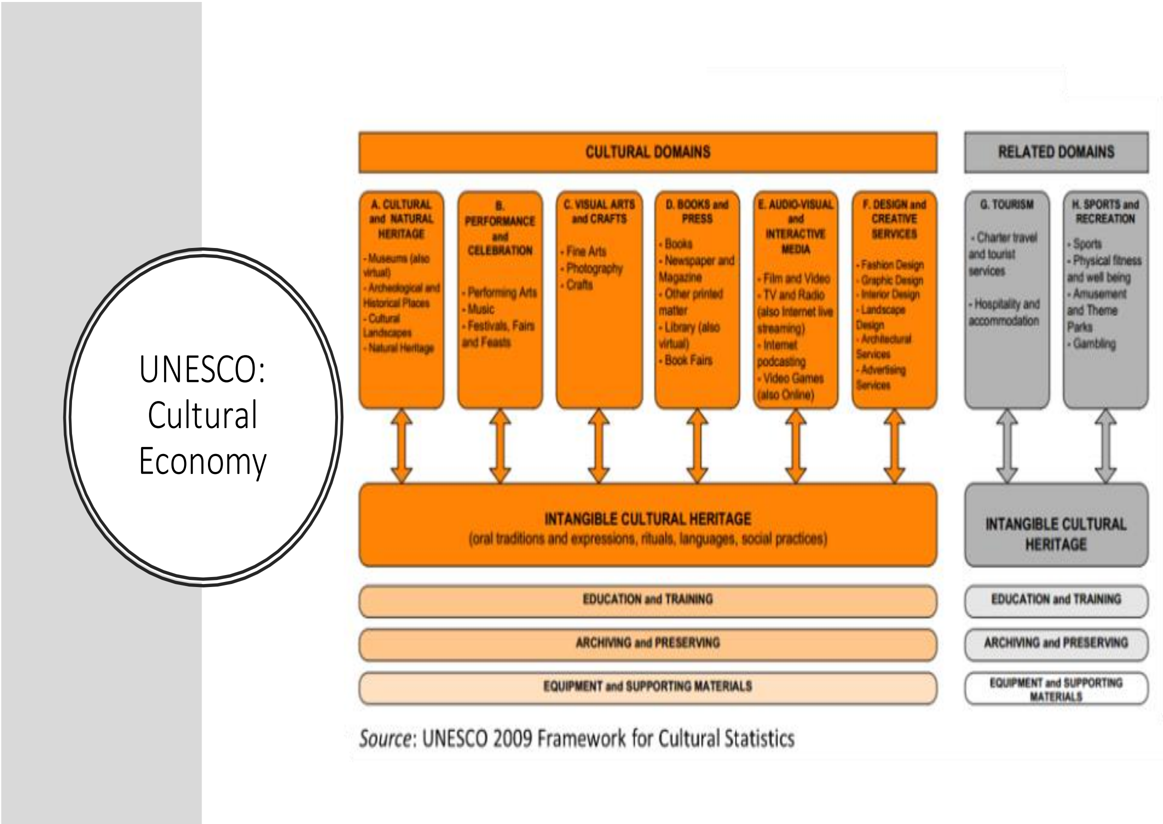


Figure 8: UNESCO's Cultural Domains of the Cultural Economy

In the interests of comparability this report uses this model to present the data from the surveys conducted by the Department of Culture of Antigua and Barbuda.

The policy environment of the CCIs in Antigua and Barbuda & sustainable development goals

In Antigua and Barbuda, there has been substantial movement towards the Sustainable Development Goals as well as a human rights approach to development as reflected in the 'Joint Submission of the United National Sub-Regional Team' (UN and OECS, 2021).

Both frameworks are critical foundations for a robust and growing set of cultural and creative industries in Antigua and Barbuda. As UNESCO has articulated in the 2005 *UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions* (2005 UNESCO Convention), a human rights framework is a guiding principle for the cultural and creative sector and the work to integrate culture into the SDGs has been ongoing since their adoption and established as a key principle in the 2005 UNESCO Convention.

Antigua and Barbuda are signatories to the UNESCO 2005 Convention; the Convention for the Safeguarding of the Intangible Cultural Heritage; the Convention on the Protection of the Underwater Cultural Heritage; the Convention on Wetlands of International Importance especially as Waterfowl Habitat; and the Convention concerning the Protection of the World Cultural and Natural Heritage.

The Ministry is in receipt of funding from the International Fund for the Diversity of Culture (IFCD), a project of the UNESCO 2005 Convention as well as from the UNESCO Convention on Intangible Cultural Heritage to advance the programmes and measures espoused by these two Conventions. The Voluntary National Review of Antigua and Barbuda (Government of Antigua and Barbuda, 2021) lists the Ministry's two UNESCO-sponsored projects as efforts that advance the SDGS. UNESCO has indicated that culture and the CCIs can augment and enhance several SDGS such as:

- SDG 3 (health and well-being that responds to cultural context).
- SDG 4 (quality education that also promotes a culture of peace and non-violence and of cultural diversity).
- SDG 5 (strengthening livelihoods for women in CCIs and supporting gender equality).
- SDG 8 (decent work and economic growth with carefully managed tourism investment).
- SDG 10 (preferential treatment in trade for locally produced cultural goods and services).
- SDG 11 (inclusive, safe, resilient, and sustainable cities and human settlements).
- SDG 13 (climate change and its impacts such as for traditional occupations and crafts that draw on local knowledge of indigenous communities).
- SDG 16 (Peace, justice and strong institutions that prevent conflicts and protects the rights of marginalised groups such as people with disabilities).
- SDG 17 (revitalizing the global partnership for sustainable development) (https://en.unesco.org/courier/april-june-2017/culture-heart-sdgs).

The Creative Caribbean project (EU-OACPS) has a key goal to shift the paradigm from the idea of a struggling artist to one in which an enabling environment exists in which artists, creatives, cultural workers, and professionals "are incentivized to produce and thrive and become a key driver of sustainable development in the region" as explained by the UNESCO cluster office for the Caribbean (CARICOM 2022b).

This focus on the sustainable development goals is important as well for Antigua and Barbuda. Related and relevant policy developments include the preparation of the New National Development Plan to integrate sustainable development goals more firmly (Government of Antigua Barbuda, 2021).

The Government of Antigua and Barbuda's 2021 Voluntary National Review aligns the national development goals to those of the SDGs in "implementing a transformative development agenda that puts the economy on a path that is more sustainable and resilient where "no one will be left behind" (2021: 1). It also firmly establishes the importance of stakeholder engagement – governments, businesses, civil society, academic, children and youth – in the development process both in its definition and as its beneficiaries.

Figure 9 below highlights how the four key sustainable development dimensions are supported by seven flagship priorities. Each of the four key sustainable development dimensions have relevance for the well-being of the cultural and creative sectors.

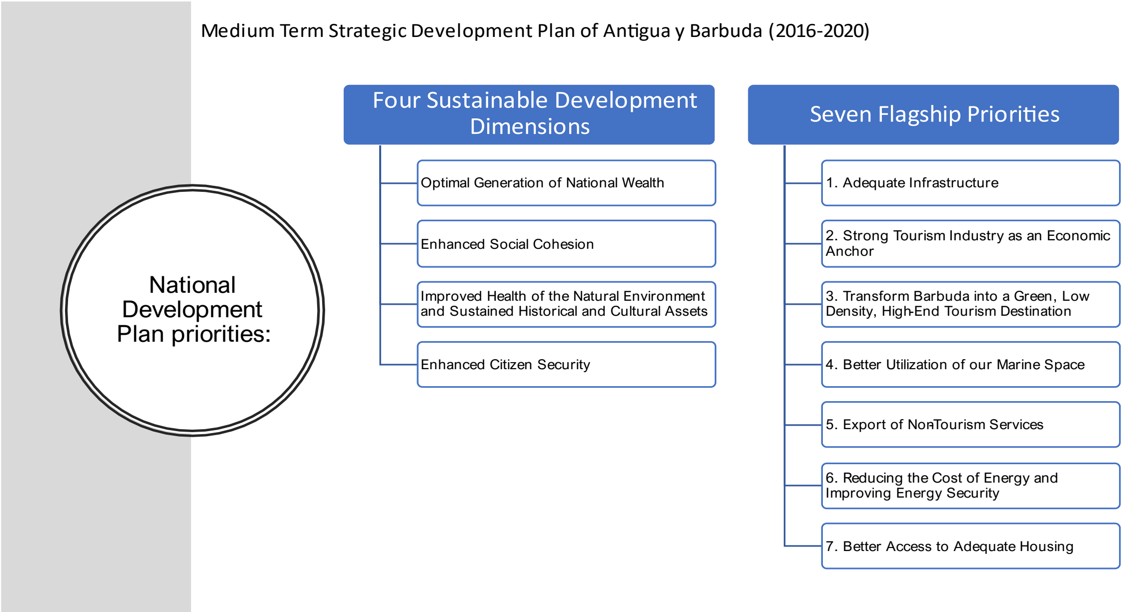


Figure 9: National Development Plan Priorities

Human Rights Approach

Antigua and Barbuda's has made progress to align their human rights framework more effectively with the international conventions already ratified (UN and OECS, 2021:4). The key progress made, according to the Joint Submission made on behalf of the United Nations Sub-regional Team for Barbados and the OECS, regards gender equality, gender-based violence, and the rights of persons with disabilities. While there is still much work to do (such as acceded to or ratify multiple international human rights treaties), Antigua and Barbuda have significantly ratified the International Covenant on Civil and Political Rights (ICCPR) as well as the International Covenant on Economic, Social and Cultural Rights (ICESCR) and the Regional Agreement on Access to Information, Public Participation and Justice in Environmental Matters in Latin America and the Caribbean (Escazú).

This human rights framework is particularly significant for a robust, strong cultural and creative sectors where gender equality and the participation of women, the disabled as well as other vulnerable groups in all fields of cultural expressions is of paramount importance. Some notable achievements in this regard are highlighted below.

Gender equality, women's empowerment, and rights of children

Women's empowerment is well established in Antigua and Barbuda with women well represented in the public sector and the judiciary. The country supports and continues to implement recommendations to improve women's access to justice and to promote women's participation in political, economic and social life" (UN and OECS, 2021: 6). However, women remain overrepresented in the lower echelons of public life. These developments are partly due to the strengthening of the Directorate of Gender Affairs whose investment from the state has increased from 1% - 6% over the past decade (UN and OECS, 2021:10).

Attention is also being paid to Gender based violence by enhancing resources and support to GBV survivors. This is supported by the Domestic Violence Act 2015. Significantly, Antigua and Barbuda strengthened its one-stop-centre (the Support and Referral Centre) for gender-based violence survivors. The centre provides coordination and oversight for all existing services on the island and is discreetly located with a police presence.

Rights of persons with disabilities and other vulnerable groups

Antigua and Barbuda boasts a strong Disabilities and Equal opportunity Act (2017) which addresses questions of education and training access, employment, healthcare, and general accessibility. It also provided for the establishment of the National Council of and for Persons with Disabilities, a register of persons with disabilities and a Disabilities and Equal Opportunities and Rights Tribunal (UN and OECS, 2021, p.13).

Other areas of crucial importance to reducing the precarity of cultural and creative workers and improving the ability of cultural and creative workers to sustain their livelihoods in the economy is their access to all forms of social protection, and their ability to access education and training. Key highlights are listed below.

Social protection – strengthening of the system
Cultural and creative work is precarious with many choosing to work independently in the sector as freelancers. It is therefore vital that sufficient social protection is available in the general system to support these freelancers when income earning possibilities are in short supply or completely dries up as it did during the Covid Pandemic. The Government of Antigua and Barbuda passed the National Social Protection Act in 2020 (replacing the Poor Relief Act of 1961). As the Joint Submission explains "it embraces an integrated, multi-sectoral and participator approach to social protection. The Act focuses on the prevention, reduction and elimination of economic, discriminator and social vulnerabilities related to poverty and marginalization" (UN and OECS, 2021: 7).

Right to Education and higher education
Many cultural and creative workers, practitioners and artists are self-taught while cultural and creative cultural value chains demand a combination of artistic knowledge and sensibility, multi-skills, digital literacy, project management knowledge, professionalism, and technical knowledge. The role of education and higher education in developing both an appreciation of arts and culture and in equipping cultural and creative workers for success in these cultural value chains has been well established. In Antigua and Barbuda, primary and secondary education is free and compulsory with adult literacy very high at 98.4%. Importantly, there is 'near gender parity' in attendance at both primary and secondary levels. Recommendations to strengthen the school system and adopt measures to encourage girl's participation in higher education were made by the Joint Submission (UN and OECS, 2021: 9)

The regional context: cultural and creative industries in the Caribbean

The recognition that the cultural and creative industries have vast potential to enhance economic diversification in vulnerable small development states, has led to culture being firmly placed on the regional development agenda (Antigua and Barbuda, 2021: 4). Hence, there is a now a Revised Draft Regional Development Strategy for the Cultural Industries in CARICOM (2020-2025) alongside the Cultural and Entertainment Services Strategy for CARIFORUM (Caribbean and the Dominican Republic)[1] and the establishment of the Caribbean Development Bank's Creative Industries Innovation Fund. Resources to action the recommendations within these strategies are still needed.

The 15 small open developing countries comprising the CARIFORUM group are diverse and unique in their levels of development, cultural identity, and economic status. It includes both the Anglophone Caribbean countries (Antigua and Barbuda, The Bahamas, Barbados, Belize, Dominica, Grenada, Guyana, Jamaica, St. Kitts and Nevis, Saint Lucia, St. Vincent and the Grenadines and Trinidad and Tobago) as well as the Spanish speaking Dominican Republic, French and Creole speaking Haiti, and Dutch speaking Suriname.

