



**MINISTRY OF INDUSTRY,
COMMERCE, AGRICULTURE
& FISHERIES (MICAFA)**

NATIONAL CRAFT POLICY
An Integrated Approach

November 2017



Table of Contents

EXECUTIVE SUMMARY	5
1. INTRODUCTION.....	12
1.1 Background.....	12
1.2 Policy Rationale.....	13
1.3 Purpose	14
1.4 Scope.....	14
2 DEFINITION OF KEY TERMS.....	15
2.1 Cultural/ Creative Industries.....	15
2.2 Visual Arts	15
2.3 Fine Arts	15
2.4 Souvenirs	16
2.5 Tourist Art	16
2.6 Crafts or Artisanal products.....	16
2.7 Craftsmanship.....	17
2.8 Artisans.....	17
2.9 Artist and Craft Producer.....	18
2.10 Authentic Jamaican Craft	18
3. SITUATIONAL ANALYSIS.....	22
3.1 Craft Development in Jamaica: Major Government-led Support Measures to date.....	22
3.2 Profile of the Jamaican Craft Sector	29
3.2.1 Contribution of the Craft Sector to the Jamaican Economy.....	29
3.2.2 Employment	29
3.2.3 Tourist Expenditure on Craft Items.....	31
3.2.4 Potential market size	31
3.2.5 Developing a profile of Jamaican craft producers	32
3.3 SWOT Analysis of the Jamaican Craft Sector	33
3.3.1 Strengths of the sector.....	33
3.3.2 Weaknesses	33
3.3.3 Opportunities.....	36
3.3.4 Threats.....	37
4. POLICY AND LEGISLATIVE ENVIRONMENT.....	38
4.1 Current Regional and International Environment	39
4.1.1 The UNESCO Conventions and United Nations 2030 Agenda.....	39
4.1.2 International Copyright Treaties.....	40
4.1.3 Regional and International Trade Agreements.....	42
4.2 National Environment	43
4.2.1 Vision 2030 Jamaica: National Development Plan.....	43

4.2.2	Support to Micro and Small Enterprise Development	45
4.2.3	Support to Cooperatives and Clusters	45
4.2.4	Cultural Policy and Craft Development	46
4.2.4	Conservation of Heritage.....	47
4.2.5	Tourism and Craft Development.....	47
4.2.6	Industrial Policy and Policies to support the development of new industries.....	52
4.2.7	Intellectual Property Legislation	52
4.2.8	Product Standards Legislation.....	53
4.2.9	Environmental Legislation	54
5.	KEY POLICY ISSUES	56
5.1	Input supply.....	57
5.2	Production	57
5.3	Wholesale.....	58
5.4	Retail.....	59
5.5	Consumption	60
5.6	Cross cutting issues	61
5.7	Critical success factors in implementing a Craft Policy	65
6.	NATIONAL CRAFT POLICY FRAMEWORK	67
6.1	Vision Statement.....	67
6.2	Goals	68
6.3	Principles And Values	68
6.4	Objectives And Strategies To Address Policy Issues	69
7.	IMPLEMENTATION PLAN	79
7.1	Key Stakeholders and Roles	79
7.2	Organizing for Implementation	83
7.3	Implementation of Action Plan.....	83
	CONCLUSION.....	97
	APPENDIX.....	98
	BIBLIOGRAPHY.....	120

LIST OF ACRONYMS

BIMAC	Bamboo and Indigenous Materials Advisory Committee
BSJ	Bureau of Standards Jamaica
CBI	Caribbean Basin Initiative
CARIBCAN	Caribbean-Canada Trade Agreement
CARICOM	Caribbean Community/ Caribbean Community Secretariat
CBE	Community Based Enterprises
CEO	Chief Executive Officer
CPTC	Creative Production Training Centre
CSME	CARICOM Single Market and Economy
CTE	Community Tourism Enterprises
CVQ	CARICOM Vocational Qualifications
EFJ	Environmental Foundation of Jamaica
EMC	Edna Manley College for the Visual and Performing Arts
EPA	Economic Partnership Agreement
GI	Geographic Indications
HEART	Human Employment and Resource Training Agency
ICH	Intangible Cultural Heritage
ICT	information communication technologies
INBAR	International Network for Bamboo and Rattan
INCRAFT	National Institute of Craft Limited
IOJ	Institute of Jamaica
IPRs	Intellectual Property Rights
ISCO	International Standard Classification of Occupations
ITC	UNCTAD/WTO International Trade Centre
JAMPRO	Jamaica Promotions Corporation
JBDC	Jamaica Business Development Corporation
JCDC	Jamaica Cultural Development Commission
JEA	Jamaica Exporters' Association
JIPO	Jamaica Intellectual Property Office
JMA	Jamaica Manufacturers' Association
JTB	Jamaica Tourist Board
MCGES	Ministry of Culture, Gender, Entertainment and Sports
MDAs	Ministries Departments and Agencies
MICAF	Ministry Industry, Commerce, Agriculture and Fisheries
MT	Ministry of Tourism
MTM	Ministry of Transport and Mining
MSME	Micro Small and Medium Enterprises
NEPA	National Environmental Planning Agency
NRCA	National Resources Conservation Authority
NTA	National Training Agency
OAS	Organization of American States
OVOP	One Village One Product
STATIN	Statistical Institute of Jamaica
SWOT	Strengths, Weaknesses, Opportunities, Threats
TJL	Things Jamaica Limited
TPDCO	Tourism Product Development Company
UDC	Urban Development Corporation
UNCTAD	United Nations Conference on Trade and Development
UNESCO	United Nations Educational and Scientific Organization
UNIDO	United Nations Industrial Development Organization
COTED	Council on Trade and Economic Development
WIPO	World Intellectual Property Organization
WTO	World Trade Organization

EXECUTIVE SUMMARY

Introduction and Background

This Policy aims to streamline the Jamaican Craft industry by facilitating incremental and significant improvements in quality, variety, value, sales, customer satisfaction and profits in order to promote greater local identity of finished craft and souvenirs, innovation, better supply capability, packaging, regulation and production and distribution facilities. The Policy will address factors which are critical to the sustainability and growth of the craft industry in Jamaica and which enable successful enterprise in the areas of craft, gifts, visual arts and souvenir products. It will also elaborate on strategic objectives from the sourcing of raw materials to the packaging and branding of an ‘Authentic Jamaican’ brand, to ensure that local craft designers, producers and traditional artisans benefit from the marketing and commercial opportunities provided by the tourism industry, Corporate Jamaica, local consumers, the Diaspora and exports into other tourist and international gift markets.

Jamaica has a rich cultural history in craft and over time, several projects and programmes have achieved varying levels of capacity building and financial success. Craft production in Jamaica at the community level has traditionally been of both cultural and economic significance. Authentic Jamaican Craft is a by-product of the rich cultural landscape of Jamaica, the legacy of the history and traditions of this Cultural Superstate. Since Independence, the Government of Jamaica has consistently recognized the importance of support for the conservation of the visual arts heritage of Jamaica and the development of the indigenous craft industry. In recent times, several strategic planning processes spearheaded by the government have highlighted the importance of the craft sector and the need to move forward with action plans to ensure its further development. These include the Vision 2030 National Development Plan, the MSME and Entrepreneurship Policy, 2002 Master Plan for Sustainable Tourism Development (Tourism Master Plan) and most recently the Creative Industries Business Plan funded by the World Bank through the Foundations for Competitiveness and Growth Project. Past and existing measures aimed at support for local craft development within the framework of government institutions have been reviewed as a component of the policy development process.

An estimated 9943 persons were employed in formal establishments of craft-related trades and production in 2013, declining marginally by about 1% from 10054 in 2010. An estimated 1983 self-employed craft traders were registered to operate within the 15 resort area craft sites across Jamaica as of November 2015. Employment related to the craft sector is also created through the sale of craft gifts and souvenir in retail outlets. The exact number of outlets and the number employed are unknown. In 2012, Jamaica’s imports of art crafts amounted to US\$4.28 million, increasing over the two previous years. Imports of design goods including fashion, interior accessories and jewellery amounted to US\$82.45m. Imports of visual arts, including paintings, photography, sculpture and other categories were valued at US\$2.69 million. (STATIN, 2014)

As one pillar for the strategic recommendations presented, the policy and legislative environment impacting craft development in Jamaica has been reviewed in relation to commitments made at

the international, regional and national level. Regional and international linkages include those related to the UNESCO Conventions and United Nations 2030 Agenda, international copyright treaties and regional and international trade agreements. Within the national environment, there is common purpose with respect to support to micro and small enterprise development, industrial policy and policies to support the development of new industries, cultural policy and craft, conservation of heritage, product standards legislation and environmental legislation, support to cooperatives and clusters which are referenced within the draft policy and strategy framework as well as with selected recommendations of the 2002 Tourism Master Plan and other plans to support tourism and craft development,.

The Draft Policy and Strategy are further informed by global models of support to craft development, including institutional support to craft development; experiences in providing an enabling environment and legislative support; protecting identity; innovative approaches to visual arts and crafts education and training; public marketing and promotion and craft cluster and consortia development. This review of best practices is a key input to a SWOT analysis of the Jamaican craft sector and a Gap Analysis with reference to the development of the Craft Value Chain.

Defining Authentic Jamaican Craft

Craft, visual arts and artisanal products are varied in type and are difficult to define and classify due to their lack of homogeneity. For the purposes of the National Craft Policy and Strategy of Jamaica, '*Authentic Jamaican craft*' will be defined as *any traditional cultural expression, contemporary cultural expression, artisanal product, visual art, fine art, souvenir or craftsmanship-based design*, which satisfies the following criteria. It is:

- made or assembled in Jamaica utilizing manual or mechanical techniques, in respect of which the direct manual contribution of the artisan remains the most substantial component of the finished product; and
- made or assembled by a Jamaican citizen or registered Jamaican company, and
- meets existing national quality standards or new standards established based on stakeholder consultations, and
- is comprised of raw material components originating solely from Jamaica and used in a natural, modified or semi-processed state as an input to production; or utilizes at least 51% Jamaican raw material, or where the principal raw material is not made in Jamaica, has at least 70% local input. Local input is defined by the value of production that is incurred in Jamaica which includes “a significant change” of any imported material that is not available and not produced in Jamaica.

Policy Rationale

In the past few decades, there has been a decline in the application of traditional craft production skills in Jamaica, this is largely attributed to competition from imports as well as the aging population of master craftsmen and a general global shift away from labour intensive production to technology enabled industries. While craft production is still pursued as a component of

technical and vocational subject areas in some schools, the lack of integration of these traditional skills with design, technology, environmental science and entrepreneurship skills as core components of an upgraded curriculum cause many young people to consider the pursuit of craft enterprise as an unviable career option. Within the marketplace, the packaging and presentation of some Jamaican craft is not competitive with similar design-led, handmade or artisanal products made internationally and is therefore less attractive to the potential customer. In addition, there is the need to improve the atmosphere and environment of the locations where craft is presented and sold. The Jamaica Business Development Corporation (JBDC), an agency of the Ministry of Industry, Commerce, Agriculture and Fisheries (MICAF), has the mandate for, and has led, the strategic developmental priorities of the craft industry from ‘concept to market’, including its demonstrated leadership in the local market with the Things Jamaican chain of stores. However the JBDC has been unable to secure commitment to ongoing financial and other resources to strengthen and expand its existing product and collection development, capacity building and marketing programmes, which take the form of an integrated developmental approach. There has been low appreciation of the economic aspects of the craft industry as a crucial component of Jamaica’s cultural and creative industries network and its significant potential for generating foreign exchange earnings and a positive impact on livelihoods along an extensive value chain. This has resulted in an absence of the level of investment and the resources needed to support real industry development. This skewed perspective has further led to a fragmented approach to the development of an effective support system for the industry at the institutional level, leaving holes in the ecosystem with respect to appropriate systems that will ensure sustainability and consistent product quality e.g. financing suited for the scope and scale of operations in the industry, the effective monitoring of the quality of products being sold on the open market as authentic Jamaican products..

The revised MSME and Entrepreneurship Policy 2017 which is derived from and aligned to the Growth Strategy addresses cross cutting issues that will support the development of the craft industry as craft enterprises constitute a significant component of MSME sector.

A policy for the development of the craft industry allows the GoJ to establish clear guidelines for the development of authentic Jamaican craft as traditional cultural expressions, design-led as well as artisanal decorative and functional objects, visual art for collectors, wearable art and fashion, souvenirs and trinkets. The development of quality craftsmanship skills has the potential to create additional spin-off opportunities in other economic areas. The craft industry is a potential lever to generate new economic opportunities and employment, while sustaining livelihoods and contributing to social cohesion. The articulation of a policy and related implementation strategies, based on stakeholder engagement, provides a focal point for the engagement of inter-agency collaboration to support the development of individuals, associations and communities toward common goals in the industry’s development; while streamlining the allocation of human and financial resources to optimize their impact.

An Integrated Approach to Craft Industry Development

The approach to the development of the craft industry will be integrated and inclusive. It will be led by MICAF as the Ministry with mandate for industry development with the support and its agencies and other MDAs. JBDC is the lead agency in MICAF with operational responsibility for enterprise development in the craft industry. JBDC employs a multi-faceted approach in enterprise development working within the Ministry's policy guidelines and working with other agencies of MICAF, including COJ, BSJ, RADA, DCFS, JIPO, NCRA the Trade Board and others. As a part of the wider cultural industry, craft is an important facet of Jamaica's tourism product and the overall visitor experience. Authentic Jamaican craft products developed using local skills and materials are important symbols of the national cultural identity and heritage and are therefore an essential component of what constitutes Brand Jamaica. The development of attractive product offerings with appropriate presentation has the potential to increase visitor spending and therefore indirect and direct exports of these products, increasing employment and the economic contribution of the sector. Specialized stores such as Things Jamaican and targeted events offer unique immersion experiences to the visiting shopper. The organization of producer clusters within attractive, special purpose infrastructure, such as the proposed Artisan Villages will create opportunities for further multiplier effects.

Strengthening and Expanding the Craft Value Chain

There are various segments in the market for gifts and craft, ranging from souvenirs and trinkets to manufactured, design-led to one-of-a kind- handmade objects, reflecting various price points. As such there are two distinct groups of craft industry persons operating in Jamaica. One group, which is on the productive end of the spectrum and consists of highly skilled master craftspersons with traditional skills as well as others who might be described as new generation, design-led and well-educated individuals with advanced creative skills. The latter segment for the most part earns or has the capacity to earn a living producing high quality design-led objects and collections for the local and export markets, therefore several of these persons are highly regarded in Jamaica, regionally and internationally. There is however, generally, no relationship between these highly skilled artisans and creators of Authentic Jamaican craft to the retail outlets in the tourism sector.

There is a second group however, whose members while creative, may not possess the level of education, skills training or experience in the making of traditional crafts that is essential to success in their chosen field. A significant number of the persons in this group are craft vendors who source the products they sell from local suppliers, some of whom import crafts from India, Indonesia and Haiti. These "pseudo-craft workers" spend much of their time and talent embellishing these items. They operate in the fifteen recognised craft markets, which are overcrowded. Indeed, purchasers are offered limited variations in product that are less attractive to a potential visitor or resident seeking attractive and interesting souvenirs, unique visual art pieces or quality craft items for decorative or functional purposes. It is also the case that some major tourism entities, working in collaboration with vendor associations, provide limited selling opportunities to a few craft vendors on an extended rotation basis on certain days/ nights. Within

the last decade, the JBDC researched and prepared management and development plans on behalf of TPDCo for all 15 markets which constitute a foundation for the redevelopment of these critical marketing points for Jamaican craft, including their re-orientation into Artisan Villages.

The accommodation sub-sector and hotel retailers need to be encouraged to support producers and vendors of authentic Jamaican craft. Some have cited high price points and limited supply capability as reasons for turning instead to imported gift and craft solutions. As such, vendors feel locked out of the supply chain, for two reasons. Firstly, tour operators charge high fees to promote the craft markets as destinations, and secondly, visitors perceive craft markets to be characterised by harassment and security concerns, both of which pose barriers to promotion and visitor engagement.

Finally, there is little attention to the development of sustainable and innovative products or to customer demand. Use of sustainable sources of raw material and greater use of reclaimable and recyclable materials in products and packaging to enhance environmental friendliness is a key concern, as is product quality and traceability. An example of this approach is the current initiative with the development minerals value chain which is studying clay and semi-precious stone deposits and aligning product and commercial developments in close proximity to these resources. The potentially lucrative corporate gift market is also underserved but there are encouraging developments with the recent initiative between the Ministry of Tourism, JBDC and private sector associations for the 'Christmas in July' Corporate Gifts Showcase.

Policy Vision and Goals

The vision of the National Craft Policy and Strategy of Jamaica is a viable, sustainable, diversified and internationally competitive industry, showcasing authentic Jamaican products in order to sustain livelihoods, leveraging the inherent creativity in cultural expression of the Jamaican people and enhancing the value of the national brand, within a dynamic, enabling environment for its development. The main policy goals are:

1. To develop a streamlined and rationalized sector, positioned for growth, expansion, increased employment and contribution to national earnings through appropriate institutional support, incentives and sustainable financing.
2. To protect traditional cultural expressions based on culture and heritage through structured interventions, including but not limited to, the provision of training, support for branding and intellectual property protection
3. To create an appropriate enabling environment for the development and production of new authentic Jamaican craft, visual arts and souvenir products through the implementation of standards and support systems for growth in new product and market development
4. To enhance revenue streams and profits of legitimate craft producers and vendors through expanded customer access, increased customer satisfaction, quality, product variety, customer-centric market spaces and value for money

5. To develop the craft value chain, for authentic and innovative Jamaican craft, in an environmentally sustainable manner by the expansion of linkages with other economic sectors.

Key Principles

The following principles are enshrined in the National Craft Policy of Jamaica.