A number of different countries account for the bulk of the population, for land mass, and the GDP. While the total population of CARIFORUM was 27.5 million in 2012, only 4 countries (the Dominican Republic, Haiti, Jamaica and Trinidad and Tobago) accounted for approximately 90% of the population. Similarly, four countries (Dominican Republic, Guyana, Haiti, and Suriname) dominate the land mass of approximately 511,000 square kilometres, accounting for approximately 90% of the total land area. Equally, total GDP of CARIFORUM in 2012 was US$131.3 billion but 4 countries (The Bahamas, Dominican Republic, Jamaica and Trinidad and Tobago) account for approximately 80% of the income. Many CARICOM and CARIFORUM countries lack the necessary policies, institutions, or resources to effectively support the CCIs in their respective countries.

In an early study, Nurse (2009) reports that the Caribbean was seen to have both significant capability and untapped potential in the CCIs in the context of global growth; but that its competitiveness would only improve once there was harmonization and upgrades to its human resources, innovation pathways, industry institutions and governmental agencies. This need for harmonization and upgrades remains the core policy imperative for Antigua and Barbuda as a key member of the Eastern Caribbean Islands.

The Caribbean is well known for its range and diversity of cultural expressions, mostly manifested through festivals and carnivals. The regional mega Caribbean Festival of Arts (CARIFESTA) plays an important role in the ecosystem of the cultural and creative sector. The most known musical expressions include Reggae, Dancehall, Calypso, Soca, Punta, Bouyon, Kompa, Salsa and Denrey Segment as explained by Dr Armstrong Alexis, deputy secretary general of the Caribbean Community (CARICOM, 2022). The steelpan, the only acoustic

[1] There are fifteen (15) participating Member States of the Forum of the Caribbean Group of African, Caribbean and Pacific (ACP) States (CARIFORUM), namely –Antigua and Barbuda; The Bahamas; Barbados; Belize; Dominica; Dominican Republic; Grenada; Guyana; Haiti; Jamaica; St. Kitts and Nevis; Saint Lucia; St. Vincent and the Grenadines; Suriname; and Trinidad and Tobago.

musical instrument invented in the twentieth century, is both much in use and a major trading product for the Caribbean region.

The key agency supporting the growth and vibrancy of the cultural and creative industries in the Caribbean region is CARICOM, which adopted in its strategic plan the culture sector and cultural industries "as key drivers of economic growth and priority areas for job creation and growth" (Antigua and Barbuda, 2021:3).

A number of institutions, programmes, and agencies, starting with CARICOM, exist to ensure the support and growth of the cultural and creative industries; namely, the Caribbean Development Bank (CBD), the Creative Industries Innovation Fund (CIIF), Caribbean Export, the Caribbean Festival of Arts (CARIFESTA), the University of the West Indies and UNESCO.

A key agreement, CARIFORUM-EU Economic Partnership Agreement (EPA), is unique in including both trade in product and trade in services and, is a first regional agreement within the African, Caribbean and Pacific (ACP) countries signed with the EU. The free trade agreement was concluded in 2008 between 14 CARICOM countries and the Dominican Republic, known as CARIFORUM, and the European Union (EU). Previously, the EU unilaterally granted preference to the African, Caribbean and Pacific (ACP) countries through the trade provisions of the 2000 Cotonou Agreement.

However, in a recent study by Burri and Nurse (2019), it was found that this unprecedented agreement, which helps realise the objectives of Article 16 of the 2005 UNESCO Convention to include culture in a trade agreement and for its dedicated Protocol on Cultural Cooperation (PCC), has not delivered on its potentials. In particular, the CARIFORUM-EU EPA has not to date "substantially improved market entry and export earnings for CARIFORUM States … nor has it redressed the imbalance in the trade in cultural goods and services between the two parties." The study suggests that the expected increases in cultural exchange or increased diversity of cultural expression are not evident. Concerningly, the study found no evidence of dedicated funding or cultural cooperation programmes to ensure implementation of the EPA's cultural provisions.

The study noted that the CARIFORUM-EU EPA signatories could be supported in attaining the 2030 Agenda on Sustainable Development Goals (SDGs) - SDG 8 (target 8.A on Aid for Trade) and SDG 10 (target 10.a on special and differential treatment for developing countries and least developed countries in accordance with the WTO Agreements) - through the effective implementation of preferential treatment provisions foreseen under the 2005 Convention in the frame of the EPA. If this is to occur, several recommendations were highlighted to ensure the EPA's implementation: first, that the EU and its Member States, as well as the participating CARIFORUM States must take decisive steps to mobilize creative industry actors in order to increase transparency and simplify procedures, particularly in cross-border mobility; second, to increase awareness, to improve dialogue between relevant institutions, and to develop tailored financial programmes and measures targeting the CARIFORUM creative industries; third, long-term economic diversification, industrial upgrading, and sustainable cultural development, enhanced communication and exchanges among key strategic stakeholders at intergovernmental, governmental, industry and individual entrepreneur/artist levels, is necessary; fourth, that the creative economy's rapid technological transformation needs to be reflected in the Parties' instruments and strategies to contribute to a boost in digital entrepreneurship and market integration programmes.

More recently the Caribbean cultural and creative community have been provided a 3 million Euro opportunity with the roll out of the European Union funded project with the Organisation of African, Caribbean and Pacific States (OACPS) titled 'Creative Caribbean: An ecosystem of 'Play' for Growth and Development. This project provides grant funding for artists, professional arts associations, and cultural entrepreneurs in 14 CARICOM member states. It is hoped the fund will support the recovery of the cultural and creative sector in the region.

Trade flows in the Caribbean Islands

There has been significant attention paid to the nexus between cultural goods and services and international trade since 1980 (UNESCO 2000) as seen by the work of UN Comtrade and UN Cultural Statistics which collect and collate the data and the analyses presented in reports by UNCTAD (2008, 2010, 2022) and UNESCO (2015, 2018 and 2022).

As can be seen in Figure 10 there are substantial disparities between and within various trade blocs. Since the late 1990s, China has become a more dominant global player alongside Japan, the USA, Germany, and the UK. For UNESCO (2015, 2018 and 2022) the imbalance in trade flows, especially between developing countries and the dominant players has been a source of concern necessitating policy interventions to maintain cultural diversity and the diversity of cultural expressions at the local levels and increase their contribution to the growing trade in cultural goods and services.

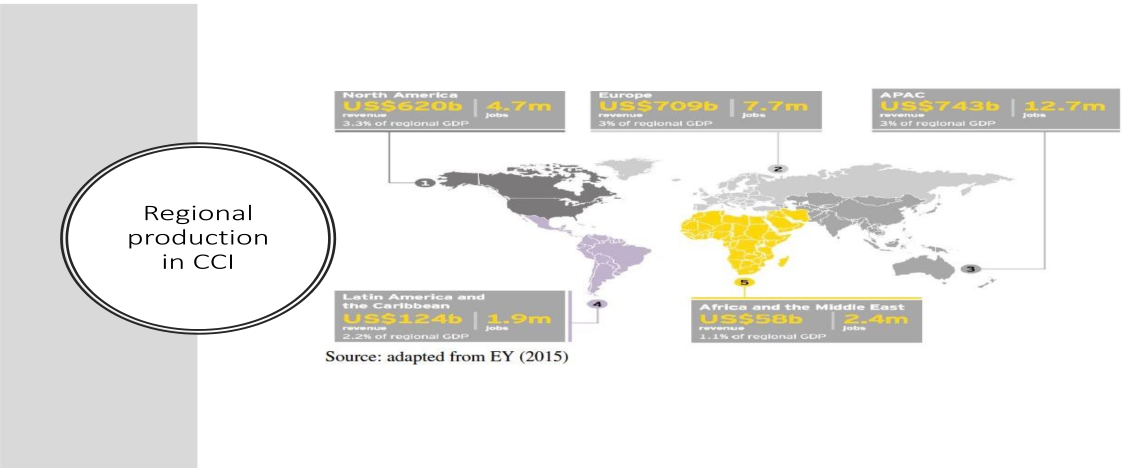


Figure 10: Regional production in CCIs (Lorde, Alleyne and Trotman, 2017:2)

With CCIs increasingly included and integrated into national development strategies, the continued trade imbalances suggest the need for policy interventions relating to investment, business support, and protection of intellectual property. Although the Caribbean islands showed a lag in monetizing its creativity, as the Munich Personal RePEc Archive (MPRA) report on Caribbean Exports (Lorde, Alleyne and Trotman, 2017) suggests, the establishment by the Caribbean Community (CARICOM) of a Caribbean Creative Industries Management Unit (CCIMU) in 2015 demonstrates a commitment to "address the needs of the region's cultural and creative industries, including business development, trade opportunities, and the protection of artists' and stakeholders' intellectual property rights" (Caribbean Development Bank, 2016).

The MPRA report shows that between 1991 and 2015 the Caribbean exported US$6,3bn worth of cultural goods, with the breakdown per cultural domain shown in Figure 10. It illustrates the dominance of visual arts and crafts ($5.95bn or 94,53% share of the total), which for this tourism dependent region is not entirely surprising. However, it points to the need for further policy interventions to attend to improve the performance of the other cultural domains, which each contributed less than 1% of total exports.

The dominance of visual arts and crafts is clearly evident in Figure 11 below.

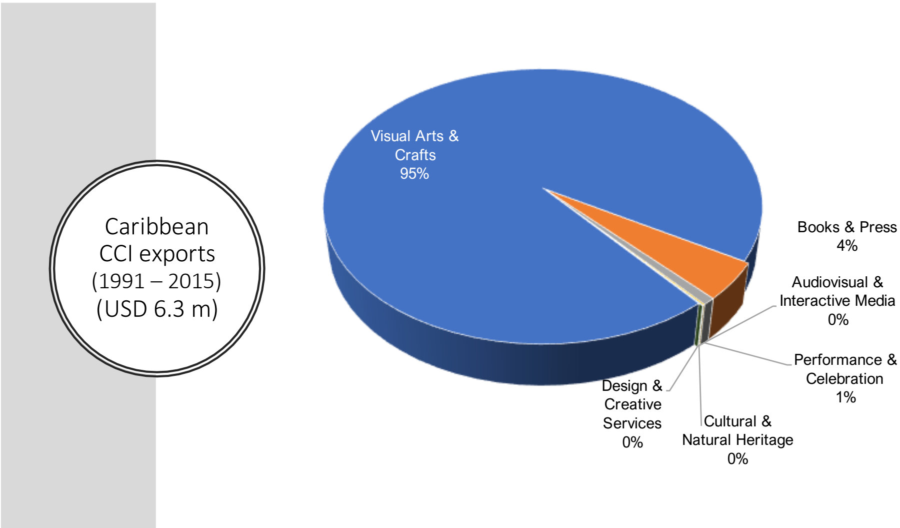


Figure 11: Cultural Goods Exports dominated by Visual Arts and Crafts (UN Comtrade)

Interestingly, only Brazil and South Africa export less cultural goods than the Caribbean. The MPRA report highlights that as a share of GDP, exports from the Caribbean exceeds that of Australia, Japan, Russia, and the USA as can be seen in Figure 12 below **Error! Reference source not found.**.

Cultural exports as a share of GDP

Comparison of Cultural Goods Exports in Select Countries 1991-2015

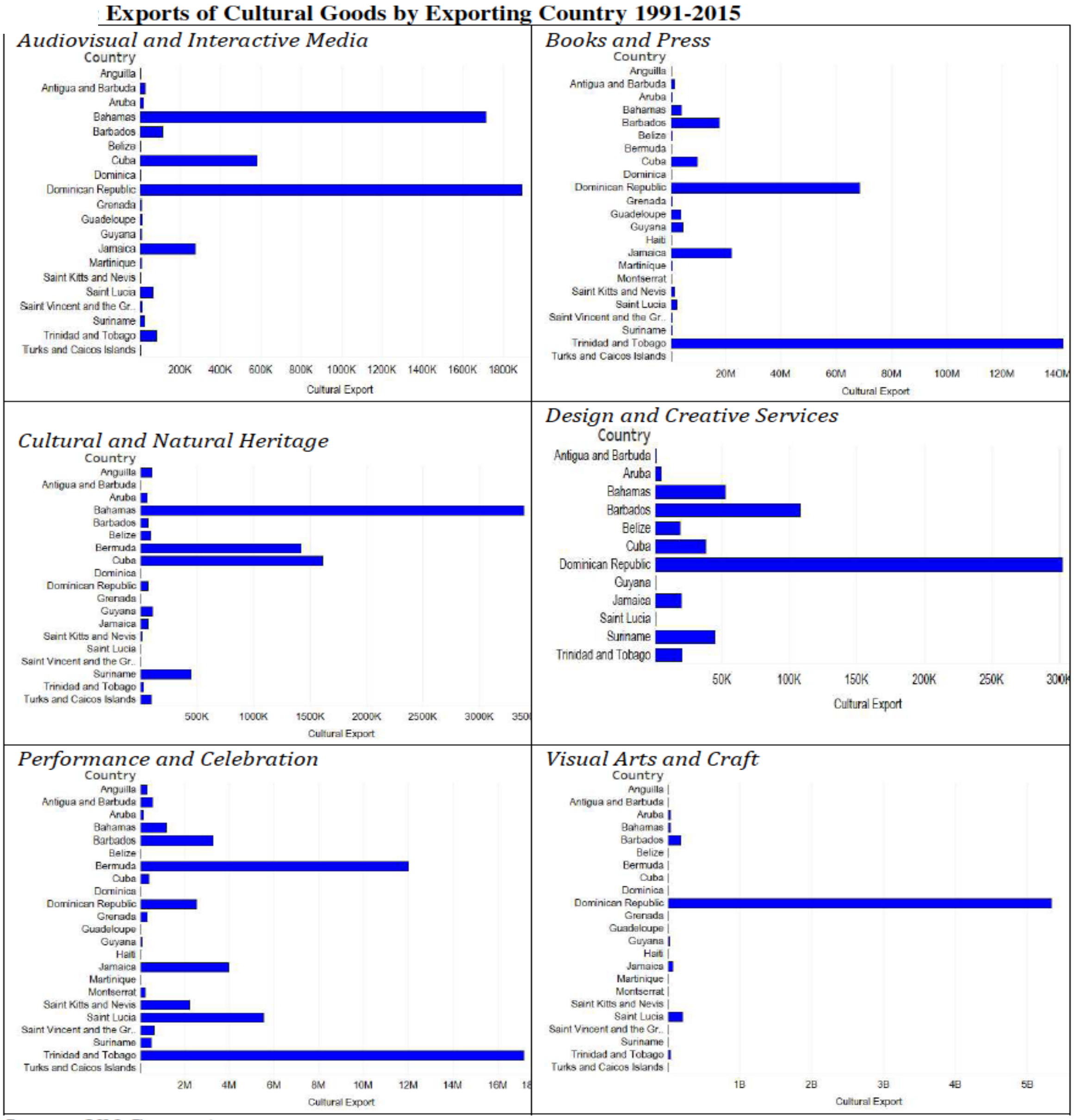
Country	Exports (USD $ bn.)	Exports per Capita (USD $)	Share of GDP (%)
Caribbean	6.30	13.31	0.14
Australia	10.37	19.81	0.06
Brazil	3.86	0.83	0.01
Canada	35.46	44.05	0.14
China	428.26	12.83	0.42
France	104.8	65.69	0.19
Germany	154.91	75.89	0.22
Hong Kong	178.14	1028.48	3.35
India	135.47	4.45	0.44
Japan	85.61	26.94	0.07
Netherlands	44.31	108.29	0.27
Russia	8.85	2.45	0.05
South Africa	3.05	2.43	0.05
South Korea	51.5	42.31	0.24
Spain	37.92	35.00	0.16
United Kingdom	257.56	167.72	0.47
USA	375.57	50.41	0.12

Source: UN Comtrade
Notes: Exports per capita is a 25-year average of per capita exports. Share of GDP is a 25-year average of the share of exports in GDP.

Figure 12: Exports as a Share of GDP (repurposed from Lorde, Alleyne and Trotman, 2017:14).

It is useful to distinguish where exports originate within the Caribbean. From Figure 13**Error! Reference source not found.** it can be seen that Antigua and Barbuda trails far behind the 'big 4' of the Caribbean (Trinidad and Tobago, Guyana, Jamaica, and Barbados). Cuba and the Bahamas could be added to these 4 as the main exporters. The Dominican Republic shows significant export of 3 cultural domains, namely Audiovisual and Interactive Media, Design and Creative Services, and Visual Arts and Craft goods, while Trinidad and Tobago showed good results in the cultural domains of Books and Press and Performance and Celebration with the Bahamas being the largest exporter in the cultural domain of Cultural and Natural Heritage.

Antigua and Barbuda has no exports in Cultural and Natural Heritage, Design and Creative Services or Visual arts and crafts, with minimal exports in Audiovisual and interactive media, Books and Press, and a slightly better result in Performance and Celebration.



Source: UN Comtrade

Figure 13: Exports of Cultural Goods by exporting country 1991-2015 (Lorde, Alleyne and Trotman, 2017:15)

Lorde, Alleyne and Trotman's research shows that there is room for growth and expansion of cultural trade, in particular to countries that speak the same language. However, they argue that "[overall] the Caribbean's exports of cultural goods underperformed by 50,5%" (2017:22). With Visual Arts and Crafts dominating exports (95%), it is clear that diversification is necessary which would also "generate more opportunities for income generation and employment creation" (2017: 22). They explain the implications of export diversification:

> "It lowers the risk of having all of one's 'eggs in one basket' and thus stabilised foreign exchange earnings from cultural goods exports. This will require market research, possibly with the help of export promotion agencies across the region to identify additional opportunities." (2017: 22)

Currently there is some trade activity within the Caribbean area such as the import of musical instruments, parts and accessories from Antigua and Barbuda by Barbados ($1.21 thousand) in 2011 (UN Comtrade) (Trading Economics, 2011) with it increasing to US$296 during 2015.

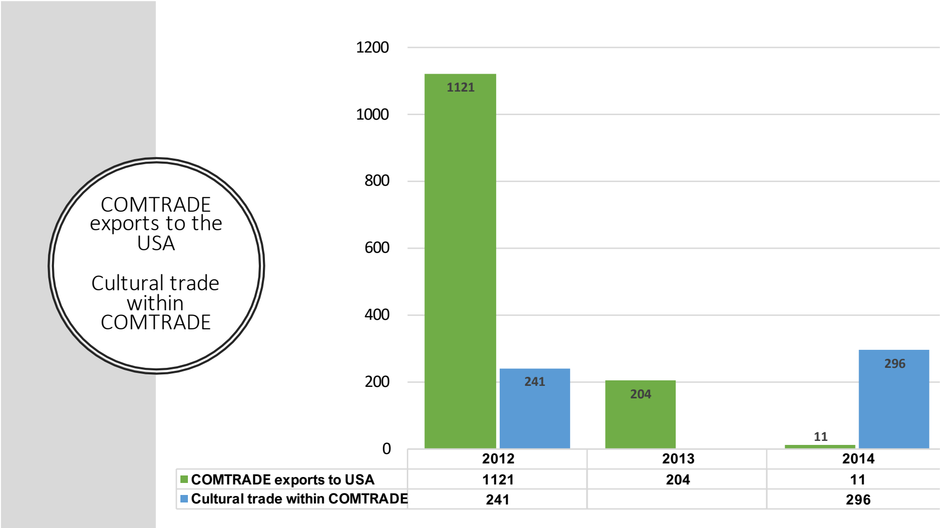


Figure 14: Cultural trade with USA and within the region (COMTRADE)

Exports of cinematographic film, exposed and developed from Antigua and Barbuda to United States was US$11 during 2014, according to the United Nations COMTRADE database on international trade (Trading Economics, 2014).

Socio-economic status of Antigua and Barbuda

Antigua and Barbuda is part of the Eastern Caribbean Currency Union and the second largest economy after Saint Lucia. Its population is close to 100 000 with an unemployment rate of less than 9%. In 2016, 18% of people in Antigua and Barbuda lived in poverty and 5% were indigent (UNICEF, 2021). Poverty has not been eradicated with the country having one of the highest Gini coefficients in the Caribbean (0.48). The poorest 20% of the population enjoy only 4.5% of expenditures while the equivalent figure for the richest 20% of the population is 56.3% (OCHA, 2021).

Schooling is free for all children between 5 and 16 years only with universal secondary education introduced since 2013 with 99% of all citizens older than 15 years having completed five years of formal education and are functionally literate. For the multiskilled environment of the cultural and creative sectors this bodes well for future growth of the CCIs. Antigua and Barbuda also boasts the Five Islands campus of the University of the West Indies (UWI), which will increase the post-secondary education participation of students of the OECS region (which is below that of Jamaica, Barbados or Trinidad and Tobago (Government of Antigua and Barbuda, 2021: 12).

The growth rate was increasing over the last decade with stable and low inflation and a reduction in public debt, with performances by the tourism and construction sectors significant in the aftermath of Hurricane Irma in 2017 and the recovery efforts. There were significant interruptions caused by the Covid-19 pandemic in this tourism-dependent country such as the debt to GDP ratio increasing to 89% in 2020 compared to 67% in 2019 (Government of Antigua and Barbuda, 2021: 9).

The heavy dependence on the services sector as well as on international tourism has both opportunities and challenges for the cultural and creative sectors.

The country's strategic imperatives over the period 2016-2020 focused on three key considerations: optimising the benefits from higher education and training, expanding economic infrastructure, and attaining higher levels of competitiveness. The latter required attention to market efficiency, technological readiness, and market access (Government of Antigua Barbuda, 2021:8).

The United Nations classifies Antigua and Barbuda as a high-income country with a HDI value of 0,778 ranking 78 out of 189 countries and territories. This HDI ranking is the highest in the Caribbean region and one of the highest amongst Latin American countries and evidence of the government's commitment to economic and social transformation, in particular the focus on putting people first and planning for and embracing quality of opportunity of those furthest behind.

Nevertheless, challenges that will also impact the growth and development of a robust arts and culture sector and a strong cultural and creative economy, remain. These include the impact of climate change such as Hurricane Irma in 2017 as well as excess rainfall events; health challenges such as the increasing incidence of non-communicable diseases; a 'hostile global architecture' (finance and trading) including limited access to concessionary finance for development, black listing and a long drawn out trade dispute with the USA; high levels of indebtedness; vulnerability to natural hazards (Government of Antigua Barbuda, 2021: 7), and the dependence of the economy on tourism.

In the Figure 15: Antigua and Barbuda in figures are selected figures for the purpose of this report from the Government of Antigua and Barbuda (2021: 15-17) and Statistics Division, Ministry of Finance and Corporate Government (2022) and the CBI report (2019).

Selected Figures Antigua and Barbuda	
Nominal GDP (EC million)	4487
Real GDP growth rate (%)	3,4 (2019)
GDP per Capita	US$16,684.40 (2018)
Inflation rate (%)	1.0 (2020)
Tourism Contribution to GDP	47%
Labour Force Composition	51,931 (2018) Male – 47,2% Female – 52,8%
National Unemployment Rate (%)	8,7 (2018) Men – 9,9% Women – 7,3%
Youth Unemployment (15-24)	25%
Total Population	100,772
Human Development Index	0,778 (2019)

Selected Figures Antigua and Barbuda	
Poverty Rate - Adults - Children	18,4 (2005/6) -15,6 -24,3
Government spending on education	10%
Functional literacy rate	99%
Enrolment rate in Secondary Education	88,8%
Females in Managerial Positions	45,1%
Population percentage living on Coastline	60%

Figure 15: Antigua and Barbuda in figures

National Cultural Policy in Antigua and Barbuda

Work has been proceeding on developing a National Cultural Policy (NCP), first developed in 2017. The NCP requires further review and wider consultation. It is envisaged that this Department of Culture's Mapping Report will contribute to bringing this process to finalisation.

The draft NCP establishes the place of Antigua and Barbuda in the Caribbean Community, and the importance of culture as follows:

> "Modern day Antigua and Barbuda is a member of the Caribbean Community (CARICOM) and the Organization of Eastern Caribbean States (OECS) and participates in the regional integration processes of the CARICOM Single Market and Economy (CSME) and the OECS Economic Union. It is a signatory to the CARIFORUM-EU Economic Partnership Agreement (EPA). Tourism accounts for about 60% of GDP and 40% of investment (CIA Factbook). The country is well known as a financial services Centre, an air transportation hub and a regional focal point for sailing, yachting and marine services. Festivals and celebrations, including the annual Carnival, National Independence, Sailing Week and several food festivals. These events provide national platforms for showcasing the best of culture: music, dance, pageantry, cuisine and arts and crafts." (2017:7-8)

The Government of Antigua and Barbuda established a Festival Committee to brand the island as the 'festival capital' of the Caribbean since it supports 'an extensive festivals calendar' (OECS, 2012: 13). There is a Festivals Commission, the ABFC, which oversees the festival office.

The Government has set up regulations that will support the growth of the CCIs. These include:

- A tax incentive region allowing up to $EC 250 000 to promote private investment in the sector. This tax incentive was tabled in 2005.
- An extensive legislative framework that supports the protection of intellectual property rights. Enforcement of intellectual property rights protection is inconsistent (CBI Report, 2019:35).
- The adoption of various laws regarding rights of workers and the ratification of eight of ILO's core labour conventions (CBI Report, 2019:35).

The core support to the sector from government is focused on cultural production (supply side) with little emphasis on consumption (the demand side). In this way key support is provided to artists, creators, and producers. However, the demand side requires that attention is also focused on the creation of the demand for cultural activities, goods, and services from distributors of culture to exhibition, and cultural consumers (arts audiences, attenders).

Importantly, the government has a Department of Culture with a dedicated budget. However, this budget is only 2% of the total (according to the 2021 Antigua and Barbuda Budget

Estimates and Business Plans for Ministries) as illustrated in Figure 16 **Error! Reference source not found.**below.

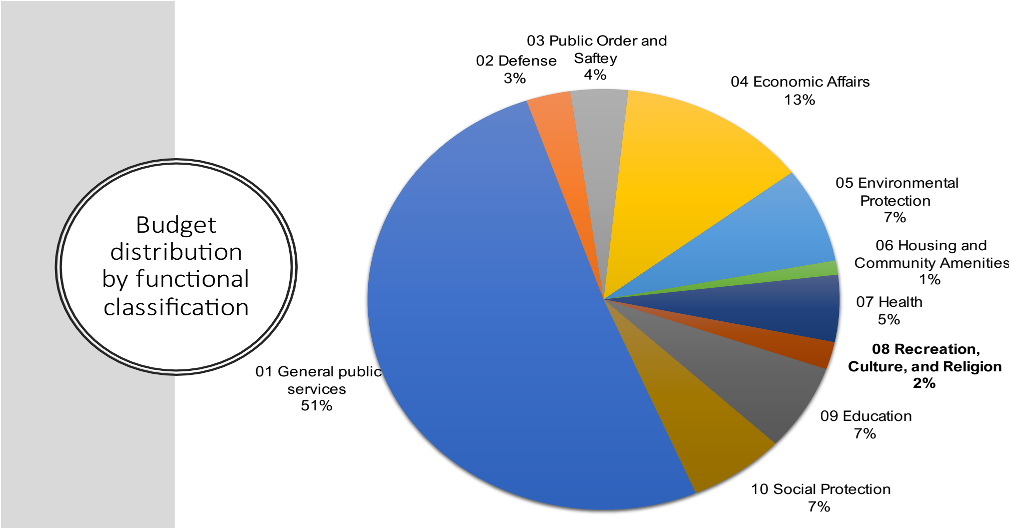


Figure 16: Budget distribution per functional classification Antigua and Barbuda Budget Estimates, 2021

Within the budget 08 Recreation, Culture and Religion, an assessment was made of the distribution of this budget for each area, namely Recreational and Sporting Services (1%), Cultural Services (27,1%), Broadcasting and Publishing Services (21,2%), Religious and other community services (0,15%) and Recreational, Culture, and Religion n.e.c (50%) in Figure 17**Error! Reference source not found.**.