- acceptance of diversity in cultural and artistic expression
- fairness, equity, and inclusiveness of all stakeholders in the development and growth of craft
- commitment to a craft industry that supports social, economic, environmental and cultural sustainability
- encouragement of an environment of trust, networking, and collaboration and community growth and development
- support to craft production at consistently high standards related to product and service delivery
- promotion of innovation in craft design and production
- preservation of national interest, cultural integrity and the Jamaican brand

Main Policy Issues and Strategic Activities

The main issues to be addressed by the policy are:

- Strengthening and Expansion of the Value Chain for Craft (Input supply, Design and Innovation, Production, Wholesale, Retail and Consumption)
- Expanding collections and positioning based on culture and heritage and archiving, preservation and revival of traditional craft skills
- Supporting Viability and Sustainability of enterprises with appropriate Financing
- Environmental Sustainability
- Institutional Support, Sector Regulation and Governance
- Education, Training, Skills Enhancement and Capacity Building
- Increased linkages with agriculture, culture, mining, manufacturing, energy, tourism, ICT, and other economic sectors
- Robust Collection Development and Innovation in Authentic Jamaican products
- Enforcement of Intellectual Property Rights
- Consumer rights and protection
- Development and expansion of innovative marketing opportunities for Authentic Jamaican Craft.

Some of the major strategies proposed for sector development within the policy framework are:

- Creation under the auspices of MICAFA an inter-ministerial Craft Industry Council as a consultative resource to guide strategic and institutional support to the sector.
- Expand funding support to lead agencies which support the sector to expand Research and Development, Innovation, Collection Development, Incubation, Commercialization, and Market Expansion.

- Expansion of JBDC's craft development programmes offering training and capacity building to support product development, product quality, merchandising, customer service, business orientation and sustainability.
- Augmenting JBDC's existing assessment and rating tool for products and enterprises towards registering producers and rating their products
- Design, development and commercialization of new collections, in particular linked to culture and heritage
- Collaborate with partners to create interactive cultural experiences to support craft marketing e.g. community tourism, reorientation of craft markets to artisan villages and craft tours
- Conservation , archiving and promotion of traditional skills
- Development of minimum product, packaging and labelling and quality standards
- Branding and IP protection
- Support to production capacity building local and export marketing, development of craft tours
- Reorientation of craft markets to Artisan Villages

Policy Implementation

Feedback obtained from consultations indicates that stakeholders are strongly in favour of the establishment of a central coordinating body, in order to bring an appropriate level of oversight on issues affecting the sector's development. This is mainly due to the perception that past individual initiatives from various government sponsored and private agencies have been under-resourced and therefore met with limited and temporary success and it is felt that a more multi-pronged and focused approach by various agencies engaged under one umbrella group is now needed to position the sector for competitiveness.

In the short term, the Craft Industry Council should act quickly to develop and conclude inter-agency Memoranda of Understanding, outlining the roles and responsibilities of the key stakeholders named above in collaborating towards policy implementation. The Policy Implementation Plan includes a review of key stakeholders and roles as well as a monitoring and evaluation framework for further discussion and consultation. A list of organizations participating in consultations is shown in Appendix 2.

1. INTRODUCTION

1.1 Background

Craft production in Jamaica has traditionally been of both cultural and economic significance, a by-product of the rich cultural landscape of Jamaica and the legacy of the history and traditions of this Cultural Superstate. Since Independence, the Government of Jamaica has consistently recognized the importance of support for the conservation of the visual arts heritage of Jamaica and the development of the craft sector in Jamaica. This support is manifested in the development of institutions such as the former Things Jamaican, the National Gallery of Jamaica, the Institute of Jamaica, the Jamaica Cultural Development Commission, the Edna Manley College of the Visual and Performing Arts and the Jamaica Business Development Corporation. In recent times, several strategic planning processes spearheaded by the government have highlighted the importance of the craft sector and the need to move forward with action plans to ensure its further development. These include the 2002 Master Plan for Sustainable Tourism Development (Tourism Master Plan, the Tourism Sector Development Plan, part of Vision 2030 National Development Plan.

As a cultural industry sub-sector, craft is an important facet of Jamaica's tourism product and the overall visitor experience. Authentic Jamaican craft products developed using local skills and materials are important symbols of the national cultural identity and heritage and are therefore an essential component of what constitutes Brand Jamaica. The development of attractive product offerings appropriately presented has the potential to increase visitor spending and therefore indirect and direct exports of these products; increasing employment and the economic contribution of the sector. The organization of producer clusters within facilities which could present the opportunity for local tour activity and the development of attractive special purpose infrastructure, such as the Artisan Village concept seen in some countries, could create opportunities for further multiplier effects.

Currently, key stakeholders in the Jamaican craft sector are the suppliers of raw materials, individual craft producing enterprises, their producer communities, local galleries as well as gift, souvenir and retail shops. There are various segments in the market for craft, ranging from souvenirs to one-of-a kind- handmade objects and reflecting various price points in terms of potential visitor expenditure. There is little attention to the development of sustainable products within a value chain related to customer demand. Use of sustainable sources of raw material and greater use of reclaimable and recyclable materials in products and packaging to enhance environmental friendliness is a key concern, as is product quality and traceability. As is the case

for other cultural industries, the value chain for craft is defined by the elements of the Culture Cycle¹; comprising creation or conceptualization, making or production, dissemination/marketing/distribution and exhibition/reception/transmission, along with consumption/participation; which involves the element of the audience or general public using cultural products and participating in cultural experiences, including practicing as amateurs. The cycle is supported by education and archiving/ preservation as cross-cutting elements.² Many craft vendors are not producers and source from the same suppliers, locally or overseas. This results in overcrowded marketplaces with limited variation in product offerings that are increasingly less attractive to a potential visitor or resident seeking attractive and interesting souvenirs, unique visual art pieces or quality craft items for decorative or functional purposes. The potentially lucrative corporate gift market is also underserved. While major tourism entities provide some limited selling opportunities to a few craft vendors on an extended rotation basis on certain days/ nights, working in collaboration with the vendors associations, there is generally a disconnect between retail outlets in the tourism sector and producers of Authentic Jamaican craft. There is little interest on the part of accommodation investors and retailers in supporting locally made products, citing generally high price points and limited supply capability. Vendors feel locked out of the supply chain for visitor tours based on the high fees proposed by tour operators to promote the craft markets as destinations, while high levels of harassment and security perceptions also pose barriers to promotion and visitor engagement.

1.2 Policy Rationale

In the past few decades, there has been a decline in the application of traditional craft production skills in Jamaica, fuelled by the high levels of competition from imports as well as the aging population of master craftsmen and a general global shift away from labour intensive production to technology enabled industries. While craft production is still pursued as a component of technical and vocational subject areas in many schools, many young people do not view the pursuit of craft production as an attractive career. Within the marketplace, the packaging and presentation of Jamaican craft is not competitive with similar handmade or artisanal products made internationally and is therefore less attractive to the potential customer. In addition, there is the need to improve the atmosphere and environment of locations where craft is presented and sold.

Institutionally, there has been a fragmented approach to the sector's development, administration, management, training and marketing. Various aspects of the responsibility for development of the industry straddle several Ministries, Departments and Agencies; with no central body existing to coordinate the strategic developmental priorities and monitor the quality of the items produced and sold as authentic Jamaican craft.

¹ UNESCO (2009), 2009 UNESCO Framework for Cultural Statistics, p.20 , retrieved from <http://unesdoc.unesco.org/images/0019/001910/191061e.pdf>

² <http://www.unesco.org/new/en/culture/themes/cultural-diversity/cultural-expressions/programmes/global-alliance-for-cultural-diversity/culture-cycle/>

All the initiatives from the past have each contributed meaningfully to the support of the sector. Despite this, there is consensus that the sector lacks sustained organization for growth and development, competitiveness, ongoing capacity building focus, strategic development and sufficient dedicated institutional support; which are all hampered by significant environmental challenges that threaten the continued existence of the sector in its present form. Liberalized market conditions have also seemingly failed to support the visibility, growth and development of authentic Jamaican craft and visual art as icons of culture and heritage. In view of these situational and contextual realities, over time, various stakeholders have called for a policy to guide the sustainable development of the sector and the protection of local products and livelihoods. *The Growth-Inducement Strategy for Jamaica in the Short and Medium Term* (2012) requires the productive sector to place more emphasis on increasing foreign exchange and exporting more products.

A policy for the development of the craft industry has the potential to present clear guidelines for the development of authentic Jamaican craft to be used as traditional cultural expressions, artisanal decorative and functional objects, visual art for collectors, wearable art and fashion, souvenirs and trinkets. The development of quality craftsmanship skills has the potential to create additional opportunities in other economic areas such as construction and product design. The craft industry can be a potential lever to generate new economic opportunities and employment, while sustaining livelihoods and contributing to social cohesion. The articulation of a policy and related implementation strategies, based on stakeholder engagement, provides a focal point for the engagement of inter-agency collaboration to support the development of individuals, associations and communities toward common goals in the sector's development; while streamlining the allocation of human and financial resources to optimize their impact.

1.3 Purpose

The Policy aims to streamline the craft industry by facilitating incremental improvements in quality, variety, value, sales, customer satisfaction and profits. To this end, the Policy aims to promote greater local identity of finished craft and souvenirs, innovation, better packaging, regulation and production and distribution facilities.

1.4 Scope

The Craft Policy will address factors which are critical to the sustainability and growth of the craft industry in Jamaica, and which enable successful enterprise in the areas of craft, visual arts and souvenir products. It will also elaborate on strategic objectives from the sourcing of raw materials to the packaging and branding of an 'Authentic Jamaican' brand, to ensure that local craft producers and traditional artisans benefit from the marketing and commercial opportunities provided by the tourism industry.

2 DEFINITION OF KEY TERMS

2.1 Cultural/ Creative Industries

In the National Development Plan, Vision 2030, cultural capital includes, among other things, the manifestations of culture articulated through the full range of artistic and creative forms. Similarly the Creative Industries Sector Plan views cultural industries as

“..Involving the creation, production and commercialization of contents which are intangible and cultural in nature, which are typically protected by copyright, and which may take the form of goods or services. The range of cultural industries (sometimes also known as “creative industries”) includes printing, publishing and multimedia, audio-visual, phonographic and cinematographic productions, crafts and design, and also may be extended to include architecture, visual and performing arts, sports, manufacturing of musical instruments, advertising and cultural tourism.”³

2.2 Visual Arts

“Visual arts” are forms of expression that focus on the creation of works, which are intended to appeal to the sense of sight and can take many forms.⁴ Visual artists use various elements or material to express their feelings, emotions and differing perceptions of the world that surrounds them. The result of this work is judged mainly by the sense of sight.⁵ Painting, drawing, sculpture in various materials, printmaking, photography, plans, maps, performance art, installation art, mail art, assemblage art, body art, textile arts, fashion design, multimedia, video art, web design, web art, digital art, graphic and product design are some examples of visual arts⁶.

2.3 Fine Arts

A fine art is a visual expression considered to have been primarily created for aesthetic purposes, as distinct from “applied art”, which refers to expressions which also have some practical function. The term “fine art” is usually used in reference to art produced by someone who has studied the history, techniques, and strategies related to the processes used for its production, or someone who has completed significant formal study in the field. When applied to objects, the

³ Creative Industries Sector Plan

⁴ UNESCO-UIS (2009), UNESCO Framework for Cultural Statistics (FCS), UNESCO Institute for Statistics, p.26

⁵ (ITC, n.d) , Definitions, retrieved from

www.intracen.org/WorkArea/DownloadAsset.aspx?id=55508#sthash.t5pzIwRQ.dpuf

⁶ *Marketing Crafts and Visual Arts: The Role of Intellectual Property: A practical guide* Geneva: ITC/WIPO, 2003. xiii, p. 135

term “fine art” is typically associated with the professional disciplines of painting, sculpture, architecture, film, photography, conceptual art and printmaking. It may otherwise be associated with music and intangible culture.

2.4 Souvenirs

A souvenir is an object that is kept as a reminder of a person, place, or event⁷. It is an object that concretizes an intangible state into a tangible object, freezing a memorable past experience. The distinction is made in the literature between a ‘souvenir’ as a concrete reminder that is commercially produced and a ‘memento’, which is a non-purchased object that has a personal meaning.⁸ The value of a souvenir may be derived from the gift itself, the memory of the special occasion experience and/or the evidence of a particular status being attained in being able to purchase the object as part of having participated in the experience. The souvenir may be bought as a gift for the buyer him/herself or others, such as relatives, colleagues and friends.

2.5 Tourist Art

Tourist art refers to a specific category of souvenir; so named due to its nature as a memento of a tourist's trip or experience. Whereas traditional visual art maybe sought after by collectors and art enthusiasts, tourist art is sometimes viewed as lacking in cultural authenticity when compared with traditional art or cultural artisanal objects. This is mainly because the art is generated with a commercial motive and the anticipated taste of a tourist in mind. As a result, a tourist art piece may be less a reflection of authentic culture, than a reflection of that tourist's perspective or interpretation of an experience with the visited culture. A tourist art form may be a traditional expression that has appeal to consumers as being representative of the culture; or a non-traditional expression that originated for the purpose of sale to those outside the community.⁹ Despite the real or perceived issues with cultural authenticity, the potential economic value of tourism and the need for income among artisans has generated novel tourist art traditions all over the world, such as the Makonde wood carvings and ebony carvings from Benin, which eventually become part of popular memento offerings.¹⁰

2.6 Crafts or Artisanal products

The UNESCO Framework for Cultural Statistics (FCS) adopts the International Trade Centre (ITC) and UNESCO definition of crafts, or artisanal products, as

⁷ <http://oxforddictionaries.com/definition/english/souvenir>

⁸ Zulaikha, Ellya & Brereton, Margot (2011), Innovation strategies for developing the traditional souvenir craft industry, retrieved from <http://eprints.qut.edu.au/43468/>

⁹ Ryerson, Scott H., 1976, Seri Ironwood Carving: An Economic View, in *Ethnic and Tourist Arts: Cultural Expressions from the Fourth World*, Nelson H. H. Graburn, ed. Berkeley: University of California Press

¹⁰ Cultural Survival (n.d.), The Dynamics of Change in Tourist Arts, retrieved from <http://www.culturalsurvival.org/publications/cultural-survival-quarterly/australia/dynamics-change-tourist-arts>

*“those (products) produced by artisans, either completely by hand, or with the help of hand tools or even mechanical means, as long as the direct manual contribution of the artisan remains the most substantial component of the finished product. These are produced without restriction in terms of quantity and using raw materials from sustainable resources. The special nature of artisanal products derives from their distinctive features, which can be utilitarian, aesthetic, artistic, creative, culturally attached, decorative, functional, traditional, religiously and socially symbolic and significant”*¹¹ (UNESCO and ITC, 1997).¹²

2.7 Craftsmanship

The International Charter of Artistic Craftsmanship (2013)¹³ produced through the World Craft Council Europe, defines artistic handicraft objects as those which *“contribute to create the identity of a people”*, intended as collections of *“traditions, knowledge and distinctive marks that make them recognizable and unique”*, which are *“considered as an expression of the material culture, linked to the environment where the artistic phenomena and the art objects are manifested or produced”*. As such, objects of **artistic and traditional craftsmanship** must be considered as *“a people’s artworks, bearing a spiritual and cultural message, as well as being witness to traditions and creativity to be passed on to future generations”*. Within this context, works of artistic craftsmanship include:

- a) creations, production and works of high aesthetic value, whether inspired by forms, models, decoration, styles and techniques that are traditional or historical, or the result of individual creative development and of personal and artistic forms of expression;
- b) works which are mainly carried out using manual techniques, at highly professional technical level, using equipment, but excluding wholly mass-produced works; separate mechanized or automatic work stages are allowed, using innovative techniques and high-technology instruments.
- c) The definition of artistic craftsmanship also covers works of restoration, designed to conserve, consolidate or restore works of art, or objects of architectural, archaeological, ethnographic, bibliographic or archival heritage.

This definition is less rigid and more holistic; encompassing a wide range of handmade and artisanal works, however, it excludes objects that are wholly mass produced.

2.8 Artisans

Artisans may be defined as highly skilled craft workers who make products, which may be functional or decorative; but emphasize manual processes in their making. They may work individually, but can often be helped by family members, friends, apprentices or even a limited number of workers, with whom they are constantly in close personal contact. This contact

¹¹ (UNESCO and ITC, 1997) , definition adopted by the UNESCO/ITC Symposium "Crafts and the international market: trade and customs codification" - Manila, 6-8 October 1997), retrieved from http://portal.unesco.org/culture/en/ev.php-URL_ID=35418&URL_DO=DO_TOPIC&URL_SECTION=201.html

¹² UNESCO and International Trade Centre (ITC) (1997). Final report of the International Symposium on Crafts and the International Market: Trade and Customs Codification. Philippines, 6-8 October 1997

¹³ World Craft Council, <http://www.wcc-europe.org/resources>

generates a sense of community and attachment to the craft. According to the ITC, in order to include all business initiatives which contribute to the development of the sector, the use of the term ‘artisan’ will also cover those craft entrepreneurs who:

- Although not actively participating in production, specialize in research, market negotiations or product design and conception;
- Use machine tools or even machinery, without affecting the essentially hand-made nature of the work and the production process;
- Beyond the usual cottage or artisan unit, have associated in cooperatives or any other form of organization, formal or informal; and
- Manage or belong to micro- small or medium-sized enterprises concerned with artisanal production.¹⁴

At the regional level, CARICOM through the Council of Trade and Economic Development (COTED) at its 13th Meeting of Officials on the Free Movement of Skills and Facilitation of Travel approved the definition of ‘Artisan’ to be “a skilled tradesperson, craftsman or worker who has obtained a Caribbean Vocational Certificate, or an Approved National Vocational Certificate (NVQ)” The descriptors for artisans will be the same as those used by the ISCO-08 for Craft and Related Trade Workers and Plant and Machine Operators; and that the term Artisan should have the same meaning irrespective of whether the CVQ holder is a wage earner or non-wage earner¹⁵. Appendix 1 shows a list of craft and artisanal occupations aligned with the ISCO-08, produced by the International Labour Organisation.

2.9 Artist and Craft Producer

The terms ‘artisan’ and ‘craft producer’ are often used interchangeably, although the term artisan emphasizes elements of skill and manual production. The International Trade Centre (ITC) proposes that the five characteristics below broadly apply to a wide range of world's crafts:

- They are produced by artisans, either completely by hand or with the help of hand-tools and even mechanical means, as long as the direct manual contribution of the artisan remains the most substantial component of the finished product.
- There is no particular restriction in terms of production quantity.
- Even when artisans make quantities of the same design, no two pieces are ever exactly alike.
- They are made from sustainably produced raw materials.
- Their special nature derives from their distinctive features, which can be utilitarian, aesthetic, artistic, creative, culturally attached, decorative, functional, traditional, and religiously and socially symbolic and significant.