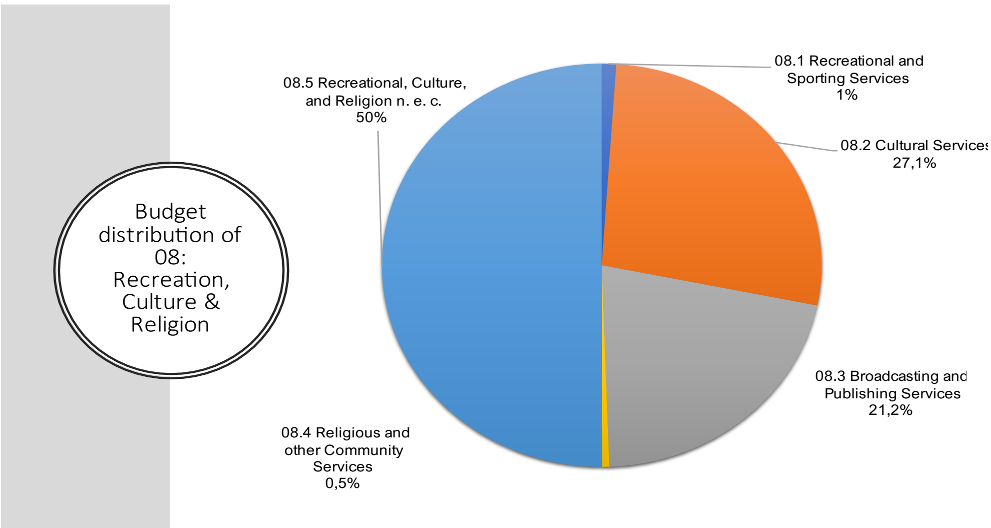


Figure 17: Budget distribution of 08: Recreation, Culture and Religion

If Cultural services is added to Recreational, Culture and Religion, n.e.c. it takes up 77,1% of the total budget for this budgetary area.

Figure 18 overleaf offers a comparison of budget allocations for the years 2019, 2020 and 2021. The changing position of the department of culture in government means that 'cultural services' is the only consistent allocation across all three years. Here the figures show that the contribution for cultural services has declined incrementally: from

$12 704 886 in 2019, to $11 782 371 in 2020 to $ 8 332 950 in 2021, while in 2021 there are new categories such as recreation, culture and religion; religious and other community services and broadcasting and publishing services which add $ 22 046 430,00 to the figure for 2021 (Antigua and Barbuda Budget Estimates, 2019, 2020 and 2021).

	2019 Budget	2020 Budget	2021 Budget
Recreational, Culture, and Religion n. e. c.	0	0	$15360 697,00
Religious and other Community Services	0	0	$162 395,00
Broadcasting and Publishing Services	0	0	$6523 338,00
Cultural Services	$12704 886,00	$11782 371,00	$8332 950,00
Sport and Recreational Services	$11337 774,00	$13939 196,00	$325 000,00

Figure 18: Comparative Budget Allocations for years 2019, 2020 and 2021

The Cultural and Creative Industries in Antigua and Barbuda

Drawing from existing evidence including the multiple surveys, government documents and reports, the status, form and shape of the cultural and creative industries in Antigua and Barbuda can grouped into five broad categories: the embryonic nature of the cultural value chains; the nature of cultural and creative work; the peculiarities of small island developing states and their dependency on tourism seasons; market access for cultural and creative goods and services; and finally, the importance of festivals.

The CCIs: an embryonic sector

The cultural and creative industries are embryonic in Antigua and Barbuda with incomplete value chains across multiple sectors and a high rate of multi-tasking within sectors as well as participation in multiple cultural value chains.

Figure 19**Error! Reference source not found.** shows a typical value chain with people, occupations, skills, resources, and support programmes spread throughout the value chain from beginnings, to production, distribution, exhibition, and audience reception. The model is based on the 5-column model of Charles Landry which was adapted for work in South Africa (CAJ, 2001) and the SADC region (ILO, 2003) to illustrate the importance of audience reception for the new cycle of creation (Beginnings). The Circulation/Distribution phase is a critical element of a full value chain as it represents the realization of value derived from the beginnings and production. Without key activity in this phase, there is a rich array of artistic and creative activity, products and services and even fully produced versions of these (music productions, choreographed dance productions, films, documentaries, recorded songs, plays, visual arts) but with no real access to markets (domestic, regional or international) and no or very few people dedicated to ensuring this access (distributors, agents, marketers, intermediaries, impresarios, publishers, labels, exporters, and the like).

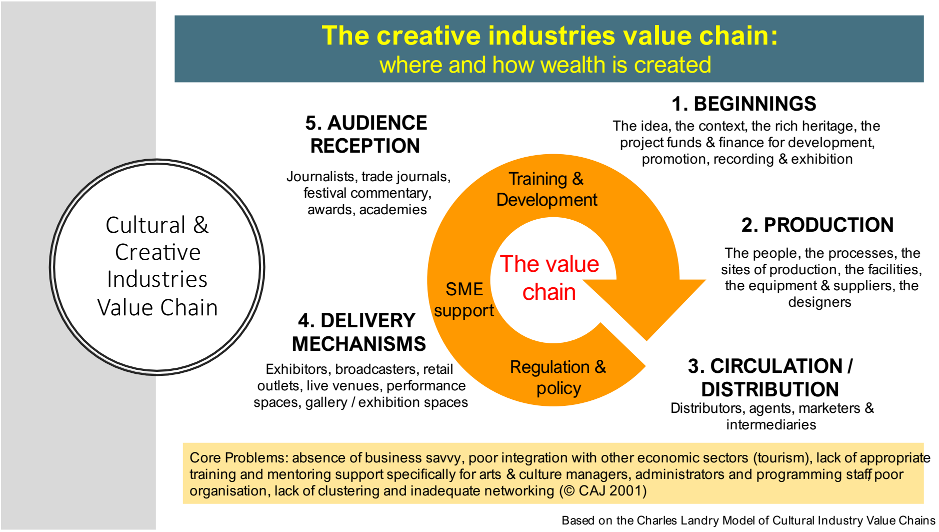


Figure 18: Cultural and Creative Industry Value Chains

Error! Reference source not found. Figure 20 schematically shows the incomplete nature of the CCI value chain. The bulk of occupations and activity fall in the beginnings and production phases with extremely few respondents indicating they were working in any of the other phases of the value chain. The import of this is that value cannot be captured within Antigua and Barbuda as core value added activities are not offered such as those that ensure cultural products and services are reaching the market, being exhibited, showcased and available for consumption and that the artistic and creative innovations are being made visible by journalists, awards, and competitions.

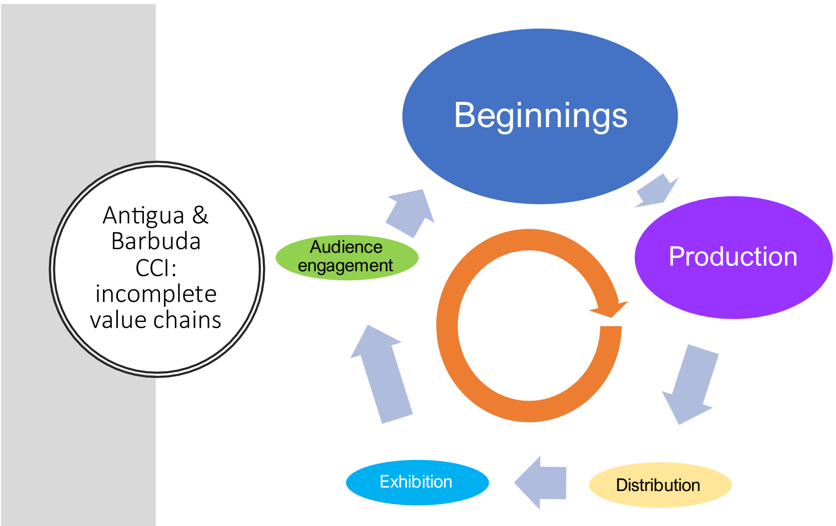


Figure 19: Antigua and Barbuda incomplete CCI value chains

Cultural and creative work:

Cultural and creative work is atypical often characterised by project or activity, short term, seasonal, part time or freelance. Work in the CCIs is therefore extremely precarious as many cultural and creative workers do not have regular income relating to their creative work. For many, working as a creative is often not their primary job, but rather a “side-gig”. Their employment elsewhere (public or private sector) would allow them to access social protection such as maternity benefits, pension, health benefits given national social security, medical benefits, and the education levy programme to which all employers and employee contribute. Registered business owners pay contributions to these schemes (as self-employed) and would also be eligible for benefits. So, while there are subsidies/ concessions available, creatives and cultural practitioners are largely unaware about these concessions. There is also a dearth of recording data in respect of the total sum of concessions awarded annually to creatives. However, practices and procedures in a country can exacerbate this inbuilt precarity by poor regulations and oversight.

The Antigua and Barbuda survey of 430 respondents highlighted problems with unprofessional conduct in relation to contracts; with difficulties in securing certain jobs or accessing income opportunities; with managing work life balance given the need to have regular paid employment; with inconsistent prices and fees and the lack of perceived value for cultural and creative work. This was exacerbated by the absence of a voice to the sector to represent the needs and interests of the cultural and creative workers. Some telling comments included:

- Contracts and professionalism: “Promoters failing to pay.” “Lack of resources, lack of professionalism on the part of other creatives, lack of understanding or honest dialogue about rates, nepotism, freelancers feeling the need to work for free constantly to prove themselves, a lack of emphasis on the part of creatives to put just as much emphasis on business sense as they do on artistry”. “Customers who are crediting my products and not paying in a timely manner.” “Lack of awareness for what the profession entails.” “Professional maligning.”
- Income opportunities and jobs: “Employment” “It is not easy getting jobs for Curtain Call Theater management.”
- Work life balance: “difficult balancing my daily jobs and music production hobbies.” “Insufficient time to produce enough work.”
- Pricing and value: “Not being able to charge adequate rates.” “Getting people to place adequate value on my work.” “The fact that I have been underrated and have not been given the chance to perform on certain shows or invited to promote the art form.” “Getting payment for performances especially government events.” “The perception persons had towards the creative industry goods and services weren’t valued. Person paid when they felt like and what they felt like. Work got bid down a lot.” “Value for work.” “Lack of financial compensation.” “Being underpaid for the quality or magnitude of work as a result of other creatives settling for less than expected.” “People don't value service providers when it comes to the art. They would prefer to import services to undermine the locals and their capabilities. Don't want to pay for services, want everything for free or think everything is too expensive”. “Getting clients to pay.” “Finding paying avenues for creative release. Don't think the

creative arts is respected enough in Antigua and Barbuda so people didn't want to pay for services rendered.”. “Lack of appreciation for the arts.”
- Associations, trade unions, organisations: “Lack of associated body for the cultural practitioners.” “Lack of representation from a body responsible for copyrights and other challenges faced.

SIDS and Tourism Seasons:

The precarity of cultural and creative work is overly determined by the dependency on tourism in a small island developing state such as Antigua and Barbuda. Respondents spoke to the impact on revenue when visitor numbers decline, the impact that hurricanes have on the tourism sector and therefore on their ability to earn income as well as the problem of transport for key assets such as steelpans. Comments include:
- Tourism seasons: “I have only been affected by the tourism seasons.” “Lack of opportunities within the tourism sector as a soloist (steelpan). “A decrease of visitors which results in decrease of revenue.”
- Climate challenges in SIDS: “Devastation of hurricane Irma to Barbuda.” “Difficulty of doing business in small island states.”
- Transportation: Lack of vehicles to transport pans. “Transportation in terms of a travel allowance is a necessity and it is not being offered even if it is required in my field of work.”

One responded summarised the lack of materials and difficulty in exporting:

“The majority of packing has to be imported. The time taken to do the back and forth to clear from the port can take a whole day. Process could be more streamlined, less costly. Exporting products is nightmarish, near impossible and definitely not timely. Had to rely on less ‘professional’ challenges to get my projects out.”

Market Access

Given the embryonic nature of the CCI sectors in Antigua and Barbuda, there is an expectation that access to markets are key to the success of creatives whether they produce product or services. Many creatives are not yet thinking about how to penetrate existing markets. Some key quotes from respondents follow; they provide insight into the difficulties and challenges in finding markets, knowing who to ask, location of domestic markets, marketing strategies, exposure, and access to information about markets. Some also highlighted the lack of appreciation for cultural products and services.

- Finding markets: “Finding more avenues to sell books. Getting proper exposure is difficult. “Not enough market.” “To put my music out to the international world.”
- Information and market intelligence: “Only persons who are well known will get an opportunity.” “Everyone wants experience but won’t give up and coming persons a chance.” “Finding information on how to effectively launch projects.”
- Marketing strategies: “Difficulties with regards to marketing the products. They are presently in storage.”

- Location of the domestic markets: “The location of the craft market. It is not ideally suited for tourism access or even local customers.”
- Market Exposure: “Not having enough exposure to song writers.”
- Lack of appreciation for cultural expressions: “Insufficient local appreciation;” “Keeping persons interested in the art form and its development.”

Importance of festivals

However, it is vital to note the importance of festivals in Antigua and Barbuda for the demand side of the cultural and creative expressions. Festivals provide a key platform for not only the distribution element but also the exhibition and audience reception of these cultural and creative activities, products, and services. Festivals generate both direct income streams as well as secondary revenues. Ticket sales, sponsorship, and merchandise fall in the first category, while plane tickets, hotel and guest house accommodation, car rentals, catering, media, and promotion as well as technical support expenditure (sound, lights, staging, festival management) and street vendors forms part of secondary revenues. Festivals are particularly important for catalyzing the imagination of the youth, stimulating innovations and experimentation with sounds, fashion, and other forms of cultural production. As captured in the booklet celebrating 50 years (1957-2007) of Carnival in Antigua and Barbuda by Cortright Marshall:

> “The cultural and creative industries are areas in which Antigua and Barbuda enjoy some comparative advantage and Antigua's Carnival is a prime example. As a socially integrative force and an outlet for cultural and artistic
> expressions, Carnival is presently one of the defining features of the country's cultural landscape.”

While there are many kinds of festivals (consumer facing, mixed consumer and industry, industry facing) Antigua and Barbuda focus on those that are consumer facing. The National Festivals Office reported an average attendance of 13900 patrons for festivals in 2015-2017 and 2018-2019 including Semi Finals Shows, Miss Antigua Barbuda, Jr. Party Monarch, Teen Splash, Melting Pot, Jr Carnival/Jr.Calypso, Panorama, Party Monarch, Calypso Monarch, and Parade of the Bands. With a total budget in 2015/2016 of $3,5million for Carnival and its relative activities and $500 000 for Independence and its related activities the calendar of events is supported by a combination of government support and private corporate financing. These make up the major contributors to the budgets of this annual calendar of events. The figure for Carnival and its related activities increased to $7 million in 2017, reduced to $6million in 2018 and increased again to $7 million in 2019. However, in 2020 and 2021 the estimated total budget of Carnival and its related activities substantially decreased to $1.7million. The budget for Independence and its related activities by contrast, stayed constant between 2015-2021. Revenue streams include ticketing and corporate sponsorship.

The combination of multiple types of festivals could support the promotion of the region/ country, increase skills, jobs, and foreign direct investment. However, this would require the development of linkages to associations across the globe and developed in Antigua and Barbuda. Without a local network of promoters, entrepreneurs and distributors, there will be no movement on the Antigua and Barbuda cultural value chains. For this Antigua and Barbuda needs to increase human resource development of agents, managers and promoters who understand the local and global scene to push Antigua and Barbuda industry forward.

As with the rest of the Caribbean region, Antigua and Barbuda is heavily dependent on tourism with the cultural and creative industries deeply integrated with the tourism sector. It can in fact be said, that tourism in SIDS rely heavily on cultural expressions to attract visitors who are increasingly less interesting in sun, sand and sea but more interested in visitor experiences relating to culturally specific food, cultural activities such as music, festivals, carnivals, performances, and to absorb local cultural experiences.

UNCTAD has noted the importance of the cultural and creative economy to the Caribbean region identifying festival tourism, music, and fashion as significant contributors to the GDP (Cook-Hamilton, 2020). The annual carnival of Antigua and Barbuda was cancelled in 2020 for the first time in 63 years (A&B: Ministry of Education, Sports and the Creative Industries, 2021: 2) which led to hardship due to loss of jobs and increased precarity (due to insecure income streams) of cultural and creative workers. UNCTAD notes the concerns about cancelled festivals and the added vulnerability resulting from the Pandemic on small and medium sized creative enterprises.

Despite its embryonic nature, the government is committed to strengthening culture as a driver of sustainable development. The key implementation mechanism for this was the planned hosting of the 15th iteration of CARIFESTA, the Caribbean Festival of Arts in Antigua and Barbuda in 2021, and then moved to August 2022. CARIFESTA is the Caribbean's multi-disciplinary art festival serving 20 countries and 16 million citizens of mostly young people (under 30 yrs.) (Antigua and Barbuda, 2021: 3). The festival moves from one island to another.

The fact that CARIFESTA was cancelled was not only a blow to tourism income, but it increased the hardship and pain of an already vulnerable sector of artists, cultural workers and practitioners who rely on these forms of activities.

Role of intermediaries

A significant missing element found amongst the 430 respondents are those playing the role of an intermediary for the cultural and creative sector or one of its sub-sectors. In a fragmented, hyper mobile, flexible sector such as the CCIs in which informality often dominates work and practice, cultural and creative workers often need intermediary organisations to access finance, business support, training and human resources, legal advice, market access or export facilitation. On the other hand, governments require intermediaries (associations, organisations, trade unions) to speak to and consult with artists, cultural workers and professionals spread across the multiple cultural value chains. Intermediaries (or what some call aggregators) can negotiate and interpret the social, cultural, and economic value that these sectors create.

Governments find it difficult to engage with the flexibility and agility that typifies the cultural economy – its fragmented nature, informal work, rapidly evolving skills and work methods, new business and distribution methods, as well as the extent to which it generates social and cultural as well as economic value.

The survey responses were analysed to find evidence of business advisory, support, promotion, project/event planning or any other form of activity which would ensure a constant supply of cultural product or cultural service for an ever-expanding audience or set of consumers.

The research produced by the Department of Culture's project demonstrates a lack of a key intermediary, those that participate in the Distribution part of the value chain (including producers, promoters, impresarios, distributors, exporters). These cultural practitioners and professionals make work for others, secure exports, and ensure that value is realised from productions and other cultural expressions. The threat from this is that not only does talent get enticed away out of the country, but the value produced by artists and creatives within the country is realised elsewhere.

The core public and private intermediation offered in Antigua and Barbuda for the CCIs are festival organisers/ promoters; museums, the Parks Authority, training and education institutions, and the Megaplex Entertainment Corporation of Antigua. The various Festivals, the Museum of Antigua and Barbuda and the Dockyard precinct all generate substantial multiplier impacts for the rest of the economy. They rely heavily on international flights, accommodation (hotels, guest houses), organised bus tours, independent taxis, rental cars, cruise ships, yachts, as well as the supply chain related to events including staging, lighting, sound, catering, make up, costumes, hair salons as well as all those involved in advertising and marketing (graphic designers, visual artists, copywriters, film makers, videographers).

Festival promoters

While there is no promoter's association, the responses from the four male promoters who responded to the specific survey were instructive in how a promoter's association would benefit the broader CCI sector. The survey found that all were self-taught and were self-financed. One promoter indicated he had secured a commercial loan while another was able to source sponsorships for his work. Collectively they employ just under 160 people, the majority of whom are male (75%). They host a range of cultural events/ fetes/festivals with one promoter managing 5, one 4 and the others both managing 2 events a year.

Attendance is calculated solely from tickets sold with audience figures at these events ranging from 70-100 people per session to 1800. One event, the Aloha Festival, attracts up to 2500 people. The budget allocated to these events is mostly between $40-50 000 although the Aloha Festival has a budget of between $100-140 000. Importantly, all the events have a high number of local performers (90-95%). Three events have a youth audience (16-24) with four events targeting young adults (25-40).

Digital take-up is limited to social media marketing but insignificant with respect to the live streaming or online showcasing of the events. For instance, none of the events were broadcast live although three mentioned they published clips and photos after the event. It is not therefore surprising that the pandemic drastically reduced the typical annual income for each of these promoters. The pandemic did however inspire one promoter to use more digital technologies while another indicated that "the approach to social media advertising has changed with more focus … placed on the new media."

The key needs for these promoters relate to an increase in concessions on goods and services associated with the execution of the events such as airline tickets and accommodation as well as special rates (police, hotels), tax exemptions or other forms of financial assistance (sponsorship). Professional training for all those active in the festival sector was seen as necessary.

Much of the festival sector economic impact is from external suppliers from catering, ticket sales, lighting, sound, infrastructure, transportations, security, media houses, generator services, fabric companies, graphic designers, and videographers.

The Museum of Antigua and Barbuda

The Museum of Antigua and Barbuda, with an annual revenue of $75,000, employs 12 people, and hosts the products of approximately 30 cultural practitioners. Since American, British, European, and Caribbean visitors make up the visitor demographic, the Covid Pandemic with its associate loss of flights and cruises was particularly harsh for the museum and the cultural practitioners who ply their trade to mostly international and regional visitors within the confines of the site.

The 30 cultural practitioners report needing support with marketing, greater finance, and funding as well as access to open spaces for their activities.

From a quarterly average of 2500 visitors, the Museum of Antigua and Barbuda experienced a huge decline during the Covid-19 Pandemic with visitor numbers averaging 600-624 per month. The Museum hosts cultural events and a Christmas party. None of their events are broadcast although the institution is now engaging with more virtual interactions since the pandemic.

The National Parks Authority

The National Parks Authority manages the Nelsons Dockyard National Park, a UNESCO World Heritage Site. With a staff complement of 100 people, the majority of whom are female, the Dockyard Precinct receives the most visitors with the institution recording approximately 150,000 visitors a year, mostly between December and April. The National Parks Authority earns an estimated revenue of $13,5 million from a range of events targeted at foreign visitors, such as the Antigua Charter Yacht Show, Talisker Atlantic Challenge, Superyacht Challenge, 8 March Project, Dockyard Day, Reggae in the Park, and a host of fishing tournaments.

While many of these events are elite (advertised in travel and luxury magazines and national tourism campaigns), the National Parks Authority undertakes educational outreach programmes in adjacent communities and, since some of these events are broadcast, they can reach a broader audience. While some of the reported needs of the institution are similar to those of other creative practitioners such as technical capacity and increased governance and regulation, some are specific such as stabilization of historical structures and attention to climate change adaptation and mitigation.

The Megaplex Entertainment Corporation of Antigua

The Megaplex Entertainment Corporation of Antigua has been operating for 15 years and reports being entirely self-financed. The corporation employs 22 people but also periodically contracts maintenance and repair people, cleaning services as well as audio visual technicians. The corporation receives approximately 15000 patrons a month with the busiest months being July and August when this figure can increase to 25000 patrons, although it depends on the release date of international movies. International movies make up 98-100% of the films shown. With each movie costing on average $17 and the average concession stand spend at $25 per patron, the average turnover per month is $630,000.00.

Regarding the showing of local films, the Corporation revealed that local films are very rare and are typically shown in a private setting for individuals renting the space.

The Covid Pandemic affected monthly and annual revenues due to the restrictive protocols in place. Going forward the Corporation would like to see lowered import fees as the cost of freight and charges continue to rise. They recognise the need to increase advertising and promotion and have begun introducing new ideas and promotional packages.

Challenges relating to the absence of intermediaries in business and finance or organisational representation

There is limited business support and some incubators, but there no specifically tailored intermediaries were found in business support, incubators, finance, export promotion. This role is currently played by the director of culture within government. While it is vital that government plays a role – as a cross ministry platform where one may access benefits and programs - it is in creating an enabling environment rather than in providing the services directly. As one respondent explained: “Government should keep out of the way of creatives and not make it hard.”

Business support provided by government includes the Prime Minister’s Entrepreneurial Fund for small businesses (to include creatives), the programs held by the business and branding development Antigua and Barbuda Investment Authority as well as those training sessions offered by the Department of Culture through programmes such as Stamp 268, NSSTF, Carnival, Exhibitions etc. Most of these platforms hosts a level of training, development, and promotion for participating creatives. There is also the work that is done by the Intellectual Property office that provides support on copyright and IP. Export promotion occurs through Tourism and the Marketing of the country[2].

[2] Personal communication from the Director of Culture.

Challenges emerging from the absence of this role within the private non-governmental space includes poor payout rates to artists and creatives, lack of financial access, spaces for artistic and creative practices or opportunities for professional development. Comments from the survey respondents include:

> "Spaces designated for the creative arts to showcasing or even selling products (goods and services)."
>
> "The implementation of financial board responsible for timely payments to creatives especially at festival time."
>
> "A financial board or committee responsible for stipulating the amount charged for gigs or one's work across the board."
>
> "A shared workshop for creative individual to set up work away from home. For example, a 'factory sell' that can be sectioned into workplaces tailored the individuals type of work. Spaces could be offered short or long term/ temp or permanency for a minimal fee."
>
> "National space to showcase what we have to offer."
>
> "A facility to provide materials for crafters."
>
> "A financial institution especially for creatives offering loans."
>
> "Educational facilities and laboratories."
>
> "Training facility or art institute dedicated to providing education and building of skills."
>
> "Organisations that teach persons a better or more unique way to do their business as well as teaching people how to price their product adequately."
>
> "A musical educational institution on island for the creatives."

There is also currently no representation of artists and cultural and creative workers and professionals. Some relevant comments in relation to a lack of representation and the need for collection society:

> "[There is] no assistance or governing bodies for Musicians and other creatives resulting in having to fend for oneself."
>
> "An association for all artists, with the expectation of paying dues and contributing to a pension plan
>
> "The Formation of a governing body for creatives to oversee and protect the rights of creatives"

> “The implementation of a body responsible for collecting in a timely and transparent manner, the royalties owed to creatives”

> “A negotiating body responsible for putting in place suggested income range for services offered by creatives”

The stability, growth, and strength of the CCIs in Antigua and Barbuda would be well served by establishing dedicated intermediary organisations with associated regulatory mechanisms to support robust cultural value chains for all CCI sectors. This role of intermediaries is detailed in Report 2 as intermediaries provide an important form of access – at arm’s length- to government services, funds and policies for individual creatives and cultural practitioners.

Access to the internet and implications for CCIs

These enterprises and cultural and creative practitioners in general rely heavily on access to the internet but figures suggest that 60% of the Caribbean population have access. In Antigua and Barbuda this figure is much higher with 76% having access (Kemp, 2021). This bodes very well for the growth and expansion of the contribution of CCIs to the economy of Antigua and Barbuda. It shows that Antigua and Barbuda is ahead in the Caribbean region in adopting and integrating digital technologies to stay abreast of global trends. The number of users increased by 0.8% between 2020 and 2021. Since these are ever changing and adapting, it is recommended that Antigua and Barbuda continue to place attention on global digital trends and their impact on the cultural and creative industries.

Mobile cellular services are also both popular, with high demand and has good penetration with research suggesting that there are 120 mobile subscriptions for every 100 people (https://www.bcsatellite.net/satellite-internet-in-antigua-barbuda/). Many use their phone to access the internet.

CCI sub-sectors in Antigua and Barbuda

The embryonic nature of Antigua and Barbuda’s Cultural and Creative Industries is evidenced by both the number of sectors each artist/creative respondent is involved in but also the multi-tasking and lack of differentiation there is in the respective value chains of each of the subsectors of the CCIs. The survey showed many respondents were active in multiple sectors as seen in **Error! Reference source not found.**. It also shows that Performing arts and crafts dominate activity in the CCIs.