2.10 Authentic Jamaican Craft

¹⁴ Marketing Crafts and Visual Arts: The Role of Intellectual Property: A practical guide Geneva: ITC/WIPO, 2003. xiii, 135 p.

¹⁵ Draft Report of the Thirty-Sixth Meeting of the Council for Trade and Economic Development (COTED), Georgetown, Guyana, 29 April -3 May 2013

The concept of authenticity in craft is a complex notion, based on the nature of creativity as a by-product of the cross-fertilization of ideas, influences and experiences. In the case of souvenirs, Zulaikha, Ellya & Brereton, Margot (2011) state that “a souvenir should symbolize the place visited”. Based on a literature review of research in relation to tourist demands for souvenirs, they propose that the relationship of souvenir to the local area and authenticity were the most important product attributes that motivate purchasing. These demand factors also have implications for souvenirs sold in Jamaica, which are very often imported from foreign cultures, with no relationship to the local context. The researchers propose that when selection factors are introduced to determine authenticity in craft souvenirs, “authenticity”, according to the tourists studied, was defined as a craft’s “*uniqueness, workmanship, aesthetics and use, cultural and historical integrity, and genuineness*”. The research concludes that authenticity is supposed to be a distinct feature linked to place, event or experience that cannot be found elsewhere. Writing on the issue of positioning traditional Malian textiles called Bogolan (or mud-cloth), within tourist art markets, Rovine (2008) concludes that the same object may be viewed as authentic in some contexts and inauthentic in others.¹⁶

The African Caribbean Institute of Jamaica/ Jamaica Memory bank, in a brochure on Jamaica’s Intangible Cultural Heritage, states that Jamaica’s traditional craft include pottery, woodcarving, straw work, needlework, crochet, costume jewellery, pewter work and tin-smithing. These traditional craft represent areas where skills have been passed down through generations that have kept the skills alive. Contemporary Jamaican artisanal/ craft products include including alabaster, aromatherapy body products and candles, basketry and weaving, ceramics and pottery, costume jewellery and accessories, crotchet, knitting and embroidery, fibre-based products, leather ware, recycled materials, textiles and wood products, among others.

During 2013, the Jamaica Intellectual Property Office (JIPO), Edna Manley College of the Visual and Performing Arts (EMC), and the Ministry of Tourism (MT) made the decision to host a design competition geared towards raising the quality and diversity of craft available in specially designated craft areas and introducing an Authentic Jamaica brand reflective of high quality, time honoured traditions of craftsmanship as well as sustainability. The Ministry of Tourism registered the Authentic Jamaica™ trade mark in twenty-eight (28) classes, including 3 services categories and filed Regulations for use with the Jamaica Intellectual Property Office. The eligibility of products to be designated “authentic Jamaican” was based on the criteria of a mandatory proportion of at least 70% of the cost of production being incurred in Jamaica; reflecting “a significant change” of any imported material that is not available and not produced in Jamaica”. Other registered intellectual property marks reflecting the authentic Jamaican goal are shown in Table 1 below.

For the purposes of the National Craft Policy and Strategy of Jamaica, ‘*Authentic Jamaican craft*’ will be defined as “*any traditional cultural expression, contemporary cultural expression,*

¹⁶ Rovine, V. (2008), *Bogolan: shaping culture through cloth in contemporary Mali*, Indiana University Press, p.30

artisanal product, visual art, fine art, souvenir or craftsmanship-based design, which satisfies the following criteria.” It is:

- made or assembled in Jamaica utilizing manual or mechanical techniques, in respect of which the direct manual contribution of the artisan remains the most substantial component of the finished product; and
- made or assembled by Jamaican citizen or registered Jamaican company, and
- meets existing national quality standards or new standards established based on stakeholder consultations, and
- comprised of raw material components originating solely from Jamaica and used in a natural, modified or semi-processed state as an input to production; or utilizes at least 51% Jamaican raw material, or
- if the principal raw material is not made in Jamaica, has at least 70% local input. Local input is defined by the value of production that is incurred in Jamaica which includes “a significant change” of any imported material that is not available and not produced in Jamaica.

Table 1: JIPO Registrar of Trade Marks and defining criteria

Proprietor/ Trade mark	Registered Categories	Places Registered	Attributes of Mark
Jamaica Exporters Association and The Competitiveness Company (TCC)/ 4 Collective Marks	Boutique Agribusiness Fresh Produce Visual Arts Wearable Art	USA, Europe	Goods which are of Jamaican origin and have been manufactured in Jamaica outlined in Jamaica Certification programme covering particular good to ensure it's safe, unadulterated, or premium quality and authentically Jamaican
JAMPRO / Brand Jamaica 5 registered Marks	15 classes for goods and services including advertising, business management, insurance, financial affairs, telecoms, transport, packaging and storage of goods, education, entertainment, sporting and cultural activities, food and accommodation services, medical, cosmetic, agriculture, horticulture, and forestry services		
Bureau of Standards /Jamaica Made Certification Mark	45 classes Protected under Standards Act of 1969		Jamaica raw material components originating solely from Jamaica used in natural, modified or semi-processed state as an input to production Only products utilizing at least 51% Jamaican raw material, or if the principal raw material is not made in Jamaica, which have at least 70% local input ¹⁷ and which have been produced in keeping with the relevant specifications and checked for quality assurance, are eligible.
JBDC Things Jamaican Jah Mek Yah Born Yah Product Spa Jamaica Jamaica Harvest Irie Magic	Store and umbrella brand; multi-product category 22 classes		Authentic Jamaica -Production in Jamaica utilizing manual or mechanical techniques -Produced by Jamaican citizen or company -Meets national quality standard -Has consistent quality and supply

Source: Ministry of Tourism / JIPO

¹⁷ At least 70% of the cost of production must be incurred in Jamaica which includes “a significant change” of any imported material that is not available and not produced in Jamaica.

3. SITUATIONAL ANALYSIS

3.1 *Craft Development in Jamaica: Major Government-led Support Measures to date*

Production of craft in Jamaica dates back to the subsistence production of implements for use in daily life by Arawak populations and later by enslaved Africans during the era of plantation slavery. The Institute of Jamaica confirms that these skills were not necessarily learned on the plantation, but rather taken by Africans with them when they were uprooted from regions of the Gold and Slave Coast in West and West Central Africa during the period of the Trans-Atlantic Trade in Africans (16th- 19th Centuries).¹⁸ As a result, many of the techniques associated with traditional craft were retained and passed from generation to generation. In 2014, the Portland based Charles Town Maroons received a UNESCO Award of Excellence for Handicraft. This award encourages artisans to produce handicrafts using traditional skills, patterns and themes in an innovative way, in order to ensure the continuity and sustainability of these traditions and skills. The Bench Drum, a standalone musical object, crafted from local woods and goat skin that references the use of the drum in spiritual rituals calling on the African ancestors was selected for an award based on “its craftsmanship and cultural content”.¹⁹

In the present day, there is evidence of cultural retention and continuity of African traditions in wood carving and straw work produced locally. There is also some remaining evidence of specific types of product, mainly in the case of wood, clay and straw products, being identified with communities where these materials can be found in Portland, St. Elizabeth, and St. Catherine. “Thus St. Elizabeth, where thatch grows abundantly, is closely identified with basket craft. Similarly, the Maroons in Portland have been using thatch since the 17th century. The relative abundance of the raw material, jippi-jappa palm, in the John Crow Mountains has favoured the development of jippi-jappa weaving as a popular handicraft in the area” (McHardy, 2008)²⁰.

Despite the survival of craft traditions, the absence of an era of industrialization in Jamaica has limited the indigenous craft production capacity when compared with imports from foreign countries. Countries which have emerged from a period of industrialization have gained the necessary learning to transition from a manufacturing culture led mainly by assembly of inputs, to one based on leveraging design, creativity and innovation, Researcher Wolfe-Wilson (2010) identified that preferred Jamaican craft materials include “wood, straw, cloth, clay, beads and shells, with limited use of leather and copper. Articles marketed are mainly “wood carvings,

¹⁸ Institute of Jamaica (2015), Safeguarding Traditional Craft in Jamaica, Jamaica Journal, Vol, 35, no.3

¹⁹ Pride Magazine (2014), *Maroon Group Wins UNESCO Award of Excellence for Handicraft*, retrieved from https://www.google.com/search?q=UNESCO+Handicraft+Prize+%2B+bench+drum&rls=com.microsoft:en-US:IE-Address&ie=UTF-8&oe=UTF-8&sourceid=ie7&rlz=117ADRA_enJM400&gws_rd=ssl

²⁰McHardy P.(2008), *Developing and Promoting Craft as a Tourism Product Offering*, Tourism Product Development Company (TPDCo)

ceramics, sandals, clothing, jewellery and basketry.” She provides an illustration of the changing context of craft production, noting that some makers

“...are confronting the established definitions, traditions and critical frameworks of Jamaican craft making techniques, while reinterpreting them within a global context. They are developing and refining their products by using new technologies and processes and marketing them, through the Internet, while retaining their sense of cultural identity as Jamaicans and Caribbean people (whether or not they are actually based in Jamaica)”.²¹

By contrast, she states that most craft activity within Jamaica is “repetitive, poor in quality and derivative; producing mainly souvenirs for tourists”. As a roadmap to support sector development, a national policy for craft in Jamaica must take account of traditional as well as contemporary cultural expressions and aim to encourage design, creativity and innovation.

In 1879, the Institute of Jamaica (IOJ) was established by Sir Anthony Musgrave, then Governor of Jamaica, for the encouragement of literature, science and art in Jamaica, as a government agency tasked with the promotion and preservation of culture in the island. Today, IOJ is a Division of the Ministry of Youth and Culture and it is the country's most significant cultural, artistic and scientific organization as a patron and promoter of the arts in Jamaica, sponsoring exhibitions and awards. It is also the country's museums authority, as well as administering other national arts and cultural outlets including the National Gallery of Jamaica, the African Caribbean Institute of Jamaica, and the Jamaica Journal Magazine. The museum collections include historical craft artefacts and the IOJ has, at times, been involved in a waning skills programme, that seeks to preserve traditional craft-related skills such as candy making, tating, pottery making and caning. The IOJ has indicated that it has a wide variety of artefacts in its collection that could be reproduced as craft/art items. These include drums, boxes and many other objects and it would be in the IOJ's interest to host artisans/artists to view its collection to see what objects could be replicated for sale.

In 1950, the Jamaica School of Art and Craft was founded by the Honourable Edna Manley O.M., a sculptor and wife of the former Prime Minister of Jamaica, the Right Excellent Norman Manley QC. The formation of the school ushered in a new era of cultural confidence and recognition of the potential for professional development of the field of visual arts locally. In 1966, the Jamaica School of Art and Craft was renamed the Jamaica School of Art and in 1976, four existing schools established for the study of the arts (through music, drama, dance and visual art) were brought together under the Institute of Jamaica on a new campus at 1 Arthur Wint Drive, to form the Cultural Training Centre; a dynamic cultural and creative space for the development of Caribbean arts. In 1995, an Act of Parliament redefined the Cultural Training Centre, conferred tertiary education institution status under the Ministry of Education and officially renamed it as the Edna Manley College of the Visual and Performing Arts. Today, the

²¹ Wolfe Wilson, S. (2010), Towards Sustainable Craft Production in Jamaica, The Journal of Modern Craft, Volume 3- Issue 2- July 2010. pp.195

College is recognized as the premier arts tertiary institution in the Anglophone Caribbean, having made a substantial contribution to the professionalization of visual arts in Jamaica and the Caribbean region. As education everywhere faces challenges to remain relevant in the face of alternative offerings promoted via the internet, the lack of sufficient creative firms to provide post-graduation employment opportunities and the need for greater creative entrepreneurship, the institution is increasingly focused on the value of a tertiary experience to prospective students, as well as the role which the arts and the college can play in national, regional and global development.

Craft Things Jamaica Limited, otherwise known as Things Jamaican (TJL), was established in 1968 under the ministerial portfolio for Development and Welfare, with the assistance of the United Nations Development Programme (UNDP) and the International Labour Organization (ILO). This followed the creation of the 100 Villages programme set up by the government and operated through the Social Development Commission. TJL was conceived as a programme with the core values of community level training to develop craft as a means of earning a decent living and the corporate body was established as a company formed to help in the marketing of the products made in those village centres. From the outset, the objectives of TJL were:

- the reorganization of craft development operations in Jamaica
- the promotion of craft work through research, production and marketing of craft goods with Jamaican characteristics (product development and improvement in design)
- to be the principal training organization for craft in Jamaica, producing skilled and certified craft workers
- providing persons in the business of manufacturing or dealing in craft goods with assistance in all areas of acquiring financing, designs, material and other facilities for manufacturing, information and advice on techniques of production and on the identification of markets
- to assume the responsibility of training persons in the skills of craft goods manufacture
- to promote Jamaican craft locally and overseas (building of a distinctive Jamaican brand)
- to assume a role in rural development
- to provide of a better quality of craft and gift item for the visitor to Jamaica
- to operate as a commercially-oriented enterprise
- to keep in close touch with the market in which the products of small, independent craft units and individuals were sold; keep artisan and public in touch through exhibitions and craft fairs and ensure that items are of the highest quality.

Headquarters were located at Bumper Hall in St. Andrew, where a total of six production units comprising 35,000 square feet with considerable room for expansion were constructed. At various times, production was undertaken through these facilities of ceramics, pewter, woodworking, weaving, machine embroideries, leather and straw work. The integrated factory complex also contained a wood drying kiln, food packaging units and a lumber yard. The company also supported private producers by purchasing their surplus for re-sale through its own

outlets; providing a sort of guaranteed market for products. Teachers of craft from the villages were trained at Bumper Hall so that they could return to their villages as trainers. TJJ through its training programmes established a grading system for craft producers. The assessment system, juried by persons proficient in the craft, rated each item from one to five stars, certifying the producer according to these ratings. Only producers with a 3 to 5 star rating were allowed to supply goods to Things Jamaican. Those unable to meet the rigid testing standard were provided with access to training, field services and product development. Products were showcased and sold through retail shops established at both international airports and at the Kingston Craft Market. Later, the Devon House Complex became the main promotional point. At the height of its operation, the Bumper Hall factory and its associated out-stations were employing 950 persons (McHardy, 2008).

During 1978 to 1981, TJJ was reorganized into the National Institute of Craft Limited (INCRAFT). Emphasis was on creating a large number of small labour intensive projects and encouraging craft producers to form cooperatives. In 1985, the commercial operation of Bumper Hall was phased out. TJJ was reorganized as a promotional agency engaged in product development, extension work, information services and the provision of technical know-how and training.

TJJ ceased operations in 1982 when the HEART/ National Training Agency (NTA), came into existence. HEART/NTA took over the functions of TJJ and ran the TJJ training programmes up until 1996. In that year HEART/NTA ceased operations at Bumper Hall and since then the factory and equipment have been laying idle (McHardy, 2008). There are two ways in which craft producers may receive training from the HEART/NTA, through the vocational training programmes within its academies and through community based training. In the area of craft training, the Community-Based Training Department has completed community training in machine embroidery, leather craft, batik, and hand lace. With regard to the hand lace project, community members in Mandeville approached HEART indicating that it was a dying skill and there was only one person in the community, who had been taught by her mother, able to make hand lace. The Department also maintains a list of producers who have awarded ratings between 3 and 5 stars by TJJ and utilizes these persons as trainers in their community-based training programmes. More recently, there have also been attempts to introduce glass bead making, building capacity with the support of an expert trainer from Ghana. It does appear that with the closure of TJJ, a specific institutional focus on developing craft skills through ongoing training and an integrated approach to craft sector development which spans the entire value chain has been lost in Jamaica.

The Jamaica Business Development Corporation (JBDC), an agency of the Ministry of Industry, Commerce, Agriculture & Fisheries (MICAF) assumed responsibility for the Things Jamaican brand, and the operation of TJJ retail outlets at the International Airports and at Devon House in 2001. As the government agency responsible for micro and small business development, JBDC provides development support to creative industry enterprises including designers and artisans in the craft industry from concept to market. Items are sold through its Things Jamaican retail stores

and online and the organization produces pop-up shops and events, some of which are in collaboration with other ministries and agencies such as the Christmas in July Corporate Gift Showcase in partnership with the Ministry of Tourism. The Corporation has established an incubator Resource Centre at Marcus Garvey Drive in Kingston, to offer support to producers in product and collection design and development, branding, packaging development, furniture design, jewellery production and artisanal food processing. JBDC also owns a series of sub-brands which supports the marketing of collections and products from MSMEs which may be too small to enter the market independently but which are provided with an important platform for visibility and income generation to support their development and growth. JBDC has initiated several cluster development programmes island-wide, a significant number of which have been focused on the craft industry. These initiatives which continue in concert with other agencies such as the Bureau of Standards Jamaica and TPDCo as well as international agencies including Commonwealth Secretariat and UNDP, have also included new product development with new materials such as bamboo fibre among others.

The Bureau of Standards Jamaica (BSJ) has also been active in supporting the development of the craft sector. The BSJ has adopted a CARICOM Code of Practice for the manufacture of wooden products, which provides a voluntary product quality standard. Through its Special Projects Unit, the BSJ has developed a Bamboo Project to achieve the mass production and commercialization of bamboo products by leveraging the development and utilization of certification systems to be spearheaded by the International Network for Bamboo and Rattan (INBAR) Focal Point at the BSJ. Based on its membership in INBAR since January 2012, the Bureau of Standards was able to bring together a range of technical and commercial stakeholders to form the Bamboo and Indigenous Materials Advisory Committee (BIMAC). Members of BIMAC have used Jamaican *Bambusa vulgaris* species to develop prototypes of building materials, furniture, souvenir items, utensils and charcoal. Members of BIMAC have also formed a non-profit organization called the Ultimate Bamboo Foundation which has been registered and has as its mission the replication of the successes of BIMAC in order to provide employment throughout Jamaica. The bamboo project has been able to obtain technical assistance and funding support from the Chinese government, the Organization of American States and other stakeholders towards the project goals of skills training and employment through commercialization of indigenous resources.

The Tourism Product Development Company (TPDCo) has traditionally facilitated craft development through its training programmes for craft vendors and, including Team Jamaica training. This specialized training for craft traders includes history, knowledge in tourism, geography, environmental awareness, self-development and customer service. Approximately 5,000 persons receive Team Jamaica training annually²². TPDCo also manages a system of licensing administered by the Jamaica Tourist Board (JTB) which provides craft trader permits, consistent with the legal requirements related to offering craft for sale in resort areas.