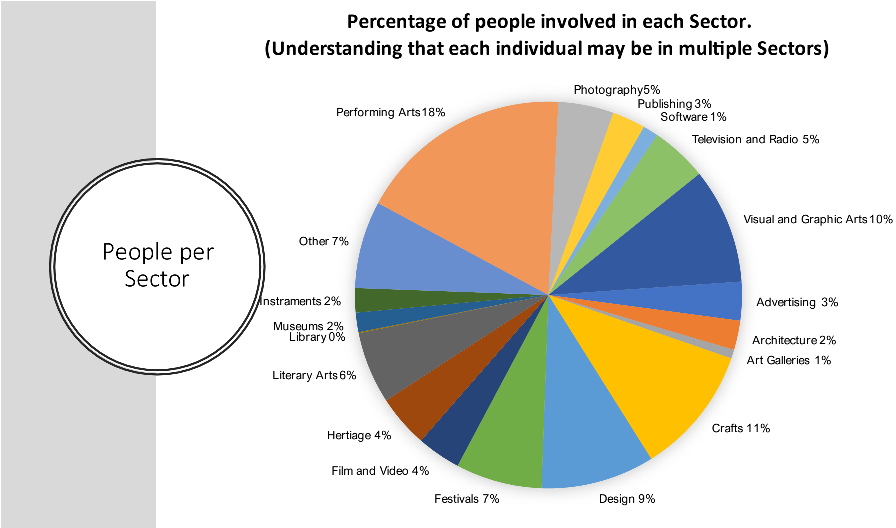


Figure 20: People per sector in Antigua and Barbuda

Using the UNESCO cultural domains (See Figure 8 on page 11) we grouped the responses for comparability across UNESCO reports in Figure below.

Antigua and Barbuda responses show that the bulk of activity is spread equally in Domains B - Performance and Celebration (25%) and Domain C – visual arts and crafts (25%). These are followed interestingly by Domain F – Design and Creative Services (15%), Audio visual and interactive media (10%) as well as an unidentified category of Other (10%). Domain D -Books and Press (9%) and Domain A – Cultural and Natural Heritage (6%) follow.

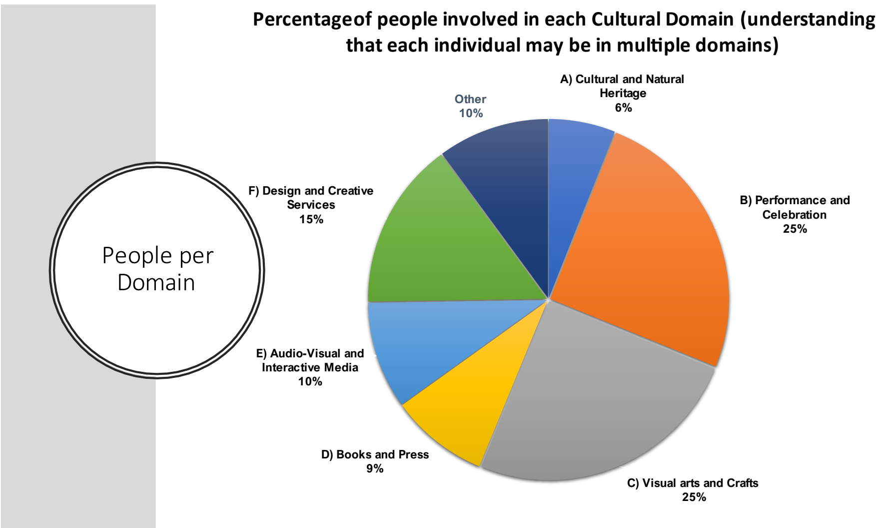


Figure 22: People by Domain in Antigua and Barbuda

A gendered look at participation in the various sectors (Figure 23 overleaf) has the following trends: women are more present in craft, design, heritage and literary arts and visual and graphic arts; less involved in architecture, festivals, film and video, performing arts, photography, publishing and television and radio. There is a more equal participation in advertising, museums, and in an unlabeled category, Other.

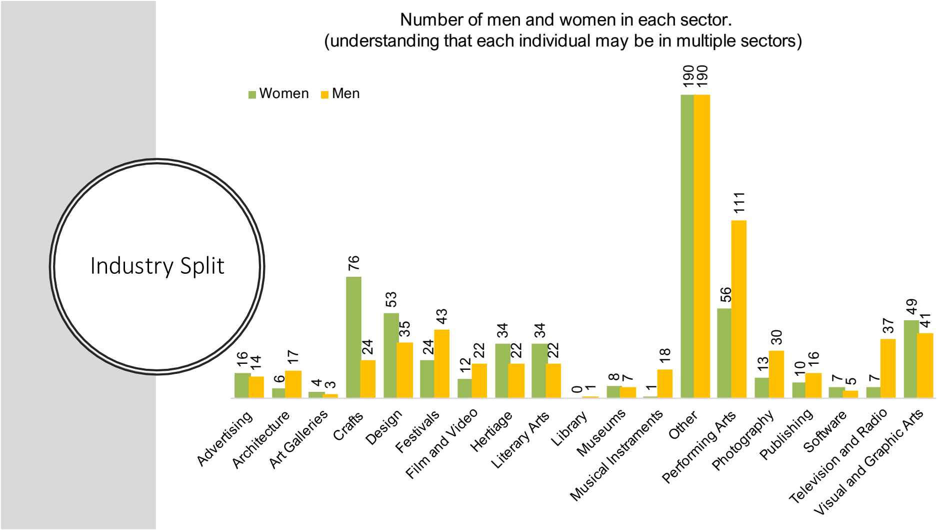


Figure 23: Men and women in each CCI sector

Relevant Skills, Training and Education for the CCIs

The fact that nearly 80% of the respondents indicated that they were self-taught (see Figure 24) is both a positive finding: demonstrating passion, commitment and dedication amongst artists and creatives; but it also points to the dearth of training programmes, access to apprenticeships and mentoring as well as the lack of formal educational opportunities at the tertiary level. This was a similar finding with respect to the promoters. Education needs to focus at basic and secondary education levels to develop an appreciation of the arts and cultural sectors and to offer business expertise. This will avoid an association of the arts with leisure and improve the status of the arts in Antigua and Barbuda.

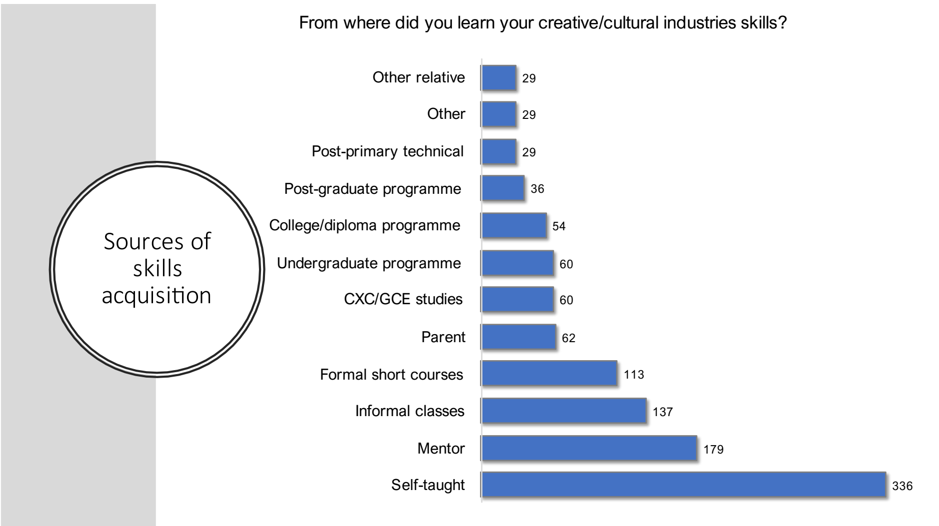


Figure 24: Source of skills acquisition

Interestingly some were able to access internships in the Caribbean region (the Institute of Jamaica, while others were able to travel further abroad (Denmark, Venezuela).
Still others have shown great initiative in learning from online sources such as YouTube.

The recent opening (27 May 2019) of the Five Islands Campus as part of the University of the West Indies is an important part of improving tertiary access, high youth employment and poor academic performance of OECS students in general. Currently students are enrolled in the first two years of franchised University of the West Indies studies in the Schools of Humanities and Education; Management, Sciences and Technology; and Health and Behavioural Sciences and will be able to complete their degree programmes whilst staying in the country (https://barbadostoday.bb/2019/06/27/uwis-fourth-campus-to-open-in-three-months/).

Freelancing, own account work versus paid employment

As is typical of the CCIs, freelancing, own account work, contractual work, and project-based assignments are very common. It is interesting that in Antigua and Barbuda this form of income generation (10%) is almost equivalent to those in paid employment (9%) (see Figure 25) from a total of 220 of the 430 respondents, with 51% saying they don't own and 49% who do.

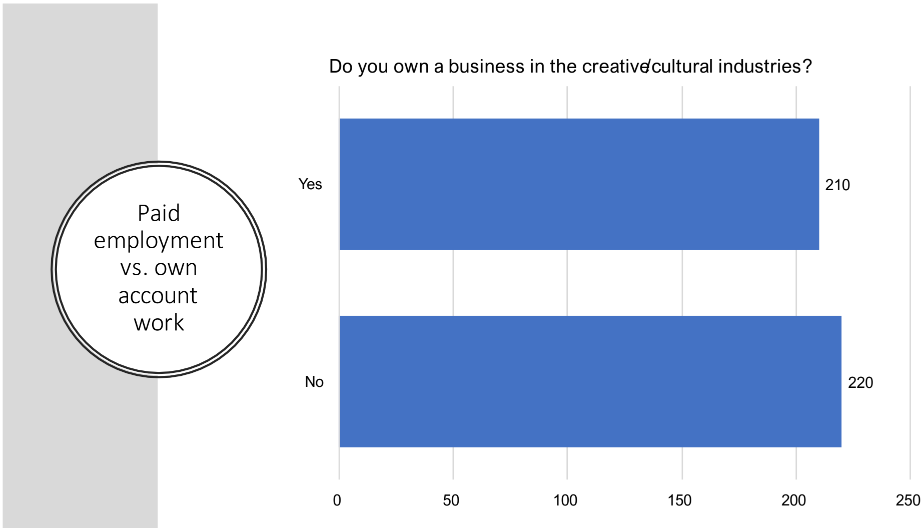


Figure 25: Paid employment versus own account work

Many respondents highlighted the precarity of their work and access to income opportunities as noted in the section on Challenges below.

This has a greater range when looked at by gender with more men being owners and employers than women as can be seen by Figure 26 overleaf. This gendered nature of ownership requires a set of policy responses to rectify this inequality.

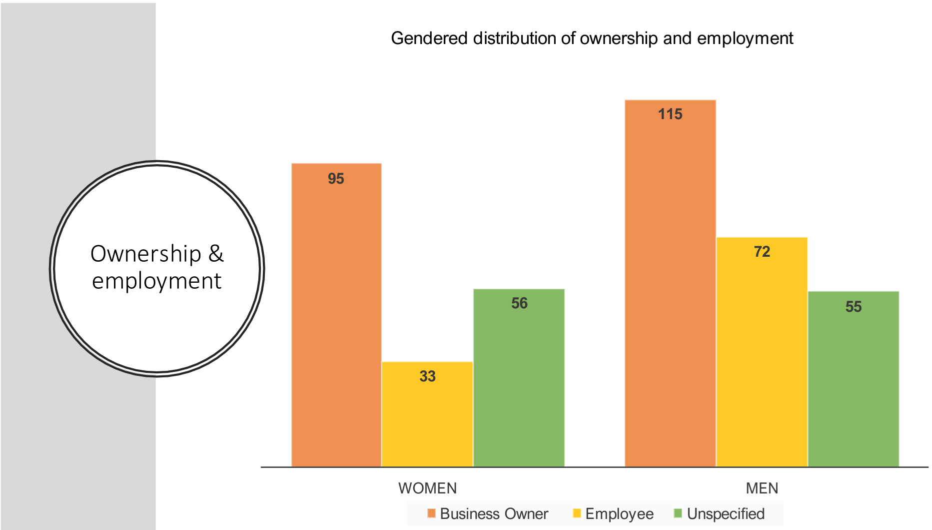


Figure 26: Gendered Distribution of Ownership and Employment

Sources of finance for cultural and creative enterprises

The survey revealed that more than 40% of respondents rely on self-financing and that more women are self-financing. Women appear less able to access commercial loans with none accessing development bank financing.

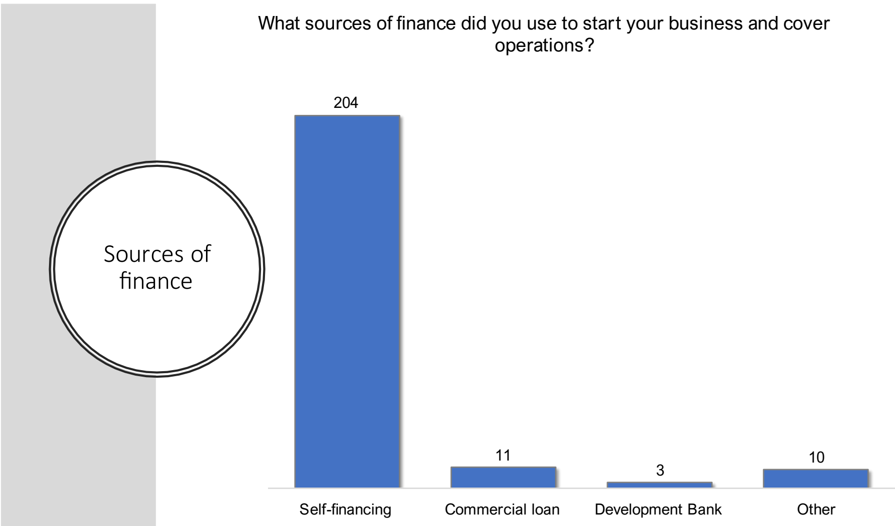


Figure 27: Sources of finance

Figure 27 shows that self-finance dominates access to finance in the CCIs in Antigua and Barbuda with 47.44% self-financed compared to only 2.56% accessing a commercial loan and less than 1% a loan from the development bank.