²² McHardy P.(2008), Developing and Promoting Craft as a Tourism Product Offering, Tourism Product Development Company (TPDCo)

Other key agencies involved in the craft sector include the existing craft associations, as well as community groups and producers aligned with the Rural Agricultural Development Agency (RADA), the 4H Clubs and the Social Development Commission. It should be noted that during the early development of the Jamaica Cultural Development Commission (JCDC), the entity focused extensively on the cottage industry, which includes various elements of craft production. JCDC is now moving towards revamping its focus on promotion and development of the sector, which will need to be done in close partnership with the Jamaica Business Development Corporation (JBDC).

Institutionally, there has been a fragmented approach to the sector's development and administration. Various aspects of the responsibility for development of the industry straddle several Ministries, Departments and Agencies, with no central body existing to coordinate the strategic developmental priorities and monitor the quality of the items produced and sold as authentic Jamaican craft. Table 2 below provides an overview of the role of these MDAs in the development of the craft sector.

Table 2: Government Institutions with mandates relevant to the Craft Sector		
MINISTRY	AGENCY	MANDATES PERTAINING TO THE CRAFT SECTOR
Ministry of Industry, Commerce, Agriculture and Fisheries	Jamaica Business Development Corporation/	Facilitates the development of Micro, Small and Medium Enterprises (MSMEs) Leads cluster development activities for the Creative Industries, including Craft Has developed and supported clusters for Gifts and Craft, Fashion and others Provides marketing and retailing services offered through the Things Jamaican branded chain of stores and on e-commerce platform Provides guidance on craft product design and development. Offers physical space for the development of prototypes and production through Craft Incubators.
	Jamaica Intellectual Property Office (JIPO)	Facilitates the registration and IP protection of original creative works, designs, trade marks, geographic indications, traditional knowledge and traditional cultural expressions; provides advice and education on the role of Intellectual Property Rights (IPRs) in the protection of original creative works
	Bureau of Standards Jamaica	Establishment of product standards
	JAMPRO	Promotion of exports and investments
Ministry of Science, Technology, Energy and Mining	Scientific Research Council of Jamaica	Conducts Scientific Research on raw materials for craft and natural products
Ministry of Culture, Gender, Entertainment and Sport	Institute of Jamaica	For the encouragement of science, literature and art
	National Gallery of Jamaica	Conservation of Jamaican visual art and preservation of the national collection
	Jamaica Cultural Development Commission	Facilitates the preservation, reviving and retention of traditional handicraft through the national festival programme
Ministry of Tourism	Jamaica Tourist Board	Licenses craft vendors
	Tourism Product Development Company Limited	Provides customer service Training to craft vendors; Conducts infrastructural improvements, refurbishing and rehabilitation on craft markets
Office of the Prime Minister	Tourism Enhancement Fund	Providing funds for physical infrastructure upgrading of the craft markets
Ministry of Local Government	Parish Councils	Licenses trades and businesses, licenses vendors and designates areas for vending; Owns and Manages Craft Markets. Initiator, facilitator, co-ordinator and mobilizer for local economic development on a consistent national basis.
	Social Development Commission	Supports local economic development initiative within communities Mobilizes targeted community groups for community development.
Ministry of Education	Edna Manley College for the Visual and Performing Arts	Provides tertiary training for artists

	HEART	Provides, competence assessment and certification of artisans. Their community-based Training Department provides community training in machine embroidery, leather craft, batik, and hand lace.
	National Council on Technical Vocational Education and Training (NCTVET)	Ensures that NCTVET programmes adhere to national quality standards through its Accreditation Programme
Office of the Prime Minister	Urban Development Corporation	Owens and manages Craft Markets
	National Cultural and Creative Industries Commission	National Creative Economy Policy and Master Plan for Sustainable Development
	Protocol Section	Responsibility for the protection and authorization is use of national symbols
Ministry of Finance and Planning	Jamaica Customs	Protection of Jamaica's borders against illicit imports and the facilitation of trade; detecting and apprehending persons engaged in fraudulent practices designed to circumvent customs and trade related laws
Source: Compiled by the Ministry of Tourism (revised by MICAF)		

In 2007 a Craft Industry Council was established, chaired by the Jamaica Business Development Centre (JBDC). The mandate of this Council was to rejuvenate the craft sector and to encourage the use of indigenous raw materials to create new designs. Local Craft Development Councils were also formed which spoke to direct challenges or issues at the parish level. Presidents and officers were selected at both levels. Initially, attendance was in high numbers and there was much support. The TPDCo was designated as the secretariat and several meetings were convened both at the National level as well as the local level. Several plans and proposals were made; however, there was no source of funding identified at the time. Over time, the motivation was lost as the Council Members became disenchanted and the council meetings essentially became viewed as 'talk shops'.

Over time, several short-term project initiatives have been implemented to support the development of craft producers and artisans in communities, with a view to contributing to sustainability of the sector. This includes the development of an Authentic Gift and Craft Cluster, supported by the Private Sector Development Programme with a budget of J\$20 million applied over two years. In 2013, the Jamaica Intellectual Property Office (JIPO), Edna Manley College of the Visual and Performing Arts (EMC), and the Ministry of Tourism (MOT) hosted a design competition for the craft industry to sensitize the public on the value and importance of intellectual property protection and exploitation, raise the quality and diversity of craft available in specially designated craft areas and spearhead the development of an Authentic Jamaica brand that will signify high quality, tradition of craftsmanship as well as sustainability. A total of 118 original entries were received and evaluated against specific rules-based criteria. Despite the lack of follow on activity in terms of commercialization, the competition was widely viewed as successful, by producers as well as host agencies.

All the initiatives from the past have each contributed meaningfully to the support of the sector. Despite this, there is consensus that the sector lacks sustained organization for growth and development, which is hampered by significant environmental challenges that threaten the continued existence of the sector in its present form. Liberalized market conditions have also seemingly failed to support the visibility, growth and development of authentic Jamaican craft and visual art as icons of culture and heritage. In view of these situational and contextual

realities, over time, various stakeholders have called for a policy to guide the sustainable development of the sector and the protection of local products and livelihoods. *The Growth-Inducement Strategy for Jamaica in the Short and Medium Term* (2012) requires the productive sector to place more emphasis on increasing foreign exchange and exporting more products. The tourism sector's role in this scenario is to increase the average expenditures of tourists while boosting total visitor numbers. The Craft Policy will help to fulfil this objective.

3.2 Profile of the Jamaican Craft Sector

3.2.1 Contribution of the Craft Sector to the Jamaican Economy

Globally, the Creative Economy has been cited as one of the strongest drivers of development. Statistics published by UNCTAD in May 2015 show that the world trade of creative goods and services totalled a record US\$547 billion in 2012, as compared to \$302 billion in 2003; with an average annual growth rate of 8.8% among all countries considered. Developing country exports of creative goods were even stronger, averaging 12.1% annually over the same period.²³

Jamaica's statistical framework does not currently capture the contribution of the craft sector to GDP. In addition, significant amounts of transactions related to craft production and sale are within the informal sector. The National Cultural and Creative Industries Commission estimates that 53% of Jamaicans operate within the formal economy and as much as 30% of the productive sector may be creatives who remain "uncounted and less-counted" in official statistics.²⁴

3.2.2 Employment

Based on the projected size of the informal economy in craft, precise data on employment is not available. However, Table 3 below shows data extracted from STATIN. The data indicates that employment in formal establishments of craft-related trades and production was at 9943 in 2013, declining marginally by about 1% from 10054 in 2010.

As shown in Table 4 below, an estimated 1983 self-employed craft traders operate within the 15 resort area craft sites across Jamaica, as of November 2015.

Employment related to the craft sector is also created through the sale of craft gifts and souvenir in retail outlets. The exact number of outlets and the number employed are unknown; however, there are 207 in-bond shops in operation in 2015, only some of which are involved in the sale of craft gifts and souvenirs. As shown in Table 5 below, there has been a significant increase in the number of licensed in-bond retailers in the past five years since 2010.

²³ United Nations/ UNDP/ UNESCO (2013), Creative Economy Report 2013 Special Edition: Widening Local Development Pathways, p.10

²⁴ Hickling D. (2014), Presentation on Creating an Enabling Environment for Jamaican Creatives and Creative Economy, National Cultural and Creative Industries Commission

Table 3: Annual averages of all employees in large establishments				
	2010	2011	2012	2013
ALL SECTORS	172,496	171,216	170,590	173,024
TOTAL MANUFACTURING	40,253	39,909	40,267	40,578
TOTAL RETAIL TRADE	22,880	23,399	22,564	22,730
Textiles	170	172	163	176
Wearing Apparel	5,384	5,168	5,268	5,206
Leather & Leather Products And Footwear	79	68	65	65
TOTAL TEXTILES, WEARING APPAREL, LEATHER AND FOOTWEAR	5,634	5,407	5,497	5,447
Wood & Cork Products (Other than Furniture)	610	581	574	545
Furniture	1,553	1,574	1,656	1,691
TOTAL WOOD & WOOD PRODUCTS	2,163	2,155	2,230	2,236
Earthenware, Glass And Glass Products	24	24	24	24
BASIC METAL AND FABRICATED METAL PRODUCTS, MACHINERY AND EQUIPMENT	2,233	2,119	2,196	2,236
Total Craft-related trades and production	10,054	9,705	9,947	9,943
Source: Statistical Institute of Jamaica (STATIN) Release date: 30/05/2014				

Table 4: Summary of Craft sites and vendors			
Resort Area	Number of craft sites	Craft shops/ stalls per market	Total craft traders
Kingston	1	123	140
Port Antonio	1	23	27
Ocho Rios	5	617	917
Montego Bay	5	479	639
Negril	3	195	260
TOTAL	15	1437	1983
Source: Tourism Product Development Company Limited (TPDCo), November 2015			

Table 5: In-bond Stores by Region		
Region	2010*	2015
Kingston & South Coast	12	10
Falmouth	Not given	2
Montego Bay	3	97
Negril	16	28
Ocho Rios	65	68
Port Antonio	1	2
Total	97	207
Source: TPDCO		
* Source: Ministry of Tourism (2011), Assessment of the Economic Impact of the		

3.2.3 Tourist Expenditure on Craft Items

On average, 8.4% of total visitor expenditure of just over US\$122 per person per night is allocated to shopping by stopover visitors.²⁵ Spending is slightly higher in the winter season, perhaps due to the festive season. This means that stopover visitors spend about US\$10.25 on average on all shopping, including any craft purchases, per night. Table 6 below shows the breakdown of expenditure by cruise passengers. Expenditure on straw products, wooden articles, clothing and other shopping, amount to 11.7% of overall average expenditure per night of US\$82.13 or about US\$9.61 per night.

Average Expenditure per person per night	US\$82.13
Item	Average annual % of total expenditure
In-bond	20.1
Coffee	2.6
Clothing	3.6
Spices	1.2
Spirits (Alcohol)	5.3
Straw products	1.0
Wooden Articles	5.5
Other Shopping	1.6
Source: JTB Annual Travel Statistics 2014	

3.2.4 Potential market size

The size of the local market for craft products is not known, however, the annual import of craft and artisanal products is indicative of the potential demand. The five year data for Jamaica's import of craft and artisanal products is shown in Table 7 below.

YEAR	2008	2009	2010	2011	2012
All Creative Goods	304.9946	149.1861	168.616	151.079	145.5204
Art Crafts	5.278884	3.940953	3.662316	3.979754	4.280227
Wicker ware	0.326599	0.291019	0.296257	0.194712	0.243164
Design	84.99455	64.37757	67.84201	73.29672	82.45777
Fashion	8.808913	7.15815	7.998208	7.496134	8.308483

²⁵ JTB Annual Travel Statistics 2014

Interior	45.54237	31.36575	29.28775	25.03845	30.26719
Jewellery	25.76291	22.26274	27.08696	36.82581	39.5606
Visual Arts	2.565232	1.253314	1.437772	1.760436	2.69404
Paintings	0.312062	0.192198	0.132761	0.319913	1.150902
Photography	0.388268	0.155719	0.088658	0.20259	0.23288
Sculpture	1.807089	0.898534	1.201716	1.208619	1.309696
Source: UNCTADSTAT Creative Economy Database					

In 2012, Jamaica's imports of art crafts amounted to US\$4.28 million, increasing over the two previous years. Imports of design goods including fashion, interior accessories and jewellery, as well as other product categories not shown, amounted to US\$82.45m. Imports of visual arts, including paintings, photography, sculpture and other categories were valued at US\$2.69 million.

3.2.5 Developing a profile of Jamaican craft producers

A mini-survey of Jamaican craft producers was conducted between August and September 2015 to support policy development. Participants included representatives of newer businesses in the sector, operating for less than 5 years as well as more established businesses. The majority of producers expressed that they had been plying their trade in the craft sector for more than 20 years. In some cases, participants volunteered that the business had been handed down from the previous generation through the family. The majority of participants derived more than 75% of income from craft production, while forty-five percent (45%) of respondents were completely dependent on craft sales for their livelihood. Thirty percent of respondents indicated that craft production was a seasonal undertaking. Seventy percent (70%) of survey respondents were micro businesses; either sole traders or individual artisans. The gender distribution of ownership in sole trader businesses was 64% male to 36% female, for the small sample.

All of the producers within the survey sample utilized local raw material, while 20% of respondents also used imported raw materials. The majority of producers offered a mix of products to appeal to potential customers. Wooden products and visual art products comprising paintings, framed art and sculptures were the most popular items sold, followed by souvenirs. Forty percent (40%) of survey participants claimed experience in exporting products and seventy percent (70%) of respondents indicated that they were interested in export for the potential hard currency earnings and the expanded prospects for new markets and customers. Craft products are mainly sold direct to the customer in person and at least fifteen percent (15%) of producers target the tourist market for sales.

Most Jamaican craft is sold in the region of J\$7500 or less. This equates to approximately US\$65.00 at an exchange rate of J\$115.00 to one US\$. Most survey respondents indicated several ranges of price points, intended to capture more customers. Forty five percent (45%) of respondents are able to provide a product offering in the range of J\$1500 (US\$13 or less). Eighty percent (80%) of producers claimed estimated monthly sales of less than J\$100,000 per month. Forty percent (40%) of respondents indicated sales between J\$20,000 and J\$50000.

Further research in the form of a more comprehensive mapping exercise to identify the nature of products being produced locally, existing production capabilities and geographic location of potential clusters, pricing and sourcing of inputs is required. The development of databases to identify and provide ratings for craft producers by skills/competency and identification of potential buyers is also a key contribution to the streamlining the sector and creating markets for local production.

3.3 *SWOT Analysis of the Jamaican Craft Sector*

A SWOT (strengths, weaknesses, opportunities and threats) analysis provides a summary overview of internal strengths and weaknesses and threats and opportunities that may be external to the industry.

3.3.1 *Strengths of the sector*

- Jamaican craft has strong cultural roots, demonstrates good craftsmanship and creative expression
- In some cases, craft production and sale has been handed down as an economic and social activity through generations of a family. This inter-generational element is valuable in the context of retention of skills and elements of intangible cultural heritage
- There are a few dedicated producer associations, such as the Association of Jamaican Potters (AJP) and established Craft Vendors' Associations with reasonable influence, some of which represent both vendors and producers
- There are high levels of interest and stakeholder buy-in for change to support further development of the craft sector, including among government institutions, producers and vendors and successive government programmes have consistently recognized the cultural and social significance of the sector.
- Existence of training and capacity building institutions
- Sector is dominated by micro-businesses with flexibility in production

3.3.2 *Weaknesses*

- Gaps in knowledge and information about the sector; data on the craft sector is limited and needs to be disaggregated to facilitate planning
- There is a lack of appreciation of the craft industry as a business sector offering numerous possibilities and vast potential to several players along the value chain to create viable, growth oriented enterprises. This results in a lack of sufficient resources being allocated to lead agencies for craft industry development as well as affordable financing, grants and other important forms of support being created specifically for stakeholders along the industry value chain.
- There is need for Jamaican craft to have a more recognizable or pronounced cultural representation and identity in order to be appealing to customers, competitive and sustainable

- Limited research is being conducted in Jamaica on new materials and processes, use of indigenous materials and development of distinctive product identities. This makes products generally uncompetitive in comparison with regional and global counterparts. There is significant wastage of raw materials and use of unsustainable supply sources.
- Generally, there is limited quality, diversity, authenticity of art and craft and no distinct competitive advantage. A general lack of innovation and product differentiation causes too much homogeneity in goods available for sale. The use of product design techniques and design to appeal to various market segments is limited, as is the telling of stories through products and product experiences. This results in a narrow range of product offerings, low visibility of authentic Jamaican products and the fact that craft products also generally offer low value for money.
- Limited avenues and opportunities to engender and foster creativity in design through competitions and promotions
- There is limited specialized production and retail infrastructure and lack of an integrated approach to developing an ecosystem for innovation and commercialization; inadequate knowledge about new materials, approaches and technologies, ICT support, commercial systems for retailing and current market trends; use of inefficient or outdated techniques and technologies
- Craft producers lack adequate resources and are often challenged by inadequate strength of design, inadequate business acumen and access to financing, inconsistency in product and service quality, lack of interest in linkages and collaboration, insufficient use and awareness of intellectual property rights and licensing and an inability to reproduce in large quantities and to adhere to customer or corporate specifications. This is in part due to a lack of awareness, interest in and use of standards and standardization techniques. Some micro producers lack access to adequate factory infrastructure and appropriate small tools and equipment to produce quality work. In general, there is an inability to fill and sustain volume orders in a timely manner according to the expectations of the market and a lack of awareness about international requirements and markets, as well as the rapidly changing tastes of consumers and trends affecting product purchases.
- There is a need to address poor quality approaches to packaging, labelling and lack of adherence to product and commercial standards and to improve product traceability, particularly in the context of tourism and export sales. The absence of this is, in part, responsible for limited penetration of regional and international markets with Jamaican craft products.
- Lack of appropriate advocacy, lobbying and ineffective representation to tackle the orderly development of the sector and the needs of the market
- Low barriers to entry for vendors and artisans generally results in a narrow, short term focus on selling as opposed to business development and there are insufficient training and upgrading interventions available to enable producers to enhance product quality and value in the eyes of customers

- Most markets operate mainly as large craft stores; rather than an area where indigenous handicraft are created. Vendors often purchase from their main competitors in wholesale rather than making anything themselves. Most of the craft markets are not ideally located and tend not to benefit from stopover and cruise visits. The Parish Council funding base is reportedly inadequate to address maintenance and rehabilitation of market infrastructure. The prevailing vendor culture is negative, with reported experiences of ‘hustling’ and infringing behaviour and generally the management of craft market system to provide a quality customer experience is poor. Perceptions of disorderly behavior on the part of vendors, overcrowding and limited value of craft products have also resulted in limited access to areas where visitors are concentrated so there is a need for streamlining of the customer experience to match expectations and provide value and a positive shopping experience.
- There is a lack of effective marketing and promotion in local and export markets and limited purchases of local crafts due to weak market demand. Marketing and merchandising strategies are often non-existent and ineffective and inappropriate segmentation and pricing systems are widespread
- Generally, there is fragmentation and low awareness of the tourism-related opportunities including the use of craft as gifts, as décor in accommodation and potential use of craftsmanship skills in infrastructure. There is no large scale coordinated promotion and marketing of the craft sector to support awareness and audience building to sustain patronage of the sector.
- There is a need for structured programmatic interventions to develop viable business models in the craft sector, including the development of supply and value chains through integrated approaches to product development, incubator support, marketing, and financing of new and existing products.
- Dedicated institutional support is critical to the streamlining of the craft sector, including the establishment of a central coordinating body such as an inter-ministerial Craft Industry Council to log information on the local sector, disseminate and act as coordinating intermediary between government bodies, private players and key industry stakeholders (cruise ship/tour operators), create strong linkages between producers, traders and end consumers and enable adequate coordination between government agencies, producers and the market while supporting the development of sub-sector associations to provide strong representation of the industry.
- Limited attention is being directed to the retention and upgrading of traditional skills through an approach that blends the revival of dying arts and skills with the trends and demands of the market. The use of traditional skills can be a source of competitive advantage in building cultural industries and distinctive products.
- Contrary to best practices in other countries, there is inadequate integration of design-oriented talent, including young designers and new designers working with artisans to achieve the cross-fertilization of market ready ideas for commercial production. This is linked to the absence of dedicated institutional support for craft development and a poor

enabling environment; with no subsidies towards operational costs, in particular electricity, cost of inputs, tariffs and other duties and charges for local producers. There are no consistent, dedicated, medium-term programmes that aim to protect the identity of authentic Jamaican craft, develop appropriate branding and support public education, marketing and promotion. Consequently there is limited visibility. Visual art education and training is targeted to a limited audience at the tertiary level and there are a few, occasional programmes at the community level. These appeal to limited populations. There are limited incentive schemes or artist/ artisanal development funds. There is an absence of craft clusters and industry groups linked to specific geographic regions, products and types of materials which could support the development of local craft with distinctive qualities.

3.3.3 Opportunities

- Creation of an inter-ministerial Craft Industry Council by the portfolio Ministry to spearhead the industry development, improve regulation, conduct product and market research while implementing programmes for product and market development
- Diversified craft product development will improve revenue and profit generation. There is need for better segmentation and differentiated pricing for the high, middle and low end of the market and for sales outlets to appeal to various levels in the market (fine craft, souvenirs, handmade products, and contemporary craft). Programmes to support distinctive packaging, labelling and branding of authentic Jamaican craft products are also opportunities to increase sales and profits. There is potential to employ technology in product and service delivery for craft and scope for greater use of design techniques and training of skilled craft persons in new materials and processes.
- Reshaping of the perception of the artisan or visual artist and improving visibility through a promotional campaign, awards and incentives
- The improvement of visibility and the awareness of high quality authentic Jamaican craft by the inclusion of Things Jamaican outlets in airports, cruise ship terminals, hubs and places of interest.
- The development of the sector value chain can lead to the creation of an expanded local retail sector and interiors and fashion industries. There is scope for export development targeted to new and traditional markets and better use of trade and inter-governmental agreements to support craft development as well as programmes to support social media marketing, E-commerce and internet trading and distribution.
- Improvement in quality through the development of a system of minimum craft standards and a rating certification programme linked to the attainment of these standards, in addition to technical assistance to producers at all levels to meet the requirements
- Some craft markets can be marketed as Heritage Sites and there are opportunities for marketing of craft within the context of cultural events and cultural sites. Craft markets can potentially become creative hubs and clusters for the display of art, craft and cuisine; major improvements to the markets can significantly present renewed and exploitable opportunities for the vendors and new public- private investment.

- Mobilization of local communities to take advantage of indigenous raw materials in craft design and production
- Revival of traditional skills as a basis for cultural marketing of products
- Creation of cottage industries to fill gaps in the supply chain and the associated systems for environmental monitoring and orderly development
- Increased automation and mechanization, use of ICT and Computer Aided Design to further strengthen supply capability
- The introduction of design and technology, craft skills and entrepreneurship courses into the primary and secondary level school curriculum to foster the development of skills and competencies and by extension the interest of the youth in developing enterprises to grow the industry.
- Protection of IPRs of Artisans and designers through registration and creation of additional income streams through licensing
- Development and ongoing redevelopment of craft studio tours, showcases and visitor participation activities
- Provision of new promotional materials, product development and marketing programmes to support the visibility of Authentic Jamaican products and product branding
- Development of new business models involving collaboration, partnership, social enterprise and sustainability
- Increase the availability of expanded physical incubator support, accessible island-wide to support new product development, packaging, labelling and export development
- Renovation of unused spaces to provide access to infrastructure for artistic production for craft businesses and communities; creation of Artisan Villages and Creative Districts
- Changing market trends, once monitored, enable artisans to be aware of consumer demands and adjust product development to meet demands

3.3.4 Threats

- The viability of the Jamaican craft sector in its present format is uncertain. Reported low earnings by producers, too many sellers chasing too few buyers, outdated product lines and lack of supply capacity as well as high levels of competition from imports and mass produced items mean that without strategic intervention, the sector is unlikely to survive
- There is a generational disinterest among the young (under 30), to continue tradition and heritage
- The current situation of imports of crafts and souvenirs is a major threat to the development of a local craft industry. Low-cost souvenirs are being imported with the imprint of the country name ‘Jamaica’ permanently etched into the surface. This is at times done in a manner which could mislead the purchaser into perceiving the item as locally made, since the country of origin is placed on the transit packaging which can then be removed before sale.
- Inability to stop illicit reproduction of craft and souvenir items in cheaper versions: artistic expressions could be copied once the artisan makes his/her work publicly known; machine-

made products could easily be substituted for hand-made ones, especially in our knowledge-driven high-tech times, rendering an artist/artisan irrelevant to duplicate his work

- The products of craftspeople and visual artists are not generally basic needs for consumers. As a result, consumption of these products may decline when consumer spending is down, especially during economic downturns.
- Competition from the market's suppliers and wholesalers; and in domestic markets, particularly from in-bond retail companies as well as from international producers offering items of equal or greater value and quality and benefiting from incentives and other forms of support
- The socioeconomic factors and variables such as crime and poverty may have a negative impact on the success of the Craft Markets and other sites and there seem to be too many products of inferior design and quality chasing too few and very discerning consumers.
- Current tour company arrangements are reportedly deliberately diverting customers from the Craft Markets due to fears of harassment as well as exclusive fee paid arrangements and the Markets are not being directly promoted and mentioned on a destination level
- Modern industry is enabling an increasing degree of mass customization and personalization of product offerings using technology. This could lower the demand for handmade craft items
- It may be difficult to track products that have been duplicated or illegally copied and distinguish between locally made and imported products
- Globalization of markets means that consumers as well as competitors are in geographical proximity; in addition the use of the Internet has given consumers worldwide unlimited choice. Interest in craft is a small niche, so craft sales need to be supported by marketing, promotions, tours and events to create interest and wider audiences
- Competing countries are equipped with better technologies and make better use of available indigenous raw materials and therefore are more competitive. Export incentives are afforded to large scale craft producers in competing countries. This encourages them to export products into open importing markets like Jamaica which are dominated by micro-producers with inadequate supply capability to satisfy the significant existing market demand.

4. POLICY AND LEGISLATIVE ENVIRONMENT

Craft, visual arts and artisanal products are varied in type and are difficult to define and classify due to their lack of homogeneity. As a consequence, the policy and legislative environment which impacts craft development is that which applies generally to commerce and trade in goods; in particular, cultural goods.

4.1 Current Regional and International Environment

4.1.1 The UNESCO Conventions and United Nations 2030 Agenda

In 1983, Jamaica accepted the UNESCO Convention Concerning the Protection of the World Cultural and Natural Heritage (1972). The Convention concerns the identification, protection, conservation, presentation and transmission to future generations of the cultural and natural heritage of mankind, recognizing the rights of sovereign States; where this heritage is viewed to be of “Outstanding Universal Value”. In July 2015, The Blue and John Crow Mountains were inscribed to the World Heritage List by UNESCO. The terrain is directly and tangibly associated with the historical events and living traditions of the Windward Maroons led by National Hero Nanny. The mountains are Jamaica’s first UNESCO World Heritage Site and are the first mixed site (representing cultural and natural significance) in the Caribbean region to be recognized by UNESCO. The World Heritage Site designation is an important marker for tourists seeking experiences aligned with culture and heritage and consequently, provides additional opportunities for the positioning of cultural products, including craft.

In 2007, Jamaica ratified the 2005 UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions. The main objective of the Convention is to provide a legally binding international agreement that reaffirms the sovereign right of States to adopt cultural policies which support their cultural industries. The Convention advocates that given the identity of cultural goods and services as conveyors of cultural values and meaning, they should not be restricted in their treatment as economic goods. These insights were seen as relevant in the context of the global proliferation of trade agreements which promote advancing market liberalization.

In 2010, Jamaica also ratified the 2003 UNESCO Convention for the Safeguarding of the Intangible Cultural Heritage. This imposes on the State the obligation to protect its Intangible Cultural Heritage (ICH). ICH, also known as “living heritage” refers to the practices, representations, expressions, knowledge, skills, instruments, objects, artefacts, and cultural spaces, which are associated with communities, groups and individuals that recognize them as part of their heritage. ICH is transmitted from generation to generation, recreated in response to interactions with the environment and provides a sense of identity and continuity to its custodians. Various forms of ICH include oral traditions, religious rites, traditional medicine, language, music and dance, as well as traditional craftsmanship, among others. In November 2003, UNESCO declared the Maroon Heritage of Moore Town, Jamaica as a Masterpiece of the Oral and Intangible Heritage of Humanity. Other examples of ICH existing in Jamaica today are Kumina, Rastafari, storytelling and traditional craft.²⁶

²⁶ African Caribbean Institute of Jamaica/ Jamaica Memory Bank (n.d.), Jamaica’s Intangible Cultural Heritage: Promoting respect for cultural diversity and human creativity (brochure)

In September 2015, the United Nations unveiled its 2030 Agenda for Sustainable Development, which established a new framework action plan to advance the work done under the Millennium Development Goals and address the areas where progress was incomplete. The plan comprises 17 integrated goals and 169 development targets. The Sustainable Development Goals are as follows:

- End poverty in all its forms everywhere
- End hunger, achieve food security and improved nutrition and promote sustainable agriculture
- Ensure healthy lives and promote well-being for all at all ages
- Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all
- Achieve gender equality and empower all women and girls
- Ensure availability and sustainable management of water and sanitation for all
- Ensure access to affordable, reliable, sustainable and modern energy for all
- Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all
- Build resilient infrastructure, promote inclusive and sustainable industrialization and foster innovation
- Reduce inequality within and among countries
- Make cities and human settlements inclusive, safe, resilient and sustainable
- Ensure sustainable consumption and production patterns
- Take urgent action to combat climate change and its impacts*
- Conserve and sustainably use the oceans, seas and marine resources for sustainable development
- Protect, restore and promote sustainable use of terrestrial ecosystems, sustainably manage forests, combat desertification, and halt and reverse land degradation and halt biodiversity loss
- Promote peaceful and inclusive societies for sustainable development, provide access to justice for all and build effective, accountable and inclusive institutions at all levels
- Strengthen the means of implementation and revitalize the global partnership for sustainable development

4.1.2 International Copyright Treaties

Jamaica is a signatory to the World Intellectual Property Organization (WIPO) Convention since 1978. WIPO is a specialized United Nations agency, created in 1967 to encourage creative activity and promote the protection of intellectual property throughout the world. Jamaica is signatory to several WIPO Treaties, whose impact on the craft/ artisanal sector is summarized in Table 8 below.

In addition, efforts are underway at the regional and international level to identify and create measures that can be used to exert some form of control over the use by third parties of

intangible property which is associated with Traditional Knowledge (TK), Traditional Cultural Expression (TCE's) and Genetic Resources (GR's). Creations and innovations that are tradition-based have economic and cultural significance as well as commercial potential when applied in downstream creative industries such as film and entertainment, cultural tourism, architecture, fashion and cuisine and traditional industries such as agricultural, biotechnological, pharmaceutical and healthcare industries. Regional and international efforts aim to avoid the misuse of these forms of IP, without adequate recognition and sharing the commercial benefits derived with communities and countries of origin.

Treaty	Date of Effect	Summary Implications for craft/ artisanal products
Berne Convention for the Protection of Literary and Artistic Works , 1886	1994-01-01	introduced the concept that a copyright exists the moment a work is "fixed", rather than requiring registration enforces the requirement that countries recognize copyrights held by the citizens of all other signatory countries
Agreement on Trade-Related Aspects of Intellectual Property Rights (TRIPS),1994	1995-05-09	World Trade Organization (WTO) Agreement that sets down minimum standards intellectual property (IP) regulation as applied to nationals of other WTO Members Places IP issues within the context of international trade
WIPO Copyright Treaty (WCT), 1996	2002-06-12	provides authors of works with control over their rental and distribution (Articles 6-8) prohibits circumvention of technological measures for the protection of works (Article 11) and unauthorized modification of rights management information contained in works (Article 12)

Within the context of the community-based nature of the Jamaican craft industry, these elements of intangible heritage, which are passed from generation to generation, may be particularly valuable to the establishment of community based enterprises which contribute to improvement in livelihoods and poverty reduction. While there are no universally recognized definitions of 'Traditional Knowledge' or 'Traditional Cultural Expression', working definitions being used in WIPO are summarized in Table 9 below.

Type	Definition	Examples
Traditional Knowledge	the content or substance of knowledge resulting from intellectual activity in a traditional context	Know-how, skills, innovation, practices and learning embodying traditional lifestyles or indigenous and local communities or contained in codified knowledge systems passed between generations
Traditional Cultural	<ul style="list-style-type: none"> Traditional forms, whether tangible and /or intangible, in which traditional culture and knowledge are expressed, appear or are 	<ul style="list-style-type: none"> verbal expressions, such as stories, epics, legends, poetry, riddles and other narratives, words, signs, names and symbols musical expressions such as songs and

Expressions	<ul style="list-style-type: none"> manifested the products of creative intellectual activity including individuals and communal creativity, characteristic of a community's cultural and social identity and cultural heritage and maintained, used or developed by such community or by individuals having the right or responsibility to do so in accordance with the customary law and practices of that community 	<ul style="list-style-type: none"> instrumental music expression by action such as dances, plays, ceremonies, rituals and other performances tangible expressions such as productions of art in particular drawings, designs paintings (including body-painting) carvings, sculptures, pottery, terracotta, mosaic, woodwork, metal ware, jewelry, baskets, needlework, textiles, glassware, carpets, costumes, handicrafts, musical instruments and architectural forms
Genetic Resources	<ul style="list-style-type: none"> species, sub-species or genetic varieties of plants, animals and micro-organisms that have actual or potential value 	<ul style="list-style-type: none"> natural fibres (thatch, wicker, leather) and seeds
Source: Adapted from JIPO, "Traditional Knowledge, Traditional Cultural Expressions and Genetic Resources", https://www.jipo.gov.jm/?q=node/90		

4.1.3 Regional and International Trade Agreements

Jamaica's is a member of a significant number of international organizations, including CARICOM, the Organization of American States (OAS), United Nations Industrial Development Organization (UNIDO), United Nations Educational, Scientific and Cultural Organization (UNESCO), United Nations Conference on Trade and Development (UNCTAD) and World Trade Organization (WTO), all of which have occasionally been involved in decision making and work programmes to impact the craft sector.

Jamaica participates with other CARICOM States in the regional integration movement towards a Single Market and Economy (CSME). The CSME aims to gradually establish the free circulation of goods, services and capital among CARICOM Member States without restrictions. Currently, there is a common external tariff (CET) for goods originating outside of CARICOM and a system that allows goods made within the region to be traded within CARICOM without the application of tariffs, subject to the certification of their origin. Jamaican goods that have already entered a CSME country are eligible for export/import into another CSME territory without duty. Jamaicans also have the right to establish a business in another territory in the CSME without restriction. Artisans with Caribbean Vocational Qualifications (such as those issued by Heart Trust/NTA) are among ten (10) categories of persons eligible for free movement exemptions from work permits under the Caribbean Community Free Movement of Skilled Persons Act. Access to Free Movement provisions is conditional on a process of registration through a national contact point (in the case of Jamaica the Ministry of Labour and Social Security), which includes examination and verification of qualifications.

Through membership in CARICOM, Jamaica has trade agreements with its major trading partners, including the United States, European Union, Canada, Costa Rica, Cuba, Colombia, Dominican Republic and Venezuela. These trade pacts and other bilateral agreements provide a

range of opportunities for Jamaican craft exporters to sell their products, access expertise, attract investment and source raw materials and other inputs, including technology. The European Partnership Agreement (EPA) accords immediate duty-free, quota-free market access for all CARIFORUM²⁷ goods into the EU, with the exception of sugar. The Caribbean-Canada Trade Agreement (CARIBCAN) is a preferential arrangement guaranteeing duty free access to Canada for a wide range of products excluding textiles and apparel, footwear, luggage and handbags, leather garments, among others. Other items are eligible for duty-free status if they can be certified as being grown, manufactured or produced within the Commonwealth-Caribbean or Canada. The Caribbean Basin Initiative (CBI) Act was established by the US in 1984 to provide economic aid to Jamaica (and 23 other countries in the Caribbean and Central America) through the waiver of tariff benefits. Under the CBI, apparel manufactured in eligible CBI countries from U.S. yarns and fabric, as well as non-textile products excluded from earlier CBI legislation, will enter the United States free of quota and duty. Most products manufactured or grown in CBI beneficiary countries are eligible for duty-free entry into the United States. JAMPRO, the government's trade promotion agency, states that handicrafts, giftware, and decorative accessories are among the most successful eligible CBI products that have been developed for export by both U.S. and Caribbean Basin companies²⁸.