Challenges affecting the CCIs in Antigua and Barbuda

Covid-19 exposed the fault lines of the CCIs in the Small Island Development States, in particular the vulnerabilities created by precarious work and jobs and the reliance on gatherings, a public and tourism. These fault lines were described in detail by the survey respondents and related to the three key stakeholders, namely government (Policy, government, ministries, and departmental agencies), industry (associations and representative bodies) and the sectoral participants themselves (artists, creatives and cultural practitioners, enterprises, organisations and institutions, educational institutions and international partners) (Figure 28).

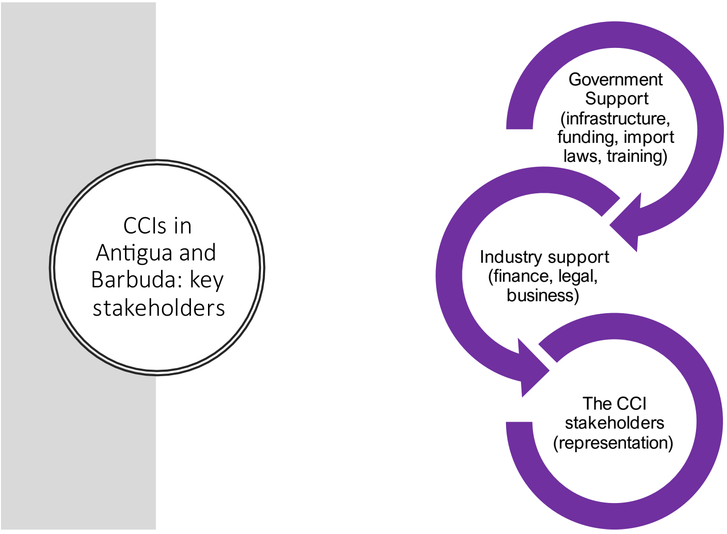


Figure 28: Stakeholders in Antigua and Barbuda's CCIs

Government Support

While there is a determined and focused attention from the Department of Culture, this is replicated in related ministries and departments such as tourism, education, labour, finance, or social development. The challenges that fall within the purview of government support or areas of responsibility are, according to the survey respondents, wide and relate variously to those in the Ministry of Sports, Culture, National Festivals and the Arts, Ministry of Finance, Corporate Governance and Public Private Partnerships; Ministry of Foreign Affairs, Trade and Immigration; Ministry of Legal Affairs Public Safety and Labour, Ministry of Public Utilities, Civil Aviation, Transportation and the Ministry of Social Transformation and Human Resource Development and Ministry of Education, Science and Technology as they touch on the provision of cultural infrastructure; the high costs of importation, transportation and import laws; funding and financing, training, youth participation as well as Intellectual property laws.

- Cultural infrastructure: Lack of space to host specific events. “Lack of art venues.” “Find suitable dance space without being over charged”. “Practice areas are limited and resources.” “No theatre space that is accessible.” “From a drama instructor's perspective, there is a lack of space for certain things such as rehearsal/practice room, dressing and storage rooms for prop and costumes. There is no phone, WiFi or computer access. A small research library would be essential, instead of having to seek outside sources.” “Space Is an issue because the classroom is too small for practice/rehearsals. The room itself is inadequate and we have to resort to using exercise mats to avoid s[p]linters (sic) and other injuries to my students during practice or rehearsals. There is no changing room for the cast. We suffer from the use of poor lighting and absolutely no equipment. There is no adequate storage space for costumes or props.” “Rehearsal venues and even production venues are challenges that my group faces.”

- Import and export concerns: “Overseas shipping was impossible and blocked me from accessing the global market.” Import of Equipment and materials: lack of or difficulty in getting raw materials. “Photography equipment is practically non-existent. Can’t get repairs here either. This drives up cost.” “Duties to import equipment are ridiculous especially considering that no one is supplying the tools that serious photographers need.” Getting supplies at an affordable price, import duties can be very high.” “Lack of good material.” “There are limited resources available locally as it pertains to raw materials and those that are available are very costly.” “There have been challenges in accessing raw materials/ textiles.” “High cost of materials.” “Shortage of materials.” “To source top of the line equipment.” “Sourcing material locally has always been a challenge since there are a limited quantity and quantity, The materials that are available are too expensive.”
- Intellectual property and IP: “Copyright laws are vague in Antigua. No discussion of residuals.”
- Support from government: “Lack of support from relevant cultural authorities.” “Lack of government support to build knowledge in different areas within the industry.” “Not enough events being hosted to showcase creatives products.” “Lack of financial support.” “Poor resources for training.” “Little support with production costs.” “Financial support and scholarship opportunities are limited if any in the creative industry.”

Industry support (table from survey – and of where finance is from)

Industry (finance, legal and services) support. Respondents were asked to note any specific type of assistance that would improve their quality of life or operations in their sector. The top five needs in the sector are reflected in the figure below (see Figure 29) with some of their specific concerns noted thereafter.

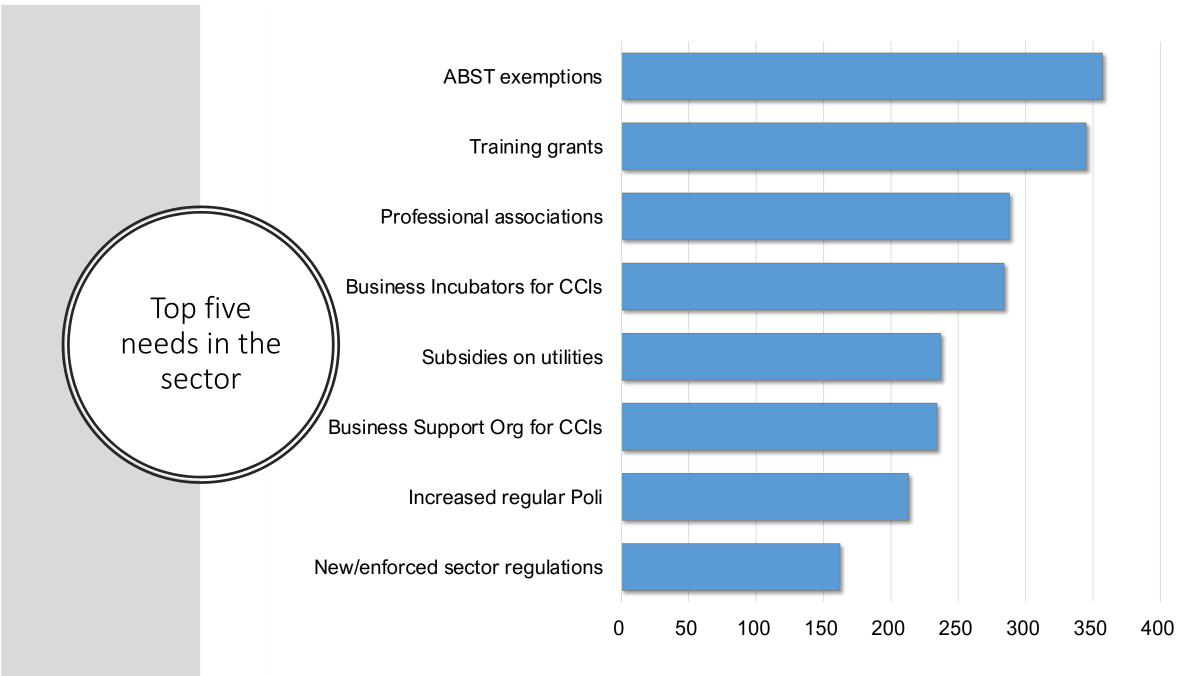


Figure 29: Top five needs in the sector

- Finance: access to funds, grants, and financing. “Access to capital funding, access to materials and resources, have to import a lot of my material, import duties are way high and there isn’t much support for creatives in the industry here. Lack of export and manufacturing capabilities of a high standard.” “Getting financing for materials locally has proven to be difficult.” “Lack of start up capital.” “Financial to publish book and promote.” “Money.”
- Legal services: “obtaining information in regard to legally starting your own business.”
- Support from industry (sponsorships): “Lack of financial and technical support.” “Seeking sponsorship for dance production.” “Financial challenges getting sponsors for events that we try to put together”
- Publishing: “Getting written material published proved to be challenging.”

CCI Sectoral Characteristics

Respondents’ comments in respect to the key characteristics of the CCI sectors covered three key areas: the nature of cultural and creative work and the need for multiple income streams; the dependency that CCIs in SIDS have on tourism seasons and its implications; and market access as related to both the regional and global markets and the need for raw materials, equipment, knowledge and market intelligence as well as exposure. These are summarised in Figure 30.

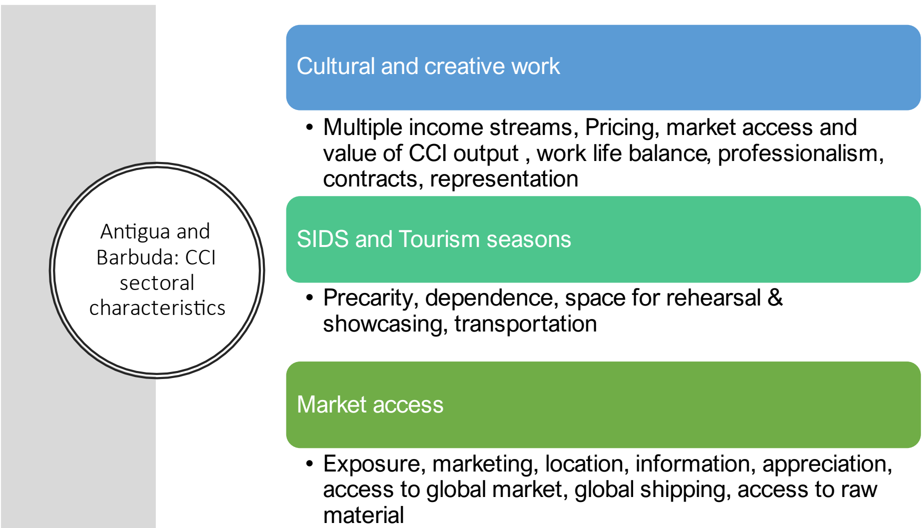


Figure 30: CCI sectoral characteristics

Impact of Covid-19 on existing challenges for the CCIs

Small Island Developing States such as Antigua and Barbuda have been hard hit by the global pandemic which has tested the resilience of particularly the tourism and the cultural and creative sectors. With world-wide travel cancelled or disrupted, and public gatherings not allowed, several critical revenue streams almost dried up completely: sectors such hotels, restaurants, art galleries, festivals, music, performing arts and fashion events were particularly hard hit. Cinemas, museums, and art galleries saw their doors being shut and concerts and festivals were postponed indefinitely. A critical question arising from this study must be how these cultural and creative industries can not only recover but “be transformed to more resilient in the future" as Pamela Coke-Hamilton, the UNCTAD Director of International Trade and Commodities has asked (Coke-Hamilton, 2020).

Loss of income

The majority of respondents (61%) to the Department of Culture mapping survey indicated that their income had decreased during the pandemic as evident in Figure 31 below. Interestingly, for a few (8%) their monthly income increased during the Covid-19 pandemic.

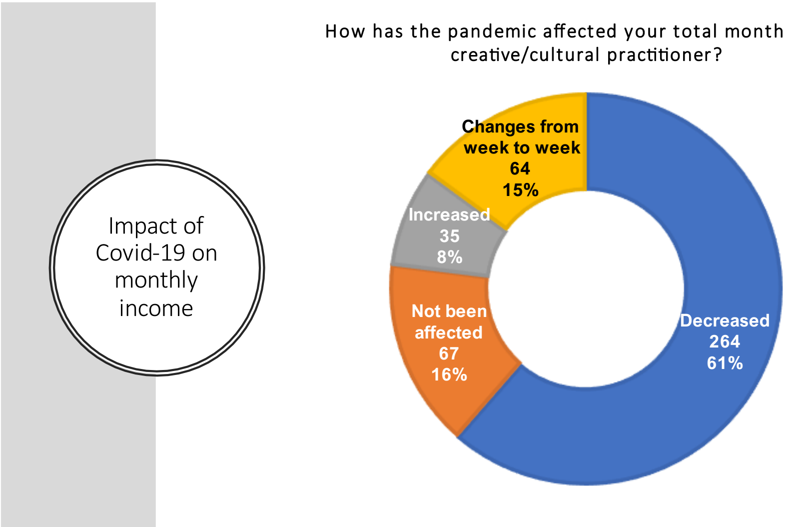


Figure 31: Impact of Covid-19 on monthly income

Information from ECCB shows specifically that the economy of Antigua and Barbuda contracted by 20,2% during 2020 although estimates show an expansion of real GDP (5.3%) in 2021 (ECCB, 2021). This growth is attributed to tourism with real value-added improvements in the hotel and restaurant sectors (15,9%). Slightly behind was construction (12%), and the wholesale and retail trade (10%) sectors. A concern remains that stay over arrivals remained below the 5-year pre average and only slightly above 50% of the levels achieved in 2019 (ECCB, 2021). The ECCB report is cautiously optimistic about the recovery path for Antigua and Barbuda:

> "Global inflationary pressures, partly driven by supply chain disruptions, continued to drive up consumer price inflation in 2021. The estimated expansion in economic activity resulted in a slight narrowing of the fiscal deficit in 2021 while outstanding public sector debt rose. The economy of Antigua and Barbuda is anticipated to continue its recovery path in 2022, as the global economy continues to recover from the pandemic. Geopolitical tensions associated with the war in Ukraine and inflationary pressures may however undermine this nascent post-pandemic recovery." (ECCB, 2021)

Loss of opportunities and impact on mental health

During Covid, when the survey was completed, the needs remained remarkably similar. As one respondent said: "The problems before the pandemic are amplified … unable to maintain a consistent flow." The following quote neatly summarised the combination of loss of opportunities for earning and mental health.

> “Sales are worse than before. There are moments of depression considering everything was on lock down. Business has declined significantly. My products are available for purchase but there is practically no market to provide goods for”.

For some it was the emotional energy needed to cope during the pandemic as illustrated in Figure 32 where personal health issues, creativity and motivation co-existed with energy required to support others.

Figure 32: Emotional Well-Being during Covid

For others it was the lack of work and loss of jobs, while for others still the combination of financial constraints and emotional wellbeing were clearly felt. Figure 33 shows the impact on personal income, on cruise line and airline travels, from the global lockdown, from the loss of tourism, on manufacturing, on disposal income and the loss from the cancellation of carnival.

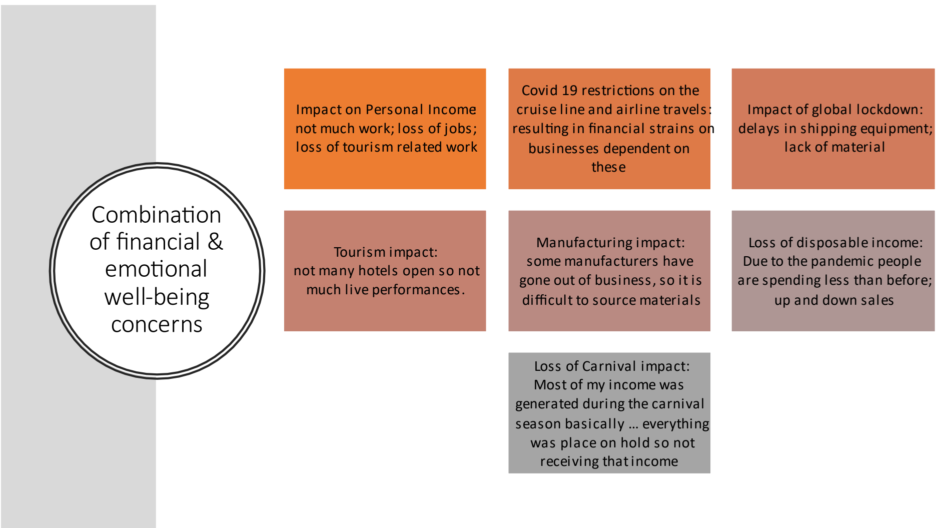


Figure 33: Combination of Financial and Emotional well-being concerns

Teachers and students

The Covid 19 restrictions were felt particularly by teachers and students including the inability to have productions, rehearsals, and classroom learning. As one respondent explains:

> "I still have not mastered the virtual theatre platform that the teachers are expected to utilize since the pandemic. Students are unable to practice for their CXC Exams because of the social distance requirement. The wearing of face masks made it difficult for sounds and facial expressions during production. Students were forced to project their voices putting a strain on their vocals. A lot of Pantomiming had to be added since certain things could not be done physically."

Gender equity and the participation of marginalised people

The CCIs are often referenced as unique in being able to contribute to the well-being of society and of women and marginalised people. Artistic innovation and creativity are seen as fundamental to organizing around a model of a community of practice (Wenger, 1998). Central to a community of practice is sharing, networking and cooperation. As a recent report explains:

> "Arts and cultural activities really do improve lives: they provide participatory creative activities that help restore people's well -being and increase their self-esteem, confidence and empowerment, as well as reducing anxiety and depression, and aiding social cohesion, education and personal development." (Dieses, 2018:4)

However, in the absence of a network of creative enterprises and collaborative work across the Antigua and Barbuda cultural value chains, the inability to fundamentally alter the participation and inclusion of women or other vulnerable groups is not surprising. A community of practice requires bonds of solidarity and care, supported by strong institutions of support and representative associations, rather than the existing sense of each person for themselves. The latter sense of 'aloneness' relates to an individualized anxiety related to the inability to secure stability in income earnings which, while predating Covid, has been massively exacerbated by the pandemic.

The survey asked all the respondents to highlight which groups were least active or present in the cultural and creative sectors in which they worked. That was recognised as the fairest way to ask about the extent of marginalization of vulnerable groupings from the CCI labor market. The results show the exclusion from the labour market of people with disabilities. People with disabilities were regarded as the least active/present in the cultural/creative sectors in which they worked as shown in Figure 33 overleaf.

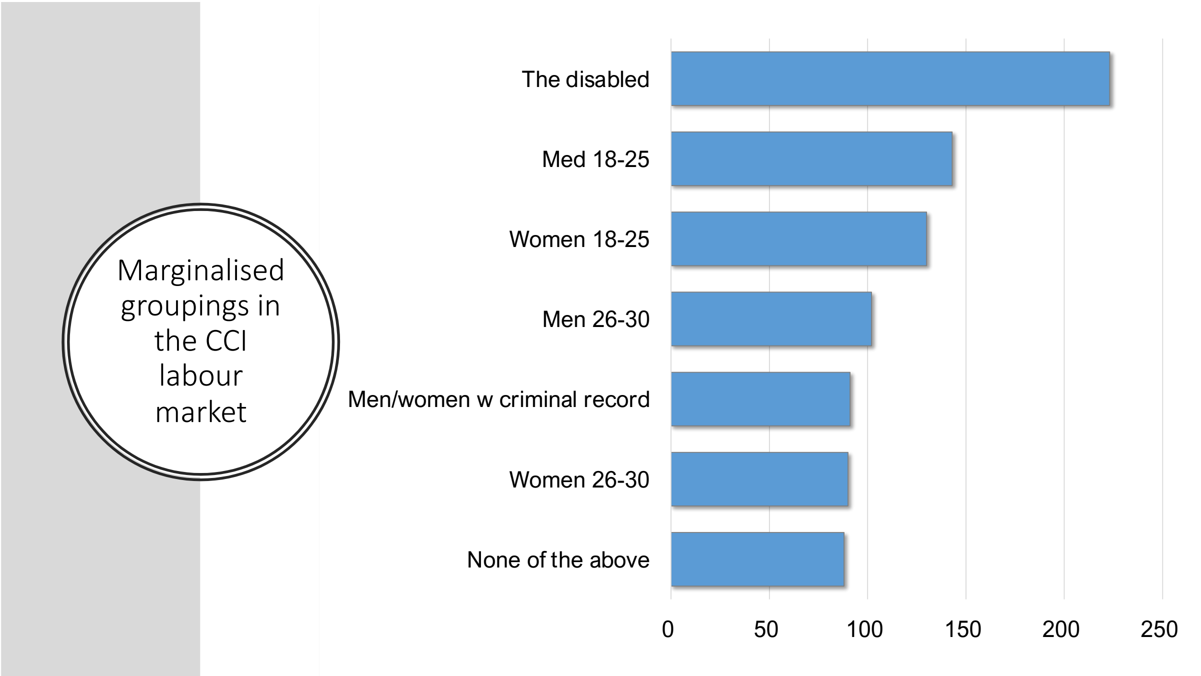


Figure 34: Marginalised groupings in the CCI labour market

Figure 35 shows the breakdown in each age group of the participation of women in the CCIs. It shows that women are clustered in a similar way to men with similar but slightly lower figures.

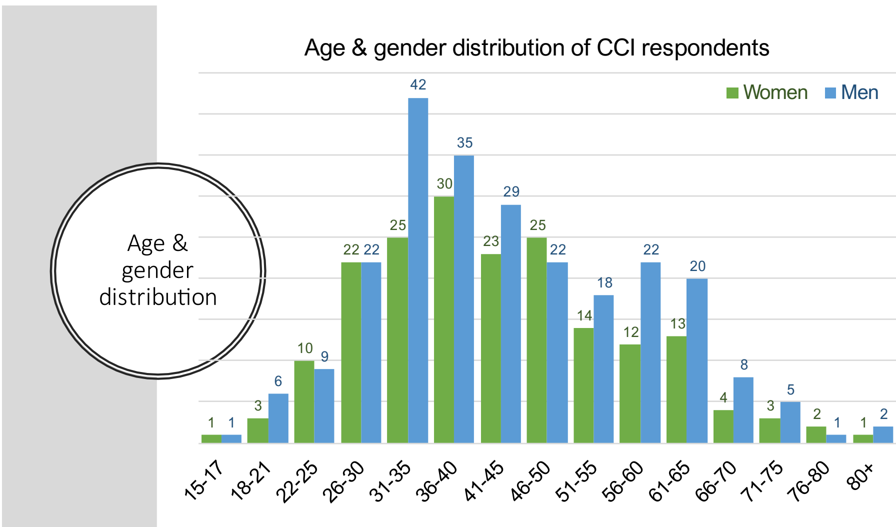


Figure 35: Gendered age group distribution

While the participation of women is relatively equivalent to that of men in the CCIs, several challenges remain for women. The gendered split of sources of finance for CCI businesses shows that women are predominantly self-financing (see Figure 36 overleaf). None of the women accessed Development Bank finance.

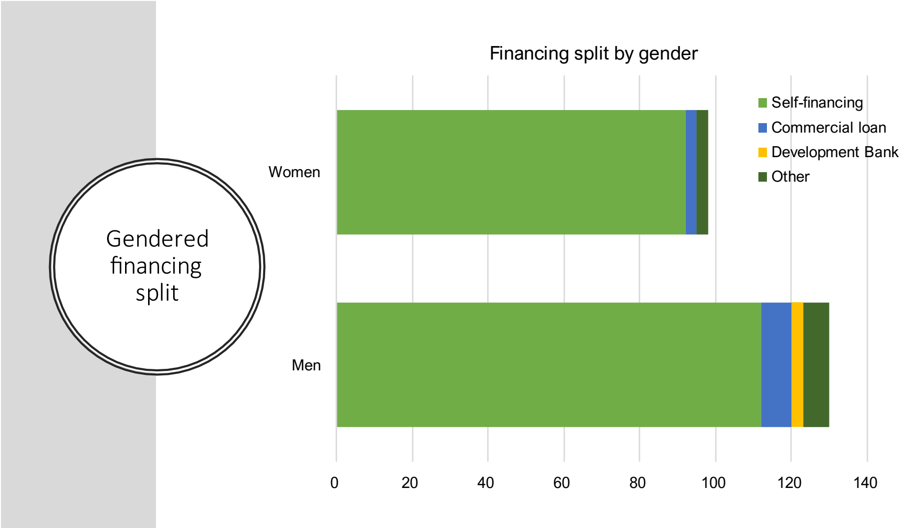


Figure 36: Gendered split showing sources of finance

Despite insufficient data on the role of women in the CCIs, it is possible to assess the challenges of the Tourism Sector, which is inextricably linked with all other sectors, to establish possible patterns of inequality and inequity. For instance, the UNDP's Future Tourism project showed while women form the bulk of the tourism sector workforce, the majority occupy lower paying and lower skilled jobs. In addition, it was found that women - owned businesses are less likely to have adopted new technologies. Technology adoption was found to be significantly lower (Tourism Watch, 2022). A government report shows that women are under-represented as tertiary graduates (33,3%) and in management positions (45,1%) although well represented in Senate (50%) and in tourism and government (60%) (Antigua and Barbuda, 2021:49). The Antigua and Barbuda government articulated a clear intention for gender equality:

> "Promoting and advancing gender equality and the empowerment of women in all spheres of life remains a priority of the Government. The Government… recognizes the need for greater levels of gender mainstreaming to promote the economic, social, cultural and political empowerment of women; as well as ensure that gender mainstreaming initiatives are included in all national policies, plans and programmes. In Antigua, women account for 52 per cent of the population while in Barbuda, they account for around 47 per cent." (Antigua and Barbuda, 2021:49)

Despite substantial work to attend to people with disabilities such as the Disabilities and Equal Opportunities Act with the establishment of the National Council of and for Persons with Disabilities, a register of persons with disabilities, and a Disabilities and Equal Opportunities and Rights Tribunal as well as the 2018 comprehensive mapping collecting data on persons with disabilities, civil society reports that substantial measures are still needed (UN and OECS, 2018: 12-13). A lack of capacity resulting in administrative challenges such as the delay in establishing the National Council of and for Persons with Disabilities is the primary reason for these measures that have not yet been taken. Civil society also reports inaccessibility, lack of sign language interpreters and the lack of timely communication on policy making. Ensuring the participation of persons with disabilities in the CCIs requires these challenges to be urgently addressed.

TOWS Analysis

1 Threats
- Global pandemics
- Disruption to international flights, shipping and cruise ships
- Absence of intermediaries in the CCIs
- Reliance on external distributors, export marketers
- Fragmented, unrepresented artists, creatives and cultural practitioners
- Poor uptake of digital technologies
- Lack of specialised training & education

2 Opportunities
- High HDI in Antigua and Barbuda (audience participation and payment)
- Excellent tourism offerings
- Commitment to stakeholder consultation and participation in policy
- CARIFORUM-EU EPA agreement for cultural trade
- Substantial diaspora in North America, UK and Europe
- Global market for niche festivals
- Increased exposure, showcasing from digital technologies
- ACP-Caribbean Regional Fund

3 Weaknesses
- No data or institutional capacity for research and marketing intelligence
- Limited resources and small budgets
- Policy not keeping up with new developments (digital, convergence, IP)
- Poor integration with stronger islands in CARICOM
- Strong policies but challenges with implementation
- Lack of identification of role of CCIs in tourism and implications for rest of the economy

4 Strengths
- Strong alignment of NDP to SDGs
- Government attention and budget for culture
- Draft Cultural Policy to develop
- Strong tourism hub in relation to sailing, yachting and marine services
- Resilient & creatives artists/cultural practitioners
- Strong CARICOM members to emulate

Conclusion

This report, *Report 1: Contribution of the cultural and creative industries to the economy and society of Antigua and Barbuda* demonstrated first, that the CCIs ought to be seen as part of the broader socio-economic development of Antigua and Barbuda; second that there is vibrancy and substantial activity in the CCIs but that it remains an embryonic sector; third, that as an embryonic sector with significant potential, it requires crucial support from a range of stakeholders including the artists, creatives and cultural practitioners involved in the CCIs; fourth, that there are key characteristics of CCIs which require specialist attention from a range of policy makers across government such as labour, trade, social development and finance and finally, that given the lack of support, there are a number of crucial areas currently receiving insufficient attention such as the role and participation of women and the participation of vulnerable groups such as persons with disabilities.

Report 2 Policy recommendations to strengthen the cultural and creative sector in Antigua and Barbuda, *as* a complementary report will address these challenges and recommend actions and policy responses for the various stakeholders including the Government of Antigua and Barbuda.

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