4.2 National Environment

4.2.1 Vision 2030 Jamaica: National Development Plan

Vision 2030 Jamaica is a strategic road map which aims to make Jamaica the place of choice to live, work, raise families, and do business, by the year 2030. The Sector Plan for Tourism prepared by the Tourism Task Force and completed in September 2009 is one of thirty-one sector plans that form the foundation of the National Development Plan. Its stated objectives are:

- To realize the vision of an inclusive, world-class, distinctly Jamaican tourism industry that is a major contributor to socio-economic and cultural development, with a well-educated, highly skilled and motivated workforce at all levels within a safe, secure and sustainably managed environment
- *widen* the participation in the tourism industry by local stakeholders;
- improve training and working conditions at all levels;
- promote investment and economic linkages;
- diversify our tourism product, source markets and market segments;
- improve standards and levels of customer service; increase the value earned and retained from each tourist;
- increase the use of Jamaican inputs and culture in all areas of the industry; and
- strengthen the integration of tourism development with sustainable land use planning and environmental management.

²⁷ CARICOM and the Dominican Republic

²⁸ <http://www.jamaicatradeandinvest.org/trade/trade-agreements>

The Sector Plan further states that the Jamaican tourism product comprises a complex value chain and network of services catering to visitors and domestic travellers. The industry is comprised of various private and public players in various sub-sectors, including: accommodations, tourist attractions, food and beverage facilities, ground transport, in-bond shopping, and crafts. The structure of the craft sub-sector in Jamaica is largely informal. Noting that the craft sub-sector had not grown significantly during the previous five years as a result of the various problems/ challenges facing the industry, including: competition from in-bond shops; low skill level of craft vendors which translates into:

- poor output of craft items;
- craft vendors not using skills learnt;
- poor craft market facilities; and
- lack of patronage from tourists who sometimes do not leave hotel properties or cruise liners.

The Sector Plan proposed that the renovation and construction of several craft villages and markets, as well as increased promotion through Things Jamaica and other ventures, were expected to improve growth potential within this sub-sector. It further stated that, in planning for the expansion of resort areas, it will be important to plan for the development of the craft industry so that craft producers and vendors are not placed at a disadvantage to other components of the shopping sub-sector, including in-bond merchants and souvenir stores.

In 2012, the Planning Institute of Jamaica published a *Growth-Inducement Strategy for Jamaica in the Short and Medium Term* as a practical vehicle to carry forward the Vision 2030 Plan. The Growth Inducement approach was guided by a mission to determine the explanations for Jamaica's consistently weak performance in terms of economic growth through strategic analysis. The strategy also sought to focus resources and action at those points which are identified as critical to releasing binding constraints and capable of yielding demonstrable and significant results in a short and medium-term context. These include crime and violence, corruption, taxation, supply of electricity, finance and macroeconomic instability. Supply-side factors in the business environment ("external" to firms) which have a significant effect in terms of the cost, risk and uncertainty of business activity were also explored. These included bureaucracy and regulation, quality of the labour force, quality of infrastructure and foreign trade regime. Factors related to the "internal" operations of firms, individually or collectively within industries, including intensity of competition, financial market development, technological readiness, business sophistication and capacity for innovation were also identified.

One component of the Growth Inducement Strategy was the recommendation to exploit the full potential of the business-network model to promote synergies within and among targeted clusters of economic activity, reduce transaction costs and realize economies of scale: build and strengthen backward and forward value-chain linkages among firms (e.g. business incubator networks; linkages between tourism, agriculture, agro-processing, and local services (health, sports, food, crafts, entertainment)) and to promote the emergence of new clusters of activity based on a logistics hub. These initiatives were to be deployed in the short to medium term,

through collaboration between the Ministry of Tourism and JAMPRO in the areas of Health, Heritage and Medical Tourism; and JAMPRO and the JBDC in the case of entertainment, crafts, food and attractions.

The Medium Term Socio-Economic (MTF) Framework published by the Planning Institute of Jamaica presents a rolling implementation plan for the implementation of Vision 2030. The priorities of the tourism sector under MTF 2015 – 2018 are as follows.

- Further enhancement of the tourism product to leverage international competitiveness
- Facilitate the development of other varieties of tourism accommodation
- Further development and diversification of geographic source markets and niche markets
- Continue deepening tourism linkages
- Continue to facilitate awareness and broaden inclusiveness
- Mainstream environmental sustainability and adaptation of the tourism sector to climate change
- Develop human resources and improve tourism worker welfare.

In line with the objective to develop internationally competitive industry structures in tourism and the strategy to develop new tourism market segments, the plan proposes the promotion of heritage-based tourism through the continued focus on the development and preservation of the country's major heritage assets; including the areas of Port Royal, Seville, Spanish Town and Falmouth. The Ministry of Tourism and the Ministry of Culture, Gender, Entertainment and Sport are jointly responsible for implementation. The strategy for enhancing visitor experience through product development would be guided by the National Craft Policy and Craft Industry Council.

4.2.2 Support to Micro and Small Enterprise Development

The Ministry of Industry, Commerce, Agriculture and Fisheries revised the Micro, Small and Medium Enterprise (MSME) and Entrepreneurship Policy in 2017 and through its key agencies and other private and public support bodies, will spearhead implementation. The sub-headings of the policy recommendations are linked to the main challenges experienced by MSMEs in Jamaica, namely: Informality, Access to Finance, Market Access, Business Support Services, Training and Development, Innovation and Productivity, Technical Skills, Promotion of Entrepreneurship and Policy Research and Linkages. The recent inclusion of Social Enterprises as a sub-group for focused policy attention is of significance to the value chain management approach to craft industry development.

4.2.3 Support to Cooperatives and Clusters

The Industrial and Provident Societies Act dates back to 1903, with a recent revision to improve the regulation of charity-based organizations in 2010. A society may be registered for carrying on any industries, businesses or trade specified in, or authorized by, its rules, whether wholesale or retail, provided there are a minimum of seven members. They are characterized by a permanent share capital which is held in common among its members. Registered societies are

recognized as legal corporate bodies with the authority to transact loans, contracts and land deals. Where societies have more than fifty members, they enjoy specific treatment under Sections 45 and 46 of the Income Tax Act (1955, amendment 2009). These include the payment of share interest without the deduction on of tax.

4.2.4 Cultural Policy and Craft Development

The National Cultural Policy of Jamaica published in December 2003 and titled *Towards Jamaica the Cultural Superstate* is in the final stages of revision and is expected to be submitted to Cabinet before the close of the 2017/2018 Financial Year. The revised document is titled, “The National Policy on Culture and Creative Economy 2017-2027: Toward the Enhancement and Promotion of Brand Jamaica”. It is elaborated within the knowledge and awareness that the global impact of Jamaica far surpasses its geographical size.

The National Policy on Culture and Creative Economy notes that Brand Jamaica is among the world’s most outstanding national brands. Brand Jamaica’s resilience has influenced and been impacted by the global reputation of the national products of Jamaica: our renowned world-class Reggae music; our tourism product anchored in the unique offerings of our cultural space and people; our colourful and illustrative nation language which has found its way among the idioms of the world; our achievements in literature, academia and business enterprise. Additionally, the National Policy recognizes the outstanding role played by the creative sector, to include the Craft Industry, as one of the primary engines of growth within the national economy. It recognizes that authentic Jamaican crafts are among the products that are steadily being developed and positioned to engage global networks and value chains locally and internationally. Largely without investment by the Government, the sector has over the period recorded high levels of growth and employment through job creation and global competitiveness. It has contributed substantially to youth employment, wealth creation and poverty alleviation.

A range of positions are articulated to support an enhanced global impact of Brand Jamaica through the leveraging of the vibrant, dynamic culture and expansive and economically impactful cultural and creative industries of the Jamaican people. These include the need for each Jamaican to have the necessary resources to tap into his/her creative potential for full unbridled self-expression, creativity and innovation, and where cultural and creative goods and services are major contributors to the transformation of the Jamaican economy. Also highlighted is the need for economic growth and development through positive adjustments to existing GDP by way of contribution of the cultural and creative industries; creation of new jobs and wealth creation mechanisms as well as the bolstering of existing jobs and wealth creation mechanisms; increase in the number of growing cultural and creative small and medium sized businesses; and the ‘legitimization’ of all cultural and creative business activities.

The Policy also speaks to deepening and strengthening of linkages with tourism, integrated marketing communication etc., across industries in private sector, and public education in public

sector; diversification of cultural and creative services available in the private sector; improved and increased social benefits that accrue to communities through cultural and creative endeavour; developing programmes for at-risk youth through cultural and creative economic and social activity and violence and crime addressed through social and economic cultural and creative interventions. The Policy Framework is therefore built around a number of areas to include Culture for Promotion of Social Health and National Well-being; Culture, Creativity and Innovation; Culture and the Promotion of National Treasures; Creative Economy and Business Development for Cultural and Creative Industries; Creative Economy, Education, Training and Human Capital Development; Creative Economy and Intellectual Property; Creative Economy and Tourism; Creative Economy and Youth Employment and the Creative Economy and the Festival Economy.

Recommendations contained within the policy framework, which could impact a national policy and strategy for craft development, are summarized in Table 11 below. The majority of the recommendations remain relevant today, with initiatives being undertaken to create a structured and strategic approach to achieve policy goals.

4.2.4 Conservation of Heritage

The Jamaica National Heritage Trust Act (1985) defines the operational authority of the Trust as the conservator of “protected national heritage”; defined by the Act to mean “any place name; any species of animal or plant life or any place or object (not declared by the Trust to be a national monument), so designated by the Trust”. Under the Act, craft objects may be designated as artefacts based on historical significance and benefit from the support of the Trust in gaining protection. There is no specific national legislation related to the systematic conservation of the legacy of traditional skills.

4.2.5 Tourism and Craft Development

The National Community Tourism Policy and Strategy (2015) defines Community Tourism Enterprises (CTE) based on their role in promoting the local tourism value chain through linkages, where appropriate, to agriculture, arts and crafts, food service and related small businesses in the community. The policy document states that authentic, vibrant folk forms, art and craft, musical heritage in particular reggae music, mento and ska are a strength of Jamaica’s community tourism offering and proposes that the development of a strategy to revitalize the traditional arts and handicraft industry in Jamaica, create employment and business opportunities, and offer tourists options to purchase unique, locally-made souvenirs, is a key opportunity for the sub-sector.

The 2002 Master Plan for Sustainable Tourism Development²⁹ (MPSTD) in Jamaica was developed through a process of wide consultation and has the overall objective of moving the industry on a path to sustainability. Specific objectives include growth based on a sustainable market position; enhancing the visitor experience; community-based development; spreading the

²⁹ Commonwealth Secretariat (2002), Master Plan for Sustainable Tourism Development: JAMAICA

benefits of tourism through an inclusive industry; and ensuring environmental sustainability. The preparation of a Cultural/Heritage Tourism Development Study was concluded as an integral component of the overall plan. The Plan envisioned the objective of an inclusive tourism industry, to be enabled through various strategic measures, including

- assisting the development of arts and crafts, improving merchandising and business management skills of vendors and helping them access finance;
- improving linkages with arts and crafts, agriculture and small businesses (p.18)
- engaging self-employed and small businesses in the formal and informal sector to improve the livelihoods they earn from the industry by working with business support agencies targeting micro and small businesses, and
- ensuring that all existing and new attractions, scenic routes and circuits and themed trails provide opportunities for local people to sell goods and services to visitors.

The latter provision would be incorporated in the environmental impact assessment criteria for all tourism projects. Other strategic recommendations related to craft development outlined in the MPSTD are summarized in Table 10 below. Many of these recommendations appear not to have been implemented due to a lack of structured strategic programming and adequate institutional support. They will therefore be incorporated into the current policy and strategy approach.

The Tourist Board (Prescribed Areas) Regulations (1985) governs the operation of tourism enterprises, including craft vendors. The Regulations define a "vendor" as any person who sells or offers for sale, rents or offers for rent to members of the public any goods or services; or solicits orders for, invites attention to, advertises or promotes in any manner whatsoever, any goods or services, excluding taxi operators or a contract car operator. Subject to the regulation, vending activities are not allowed in or on any street, sidewalk, park, beach or area of water adjacent to a beach or on any other public place within a prescribed area, unless that person is the holder of a licence granted under the Regulations and activities are carried out in accordance with the terms and conditions of that licence. The Board may, in its discretion, refuse to grant or renew a vendor's licence. The Regulations also prescribe grounds for appeal.

With the payment by the licensee of a nominal fee, the Regulations provide for the issue of a Tourist Board's decal which should be displayed within the place of business in a prescribed area. The decal remains the property of the Board and may be withdrawn at any time if the standards of the licensee do not justify its display. The decal should be returned where a vendor's licence is suspended or revoked, as the case. The Regulations further mandate compliance by licensees who operate stalls, booths or other structures within prescribed areas to comply with such requirements as may be prescribed, maintain such premises, stall, booth or structure in a safe and sanitary condition; take such steps as may be necessary to ensure that such premises and the area immediately surrounding such stall, booth or structure is reasonably free from litter. The Board may appoint such persons as the Board considers suitable to be inspectors for the purposes of these Regulations. Inspectors are furnished with an appropriate certificate of

appointment. The Tourist (Duty-Free) Shopping System Act (1974) enables a licensing system for the sale of an approved schedule of goods or consumables for export, free of customs, excise duty, general consumption tax or special consumption tax for which these goods would normally be liable.

Table 10: Recommendations related to craft development contained in Jamaica's Master Plan for Sustainable Tourism Development	
Key Issue	Summary Recommendation(s)
i. <i>Heritage Tourism development</i>	<ul style="list-style-type: none"> • The heritage assets of Jamaica are unique and distinctive factors, capable of helping to differentiate it from all other Caribbean islands in market positioning. • The Plan states that heritage tourism need not be exclusively involved in historical sites and features, rather, modern culture (including arts and crafts) is the outcome of the nation's varied history and can be used to show how various historical and cultural trends have come together to shape modern Jamaica.
ii. <i>Improvement in shopping experience</i>	<ul style="list-style-type: none"> • Shops and Craft Markets are part of the shopping experience for tourists. • training in merchandising skills for vendors • incorporation of facilities for local people to sell goods and services within resorts and the development of new, attractive sites for the selling of crafts, including within cruise terminals and airports
iii. <i>Improvement in quality of crafts</i>	<ul style="list-style-type: none"> • The quality of crafts produced is slowly falling, and many items are imported and what is on offer reflects neither traditional skills nor good value for money. • There is need for greater exposure to international trends and structured product development and diversification programmes.
iv. <i>Culture-based Tourism</i>	There is potential for the development of a showcase for the folk culture of Jamaica, including music, dance and the visual arts.
v. <i>Craft development programme</i>	<p>A structured programme is required, which would include:</p> <ul style="list-style-type: none"> • Improving available skills and raw materials • training of craft vendors in merchandising skills, marketing and product design in order to improve the range, appeal and quality of craft items • exposing Jamaican crafts producers to international trends by sponsoring them to take part in international craft fairs and exhibitions; • establishment of bilateral exchange programmes to develop artisans (initially with Haiti) • Commissioning leading Jamaican craftsmen to develop products which can be made economically by people with lesser skills and the dissemination of these designs • Providing better venues to sell handicrafts than the current crafts markets
vi. <i>Development of Craft Villages</i>	At the time of publication, the Ministry of Tourism instituted a programme for developing new and attractive craft villages. Based on this initiative the Urban Development Corporation appears to have done some research among stakeholders and pursued the development of preliminary planning, however these remain conceptual plans.
vii. <i>Building Local Ownership</i>	Through the engagement of local communities to define which heritage assets should be developed and what themes should be used, the communities that should be involved in developing and presenting products
viii. <i>Financing of competitions and</i>	<p>These incentives would include:</p> <ul style="list-style-type: none"> • A grant contribution to the cost of capital for developing Towns and Villages of Culture,

<i>incentives</i>	<p>consistent with Challenge Fund principles whereby an open, annual competition would be held to select one town or village for award</p> <ul style="list-style-type: none"> • Small grants for seed capital to support community-based projects, including eco-tourism, administered through community-based organizations and NGOs.
ix. <i>Redevelopment of Craft Markets and development of new spaces.</i>	<p>Craft markets are described by the MPSTD as deserving of urgent attention. Outside of the craft markets, adequate provisions should be made of sites for micro and small businesses to sell crafts, services and other goods to the visitor. The provision of such space should be built into the design of all attractions, trails, resort centres, towns and villages of culture, among other locations.</p>

Table 11: Recommendations related to craft development contained in the National Culture Policy of Jamaica

Key Issue	Summary Recommendation(s)
i. <i>Positioning, promotion of craft</i>	<ul style="list-style-type: none"> provision of spaces for products nationally and within tourism events, in communities and internationally through festivals, cultural exchanges, conferences and trade fairs; In certain instances adopt measures conducive to guaranteeing such spaces, which may include content requirements, incentives, subsidies and others.
ii. <i>Protection, promotion of cultural expressions</i>	<ul style="list-style-type: none"> recognize, protect and promote all cultural expressions and products developed by the Jamaican people in the course of history ...including any form or expression notable or recognizable as Jamaican and which would be a source of national pride and identity promote the use of authentic cultural expression in properties and tourism centres across the island, to include a circuit of cultural presentations that allow visitors to experience Jamaica's cultural diversity
iii. <i>IP Protection</i>	<ul style="list-style-type: none"> promote the protection of copyright and related rights and the preservation of intellectual property rights
iv. <i>Institutional support</i>	<ul style="list-style-type: none"> provide institutional support for craft development, including export provide support for institutions of excellence (cultural treasures) through incentives to guarantee their continuity and sustainability establish mechanisms aimed at generating a one-stop-shop for information and administrative support for artists who desire to expand and enhance the export potential of their cultural product
v. <i>Education</i>	<ul style="list-style-type: none"> Encourage and promote programmes in schools and the wider community geared toward the establishment of a strong cadre of dynamic, vibrant young artists that demonstrate the excellence associated with our cultural tradition; encourage or support the upgrading of centres/institutions responsible for professional training in the arts to ensure that artists are able to receive training of the highest quality here in Jamaica provide additional resources to the Edna Manley College of the Visual and Performing Arts, JCDC and the National Gallery to ensure a broadening of their offerings in cultural management, training and expertise; strengthen the Performing and Visual Arts offerings of secondary and primary schools, providing and guaranteeing spaces for cultural production and opportunities for artistic and cultural excellence.
vi. <i>Empowerment of traditional knowledge bearers</i>	<ul style="list-style-type: none"> Give direction and support to the Institute of Jamaica for the development of an instrument aimed at providing traditional knowledge bearers with opportunities to earn from their knowledge inclusion of traditional knowledge bearers in activities promoted by national cultural agencies and training organizations geared at the preservation, dissemination and marketing of products associated with them, in an effort to assure authenticity
vii. <i>Research and Data Collection</i>	<ul style="list-style-type: none"> Coordinate the collection of data and promote research on cultural industries in order to assess the value of these industries and the significance of the contribution of the sector to the gross national product promote collaboration among the relevant cultural agencies, training institutions such as HEART/NTA, Edna Manley College, CPTC, the Institute of Jamaica, the Scientific Research Council and JAMPRO in the stimulation of research in traditional materials and methods in order to foster innovation in design and creativity within our cottage craft industries
viii. <i>Development of Cultural expression through heritages sites</i>	<ul style="list-style-type: none"> encourage communities to be involved in marketing and promoting of heritage sites and to collaborate to protect and preserve the environment in the face of the traffic associated with increased tourism business enact and promote legislation and guidelines for the use and development of heritage sites, attractions and properties that promote their sustainability and maintenance and their value in telling the story of the Jamaican people provide incentives for private sector involvement in the development of heritage sites
ix. <i>Incentives</i>	<ul style="list-style-type: none"> give support and assistance to the private cultural sector, through the provision of incentives, in the strengthening of their organizations; promote a framework that will be supportive of activities within the cultural industry value chain (related to the creation, production and distribution) through content quotas, incentives, tax exemptions, special incentive instruments and any other mechanism deemed important to achieve this end provide incentive funding to artists and arts institutions in order to enable them to carry out more reasonably their task of reflecting, presenting and interpreting the values of the people for the people enact legislation aimed at removing tariff barriers and duties and provide concessions and incentives for artists and cultural practitioners to import tools of trade, especially in relation to new technologies in an effort to promote and enhance the global competitive advantage of our cultural product provide financial support, directly or indirectly, for activities and programmes aimed at the promotion of domestic cultural promotion support the establishment of instruments, strategies and mechanisms related to the encouragement and promotion of entrepreneurship through the provision of facilities and incentives for persons engaged in this type of activity, based on the use of cultural expression in creative, innovative and dynamic forms related to self-employment and self-reliance; financial support and incentives should only be accessible to domestic producers.
x. <i>Financing</i>	<ul style="list-style-type: none"> support the establishment of a fund for cultural development and promotion that would enable cultural practitioners to engage in the production of quality cultural goods provide grants to the arts and artists to create new, dynamic works at the community level that tell more succinctly the story of the Jamaican people

4.2.6 Industrial Policy and Policies to support the development of new industries

Jamaica's "The National Industrial Policy (NIP): A Strategic Plan for Economic Growth and Development" was published in April 1995 with the objective of highlighting an integrated approach to development by attracting new investors in both the export and domestic sectors and increasing earnings from both traditional and non-traditional exports. The four (4) main components of the NIP are: Macroeconomic Policy, Industrial Strategy, Social Policy and Environmental Policy. The development of strategic clusters, including tourism, was proposed as a component of Industrial Strategy and the linkages between crafts and tourism was recognized. The Ministry of Industry, Commerce, Agriculture and Fisheries has indicated that a revised industrial policy process is underway.

In 2015, the Dangerous Drugs (Amendment) Act 2015 was introduced in support of decriminalization of the possession of cannabis in specific circumstances and according to certain conditions. A Fact Sheet published by the Ministry of Justice ³⁰ states that hemp is defined in the Amendment as a cannabis plant having a tetrahydrocannabinol (THC) compound content of less than 1%. THC compound is linked to narcotic effects. Hemp has been used since ancient times to make a wide variety of products including cloth, paper, rope, medicines, beverages and cosmetics. Hemp is excluded from the provisions of the Dangerous Drugs Amendment Act that apply to other forms of cannabis. However, the cultivation, processing, sale, import, export and other handling of hemp will be regulated by a licensing regime, administered by the Cannabis Licensing Authority.

Also in 2015, the Forestry Department, a State Agency with the mandate to manage forests, published a revised and updated Forestry Policy for Jamaica. In addition to their critical role as vital ecosystems, forest resources support livelihoods and are a potential source of raw materials for craft-making, including wood, natural fibres and non-timber products. The Forest Policy outlines eight principles that are viewed as critical to the sustainable management of Jamaica's forests which include transparency and accountability, the utilization of sustainable development and inter-generational considerations, best science and participatory and collaborative approaches in forest planning and implementation processes. The three overarching goals are Governance, Forest Ecological System Conservation and Socio-Economic Considerations. Among the ten objectives of the policy are establishment of management plans to support eco-tourism and reduction in the illegal harvesting of wood and non-timber products. Stated strategies include the facilitation of the establishment of standards for craft items using timber and non-timber products, protection of indigenous tree species and establishment of a supply chain from harvesting of the forest to final destination.

4.2.7 Intellectual Property Legislation

The Jamaica Intellectual Property Office (JIPO) facilitates the registration of copyright, designs, trademarks, patents, geographical indications and traditional knowledge. For craft persons and designers, intellectual property protection creates the framework for a claim of ownership of

³⁰ Sunday Gleaner newspaper of March 29, 2015

intellectual property rights, which come into being once a creative expression is fixed in a tangible form. Intellectual property rights enable creators to earn from their expressions, by collecting royalties from reproduction and sale of the works where these are exact copies of an original. Table 12 summarizes the key features of local intellectual property (IP) legislation.

Table 12: Local IP Legislation		
Type of IP	Reference	Summary Implications for craft/ artisanal products
Copyright	Copyright Act, 1993	<ul style="list-style-type: none"> • Copyright applies to original literary, dramatic, musical or artistic works, sound recordings, films, broadcasts or cable programmes and typographical arrangements • Artistic works include graphic works such as paintings, drawings, maps, charts, plans, engravings, etchings, lithographs, woodcut or similar works, as well as photographs, sculptures, collages, buildings and models of buildings • Copyright registration confers rights on creators of original works, including drawings, images and photographs to provide permission for their use, prescribe terms and conditions under which the works may be used and creators may earn from their use.
Designs	Designs Act, 1937	<ul style="list-style-type: none"> • Registration protects the rights of the authors of original designs, including rights related to reproduction and licensing • Design registration captures the unique ornamental or aesthetic aspects of an object, including three-dimensional features (shape or surface) or two-dimensional features (patterns, lines or colours) • It is applicable for the pattern, shape, configuration or ornament and to a wide range of craft processes including manual, mechanical or chemical processes • Designs are what make an article attractive and appealing and therefore add to the commercial value of the product and increase its marketability
Geographical Indications (GI)	Geographical Indications Act, 2004	<ul style="list-style-type: none"> • A GI is a sign used on goods that have a specific geographical origin and possess certain qualities or a reputation that are linked to that place of origin • A GI consists of the name of the place of origin of the goods and registration is typically controlled by communities / producer groups, e.g. Jamaican hemp • A GI assures the consumer that; (i) the product bearing the geographical indication is an authentic product from the geographic location indicated (ii) the product carries the unique characteristics and quality for which the product is known³¹.
Trade Marks	Trade Marks Act, 1999	<ul style="list-style-type: none"> • A trade mark is any sign that is capable of being graphically represented and of distinguishing the goods or services of one undertaking (i.e. any person, company or business entity) from those of another • A sign includes a word, (including a personal name), design, letter, numeral, colour, combination of colours or a combination of the foregoing or the shape of goods or their packaging. • As is the case for other businesses, trade marks in craft businesses are unique identifying signs used for branding

4.2.8 Product Standards Legislation

The Bureau of Standards Jamaica is a statutory body established by The Standards Act of 1969 to promote and encourage standardization in relation to commodities, processes and practices. Its main activities include: facilitating the development of standards and other requirements to which particular commodities, services, practices and processes must comply; monitoring for compliance;

³¹Source: <https://www.jipo.gov.jm/?q=node/51>

conducting tests and calibrating instruments; certifying products and management systems; providing industrial training and promoting research and education in standardization.

National standards are developed to improve the quality of local products to satisfy the requirements of international markets. At this time there are no overarching standards for all craft products, however individual standards apply to particular mass produced items which can also be handmade such as furniture, textiles and clothing, footwear and toys. A Code of Practice for the manufacture of wooden craft items has been published which establishes the minimum requirements for the manufacture and production of wooden craft items and is voluntary in nature. The document is focused on performance rather than prescriptive requirements for craft items. It may be applied to all wooden craft items in the manufacturing stage or at the point of sale to retailers and end consumers.

In relation to the export of handmade products, many countries maintain technical standards and regulations which apply to the materials, finishes and processes used in craft production of particular items. This is particularly the case where consumer health and safety may be compromised in the use of functional items; for example, the migration or release of toxic substances from glazes in ceramic tableware or use of toxic finishes in children's toys. Packaging and labelling of products are also subject to mandatory regulations. Imported items, or their packaging, may be subject to random testing on entry to the country either at the border or when placed in the market. Any detected non-conformance may have legally binding and costly consequences for importers of items and original exporting enterprises. Wherever feasible, Jamaican Standards are aligned with regional and international standards to facilitate greater market access for Jamaican manufactured goods and exports. The Bureau is the information focal point for queries on international standards notified to the World Trade Organization and is also the focal point for product certification; the process of certifying that a certain product has passed performance and quality assurance tests or conforms to requirements stipulated in the relevant standards.

4.2.9 Environmental Legislation

With increasing focus on the environmental sustainability of productive activity, including craft production, locally and globally, environmental legislation is an important factor influencing the development of the craft sector. The National Resources Conservation Authority Act (1991) empowers the National Resources Conservation Authority (NRCA) to take such steps as are necessary for the effective management of the physical environment of Jamaica so as to ensure the conservation, protection and proper use of its natural resources; among other functions. In performing the designated functions, the NRCA is empowered to, *inter alia*:

- develop, implement and monitor plans and programmes relating to the management of the environment and the conservation and protection of natural resources;
- formulate standards and Codes of Practice to be observed for the improvement and maintenance of the quality of the environment generally, including the release of substances into the environment in connection with any works, activity or undertaking;

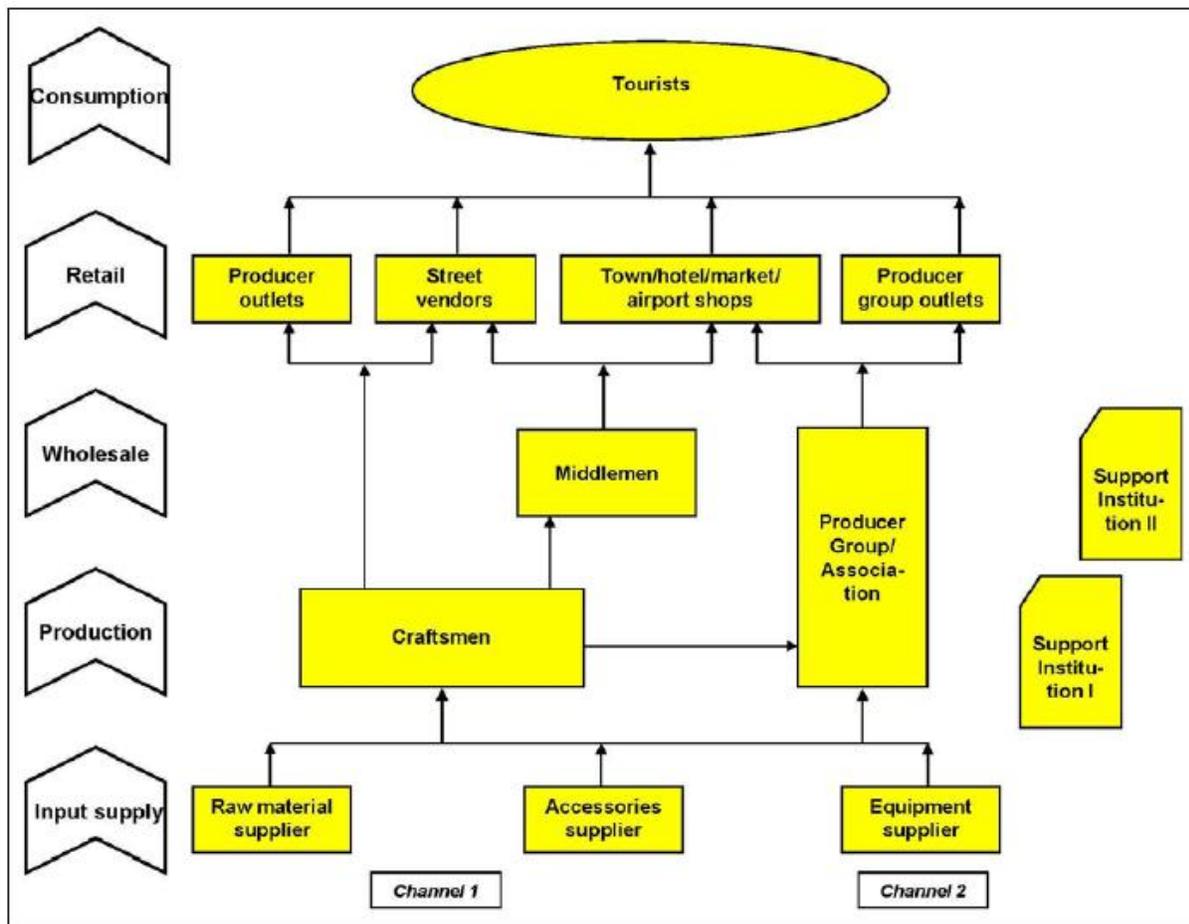
- investigate the effect on the environment of any activity that causes or might cause pollution or that involves or might involve waste management or disposal, and take such action as it thinks appropriate.

The National Environment and Planning Agency (NEPA) was established in April 2001 as an Executive Agency under the Executive Agencies Act to promote sustainable development by ensuring protection of the environment and orderly development in Jamaica. NEPA was founded to carry out the technical functional) and administrative mandate of three statutory bodies "the Natural Resources and Conservation, Authority (NRCA), the Town & Country Planning Authority, and the Land Development and Utilization Commission. The role of NEPA therefore entails management of the framework for conservation and protection (natural resources management); environmental management; spatial planning; compliance and enforcement; applications management; public education; policy and research; legal services and standards management.

5. KEY POLICY ISSUES

Figure 1 below shows a mapping of the tourism-related handicraft value chain, proposed by the International Trade Centre (ITC) and comprising the processes of input supply, production, wholesale, retail and consumption. It aims to highlight the typical processes and key players within the handicraft industry and the general relationships influencing the movement of handicraft products to tourist markets. Further research and analysis is required to completely map the situational realities in the Jamaican craft industry and to incorporate current and future opportunities along the value chain. These would include expanding production incubators, pop-up stores, events, artisan villages, community tourism, tour operators, e-commerce and export. The framework illustrated below is a useful basis to identify some of the key policy issues to be addressed in the context of existing gaps.

Figure 1 (below) A Tourism related handicraft value chain map



Source: International Trade Centre (2010), Inclusive Tourism: Linking the Handicraft Sector to Tourism Markets, Technical paper, ITC Geneva

5.1 Input supply

A key issue for local producers of craft is the cost and availability of raw material inputs and finishes. In general, there are challenges in obtaining readily available, quality raw materials and as a result there are relatively high levels of importation of inputs for craft production. Procurement costs for raw materials, import duties and taxes are reportedly high as a proportion of the value of goods produced. Jamaica has an abundance of natural materials to support an indigenous gift and craft industry including bamboo, Sea Island cotton and other natural fibres as well as agricultural materials which can be used to obtain natural dyes and finishes. JBDC, as an agency of MICAFA has been pursuing the development of natural fibre based materials and industries and serves in the development of standards for Bamboo and Indigenous materials with the BSJ team. This experience and know-how along with its partnership with RADA places it in a unique position to inform and support programmes aimed at the commercial cultivation and processing of fibres, well-suited as raw materials for the gift and craft sector. There are abundant supplies island-wide of various types of clay which although some local potters indicate that they produce unreliable results in firing, with the required processing and refinement are excellent for the production of fine ceramics. There is also significant scope for the use of reclaimed materials, including paper and plastic, to create new products with a positive ecological impact. There is need for greater diversification in the use of sustainable materials with streamlined creativity to generate signature products that can be uniquely identified with Jamaica. Of some concern, is the apparent popularity of craft products made of wood, which cannot be verified as originating from sustainable forests. In addition to the potential negative ecological impact, there is significant emphasis on product traceability in export markets among environmentally-aware consumers. There should be an intention to develop long-term sustainability within the craft product supply chain. This may include the development of projects, in collaboration with partner agencies, to support sustainable harvesting and labelling of wood products, research and development of natural fibres and dyes and use of recyclable and reclaimable materials and packaging. Where raw materials and finishes are not locally available, a system of registration of producers should be put in place to enable the identification of legitimate producers and facilitate a system of duty concessions for raw material and packaging imports. In the context of the substantial souvenir trade, there is need for discussions at the level of the Craft Industry Council to determine whether the system will safeguard against the importation of semi-finished goods.

5.2 Production

Jamaica lags behind other countries in the use of small tools and equipment, jigs and fixtures, as well as semi-mechanized craft production and fully automated production. The result is that product finish, quality and delivery are often inconsistent because micro-producers cannot afford the acquisition of appropriate tools and equipment. The labour intensive nature of production also limits supply capacity, reducing the ability to produce in volume. The high exchange rate and significant taxes on small tools, machinery and equipment are also burdensome. While there are clearly markets for one of a kind products, producers of Jamaican craft who are interested in scaling up their production should be facilitated in doing so. A system of incentives comprising import concessions on small tools, equipment, machinery and spare parts for craft production is required to encourage producers to

become competitive with counterparts in other countries. In order to operationalize the system of incentives, a database of producers of Authentic Jamaican craft should be developed, and regular audits conducted in keeping with applications for incentives to ensure that production is maintained in Jamaica.

In general, there is scope for diversification of products produced to offer a wider range of options to the prospective shopper for souvenirs, gifts and decorative items, both in Jamaica and overseas. Product designs for Jamaican craft and their merchandising often lack functionality, customer/market awareness and sophistication. Packaging and labelling are often unattractive, an afterthought or completely absent. There is a need to build capacity in new product development and merchandising through an expansion of current programmes offering service delivery in these areas, training and workshops as well as incubator support. Authentic Jamaican design competitions as well as ‘Pitch’ competitions for start-ups and existing enterprises seeking to accelerate growth can help to identify the fresh talent and new ideas which are well suited for commercialization.

For the Jamaican craft industry to have export potential there is need for greater focus on standards, supply capability, reliability, costing and pricing, branding, labelling and product innovation with the cross-cutting features of quality and consistency. In order to achieve this, the capacity of producer associations has to be strengthened to support the competitiveness of members. There is a poor track record of collaboration to achieve competitiveness in Jamaica, with most clusters being dormant once external funding is withdrawn. Incubator support to micro-business operators is a solution to counter the challenges associated with access to technology to support the design and development of quality craft products, inadequately equipped production facilities or the lack of access by some artists and craft producers to spaces and facilities to produce. Specialized institutional support at a higher level is also required to address improvement in leadership, advocacy and organization among producers and vendors, support the medium term developmental needs of the craft sector as well as better organization and regulation of all areas of the value chain, if the sector is to achieve the potential. Existing structured programmes of support, as offered by JBDC, including intellectual property protection and management, concept redesign for the purposes production, commercialization and distribution services should be provided with the resources for expansion in order to make them broadly accessible to designers and producers island-wide. JBDC’s Mobile Business Clinic Initiative which incorporates workshops and capacity building programmes from Concept to Market could be augmented to include a Mobile Incubator component, with tools and equipment to facilitate the delivery of these services island-wide.

5.3 Wholesale

In general, there are low levels of wholesale supply capability within the indigenous craft sector and it is typically geared more to the production of individual unique items. This is generally a mismatch with the needs and requirements of corporate buyers for multiples or repeat production.

Anecdotal evidence suggests that most craft in the resort area craft markets is imported and that the ‘sameness’ of the items being sold derives from the fact that many vendors are not producers and inventory is sourced from the same wholesale outlets that in turn source from the same suppliers based overseas. In contrast, when average levels of visitor expenditure are taken into account, ex-production prices of authentic Jamaican craft products are relatively expensive. Appropriate market positioning of products is therefore required to support the prices requested from customers. As such, there is a need to encourage more intermediary wholesalers of authentic Jamaican products and develop new marketing channels, in particular, e-commerce. Several past e-commerce initiatives have failed because of inconsistent product delivery, lack of market orientation in products and high transportation costs to destination markets. Nevertheless JBDC’s initial efforts with Things Jamaican’s e-Commerce platform is yielding encouraging results achieving growth year on year. This business model is evolving and it is anticipated that it will include international partners. . The positioning of a lower price point souvenirs should not be the same as a high-value, higher priced item. Overall, there is a need for better awareness of customer segmentation, perception of value, costing and pricing among producers and vendors.

5.4 Retail

There is scope for the expansion in the points of distribution of craft, to include greater sales through airport and cruise ship terminal stores, hotel gift shops, and various visitor attractions as well as through online portals. A collaborative approach needs to be taken towards the effective organization of a regular calendar of shows, pop-up shops and craft fairs, particularly in rural areas, which could also be accompanied by the expansion in the use of agents and distributors. Support could also be provided to the packaging and development of factory and studio tours. Overdependence on direct selling to customers has resulted in less attention being paid to packaging, labelling, branding, effective and appealing product design and consistent quality and pricing by producers. Improved market segmentation of products based on research, is also required to support product offerings. Retailing of high-end traditional craft could also be positioned as part of the cultural experience - offered within cultural sites and attractions. This should be done through a private-public partnership model, which maintains cultural authenticity and standards through an appropriate licensing agreement. Such retail opportunities are however by no means limited, not they should be, to the visitor market. In fact other parallel initiatives targeting other market segments, both local and international, can greatly assist the general upgrade that is required across the industry. The Christmas in July Corporate Gift Showcase, initiated in 2015 and presented for the last 3 years in Kingston to Corporate Gift Buyers is an encouraging example of a successful collaborative effort between MICA (JBDC), MT and the private sector (JHTA and JMA) through the Tourism Linkages Manufacturing Working Group. Participation of designers and artisans in this event has grown exponentially and many are already realising significant income from the inclusion of Corporate Gift Buyers into their customer base.

Tourism is a significant economic opportunity yet there are complaints on the part of producers and vendors concerning the ease of access to hotel retail spaces and direct selling opportunities to

visitors. This is in contradiction to the Master Plan for Sustainable Tourism Development and there may be a need to enforce a system of quotas for local purchases of Authentic Jamaican craft within hotel gift shops, airport stores, cruise ports and retail outlets within resort areas, with a system of monitoring, which may include licensing, to ensure compliance. Alternatively, consideration should be given to providing an appropriate taxation incentive to these categories of retailers who meet specific quotas of purchases of Authentic Jamaican craft, once sufficient supply capacity can be verified as available. There is a need to reorganize craft markets to reflect a multi-dimensional cultural experience with programmes of small, high quality entertainment events (for example mento band performances) and craft demonstrations promoted to visitors and locals to drive traffic to these destinations. An attempt should be made to incorporate traditional Jamaican bakeries and small restaurants within the craft market complexes to drive visitor traffic. These should be developed as private-public partnerships, to enable the Parish Councils to derive revenues which would then be used to upkeep the spaces according to high public health standards.

With respect to airport stores and cruise ship terminals, consideration might be given to incorporating within the terms set out to the operators of these facilities, that space be reserved in its shopping terminals for GOJ-owned and operated outlets such as Things Jamaican Stores/pop-up shops which will aim for broad exposure of the highest quality authentic Jamaican products. A Things Jamaican presence in these facilities managed by JBDC will support invaluable customer feedback and the execution of important research on emerging trends and new opportunities for product and collection development. These stores, as they currently do at the Norman Manley International Airport and the historic Devon House, will also be labs for new product and collection testing with findings from customer feedback informing product design and development and the expansion of markets through e-commerce.

5.5 Consumption

Consumption of craft, visual arts and souvenirs items is generally not viewed as a necessity in the context of modern life. Purchases are generally motivated by a desire to partake in a cultural and artistic experience and/or to obtain a gift or distinctive reminder of travels undertaken to a specific destination. Consumption of craft therefore depends on adequate visibility, cross-cultural promotion of makers and products and ease of unhindered access to products by the prospective purchaser. Appropriate promotional programmes are therefore required on an ongoing basis at the local and international levels in order to sustain the demand for authentic Jamaican craft products, which is in part, a key strategy in leveraging the power of ‘Brand Jamaica’.

Creating new markets and market access with strategic positioning is critical to the viability of the Jamaican craft industry. A disconnect exists between market demand and production which is based on a lack of awareness of customer requirements and purchasing behaviour. Export is a potential opportunity for Jamaican craft products, however, support is required to respond to the demands of new markets, undertake market development and penetration activities. Market access opportunities should be defined through an export marketing strategy and plan and appropriate financing should

also be made available. JBDC, as the former Productivity Centre, led several local and international initiatives which yielded excellent results, the most significant of which was Jamaica's first appearance at the prestigious New York International Gift Show at the Jacob Javits Centre in August 1996, at which over 30 Jamaican producers were represented and which catapulted companies such as Starfish Oils to becoming recognised and viable entities locally and internationally. A regular and continued presence at select international gift and design shows must be a strategic goal of the National Craft Policy, which would necessitate that resources be provided for the in-depth product, collection and business development required to compete successfully in the global context.

More opportunities are also needed to distribute/ sell craft in new spaces such as cultural sites and through e-commerce. There is a need to support brand building and advertising of the current Craft Markets as cultural spaces. Distinctive and exclusive commercial spaces for Authentic Jamaican craft, such as offered currently in the Things Jamaican chain of stores, need to be defined, nurtured, promoted and supported and while imported craft may be a necessary component of a free market system, government should never be active in the promotion of spaces and initiatives which effectively support imported craft. All producers, vendors and retailers of craft need to be educated in the fundamentals of customer service, cross-cultural promotion and export promotion of authentic Jamaican products within the context of the national interest.

5.6 Cross cutting issues

There are also a number of cross cutting issues that affect the craft value chain, as summarized below.

1.1. Expanding products and positioning based on culture and heritage and archiving, preservation and revival of traditional craft skills

The Institute of Jamaica and the African Caribbean Institute of Jamaica/ Jamaica Memory Bank have undertaken some work in archiving, preservation and documentation of traditional craft skills. This work needs to be expanded, showcased and made more accessible to students, craft producers and visitors island wide, as part of the positioning of Jamaica as a country with a tradition of producing craft and an interest in conserving heritage and heritage products. This can also enhance the development of cultural and community based tourism offerings. Among agencies involved in supporting craft development, there is no centralized cataloguing of research done in various areas related to craft and this limits further research to support the sector's development. This could be addressed through discussions at the level of the Craft Industry Council. A consistent recognition system is also necessary to provide awards to master craft producers. This will sustain the interest of youthful potential entrants to the sector.

There is also scope for the upgrading of cultural sites to showcase traditional cultural expressions in craft as a component of culture and heritage. This could include a curated selection of licensed reproductions of national artefacts, whose sale at premium prices, might incorporate a contribution to sustain the national archiving, protection and promotion of authentic historical collections of art

and craft. The influence of craft should be highlighted in public spaces, through sculpture parks and the positioning of craft via displays of products and photos in public spaces, such as ports of entry and exit, the Transport Centre and throughout the media. The hosting of specialized markets and the development of cultural traditions linked various types of craft (e.g. tin, wood, reclaimable materials, clay) and various components of heritage (e.g. Indian, African, Chinese, European), could increase the diversity of product offerings and their appeal to prospective customer segments.

5.6.2 Viability, Incentives and Financing

The viability of businesses in the craft sector is a considerable concern, since, even among established producers operating for several years, profits are reportedly low. Further studies are required to obtain concrete conclusions about viability of the Jamaican craft sector beyond a cultural treasure in relation to business, but there appears to be a need to promote commercial orientation and business knowledge among operators in the sector. The craft sector is also dominated by micro-businesses and support must weigh heavily in favour of tangible support to the growth and development of micro-businesses, through access to appropriate loan and grant financing. Grant financing through public funds should be allocated in a competitive manner to support innovation, business upgrading and competitiveness. Lack of financial support and resources are key challenges for producers and for growth to be achieved in the sector, there is need for revolving working capital financing to support the fulfilment of orders and sustainable funding to enable producers to develop and maintain markets.

5.6.3 Environmental Sustainability

Globally, there is increasing concern among consumers about ecological awareness and environmental intelligence in the making and sale of products. There appears to be very little awareness of this market demand among producers, sellers and promoters of craft in Jamaica, thereby the value of product offerings are reduced in the eyes of prospective customers. It is important to view the future of the craft industry in terms of medium term environmental sustainability and ensure that products and packaging reflect environmental consciousness through training in product development and awareness campaigns.

5.6.4 Institutional Support, Sector Regulation and Governance

The Jamaican craft sector has suffered significant damage from the scale of importation of similar craft products; mass produced imports, which although cheaper, but may not necessarily be of good quality. These are more readily available to prospective consumers than similar locally made products. It is widely perceived that there are too many craft vendors versus artisans and that the purchase of local craft is associated with unpleasant and undesirable buying experiences. Stakeholders opine that there are too many informal operators in the sector and there is need for an appropriate system of licensing and registration to support the wider economy through the payment of taxes and fees. Certain obstacles, such as the inability of artisans to work to corporate business practices and a lack of financing support to the sector, are best addressed through a common and centralized approach to communication and advocacy. The Jamaican craft sector has no organized

structure as a focal point for the sector. The fragmented nature of the industry is in part related to the lack of a coordinated approach to governance through a central coordinating body. The development of the craft industry requires ‘joined up government’. The Government of Jamaica, through MICAF as the lead Ministry, must move decisively to provide appropriate institutional support, sector regulation and governance to create a sustainable industry. This is consistent with global practices, which recognize the need to provide specialized institutional support and structured programmes to address the development of traditional and contemporary craft and its adaptation to changing consumption patterns and market conditions.

5.6.5 Education, Training, Skills Enhancement and Capacity Building

The attitude and mind-set, the overall stigma attached to craft and craft production needs to change if the sector is to seem attractive for new players. Evidence of this stigmatization is present in the lack of recognition, value and respect accorded to craft, where craft is seen as an alternative, not a first choice as a credible and viable profession or career, values for skill, business and investments. There is need for a fresh approach, which includes tangible opportunities which can inspire the young to make an input to the sector. Greater levels of technical and vocational skills and entrepreneurial ability are required to support the growth and development of a sustainable craft sector in Jamaica. Many artisans have a lack of interest and understanding of quality from the perspective of market requirements and there is a significant disconnect between approaches to product development and customer-oriented marketing. There is also a lack of curiosity in relation to culture and history and a lack of capacity to adapt traditional designs to capture market interest. In the interest of developing cultural industry, there is also a need to rescue dying craft skills. Where structured product development programmes have been put in place, there has been an over-reliance on external support to develop the local skills and industry and there needs to be a greater commitment to supporting the creation of locally based design talent through the nurturing, training and ongoing career development of local craft designers. All of these issues can be addressed through a programme of education, training, skills enhancement and capacity building.

Producers report difficulty in finding good quality workers or persons who are interested in learning a craft skill while there are concerns among training institutions and their students related to employment viability after training. Mentoring and apprenticeship systems may offer possible solutions. It is widely viewed that a more focused and organized approach to training is required and there is a need to revamp craft education as well as the need for an alteration of the approach and perception of craft in schools. Lack of a comprehensive approach to educational offerings at the early childhood, primary, secondary and tertiary levels to support the development of an interest, appreciation and competency in relation to creating work by hand is seen as a significant obstacle affecting the development of craft as a sustainable industry. This is because inclusion of arts and arts-based methodologies in the education system within and across curriculum (as opposed to on an extra-curricular basis) is critical to the development of artistic skills and creativity. Improving the status and visibility of the artisans and craft persons in society will also improve the appetites for developing careers in the industry. Therefore, to buttress the business development program of the

Jamaica Business Development Corporation (JBDC), emphasis should also be placed on the linkage between the Craft sector and the Edna Manley College for the Visual and Performing Arts, and the University of Technology Jamaica's Design and Entrepreneurial Centre for the promotion of greater innovation in craft production and design, as well as, with the Scientific Research Council regarding preservation and protection of natural materials used in craft production.³²

5.6.6 Increased linkages with agriculture, tourism, ICT, Energy and other economic sectors

The general lack of data and information about the craft sector and the existing/ potential economic linkages with other sectors is an obstacle to major growth and development. There is concern for the uncertainty in relation to where certain raw materials such as wood and fibres are being harvested locally and whether significant illegal harvesting in relation to forestry will pose future challenges to the environment. It is important to undertake focused research to generate a list of plant species used in the craft industry and to simulate the potential future effects of climate change. Development of a robust supply chain through planned cultivation, sustainable harvesting and testing of indigenous materials, including plant fibres such as bamboo, cotton, wicker and sustainably harvested woods could be a transformational contribution to a globally competitive craft industry.

More predictable access to the markets for gift and decor purchases related to the tourism industry, could sustain increased employment, foreign exchange savings and GDP growth. However, this must be handled in a sensitive manner, given Jamaica's international commitments to trade and investments. The creation of an incentive system through tangible benefits such as taxation relief, to encourage retailers to promote authentic Jamaican craft and for interior designers to use Jamaican craft objects in their décor, is highly recommended. Producers and vendors of craft must increase their awareness and strategic use of ICT (including e-commerce and social media) as well as energy in order to sustain globally competitive businesses. Given the innovative nature of these undertakings, a structured pilot programme of awareness building and support should be targeted to major producers and vendor groupings.

5.6.7 New Product Development and Innovation in Authentic Jamaican products

In saturated markets for craft, the capacity to innovate and undertake rapid new product development in line with market research and the expectations of the customer is a key component of sustainable competitive advantage. Stakeholders have indicated that Jamaican craft products are generally lacking in branding, labelling, packaging and value for money and the quality and consistency of locally produced goods is viewed as low, hence the value for money is limited and does not typically justify the price. Insufficient research is being done in the uses of recycled material, for example, plastic. Product lines display a lack of narratives which could link them to the local context and therefore provide value in the eyes of collectors of unique craft, visual art and souvenirs. The system to screen ideas for success in the marketplace, commercialize innovations and convert them into

³² The National Policy on Culture and Creative Economy of Jamaica 2017-2027: Toward the Enhancement and Promotion of Brand Jamaica, pg 102

tangible wealth is also lacking in the craft sector, and needs to be expanded. These issues can be addressed through ongoing, structured programmes to support new product development and innovation in authentic Jamaican products. In addition to the product level, innovation is also possible at the levels of process, business models, distribution and customer satisfaction, so the scope of the programme should be inclusive of these elements. In the area of merchandising, retailing and visibility, stakeholders have highlighted the typical dependence of vendors on cash based payment systems, poor marketing and merchandising approaches and face-to-face selling techniques as areas for potential improvement.

5.6.8 Enforcement of Intellectual Property Rights and Consumer rights and protection

Stakeholders have identified major challenges in intellectual property infringement linked to copying of designs among producers, sale of counterfeit designer products, low levels of usage of strategic IP protection for creative products and a general lack of understanding of the intellectual property system. Structured awareness building and capacity building to support awareness, registration, management and enforcement of intellectual property is required to address these issues. There are also significant challenges to the unsuspecting customer in purchasing imported souvenir items which are mislabelled with Jamaica as the country of origin or presented in a manner which is misleading in suggesting that an imported item could be a locally made gift or souvenir. Standards for labelling and packaging of craft need to be developed to ensure that the identities of items made in Jamaica are protected from unfair competition and the awareness of these standards must be supported through public education campaigns. Firm action need to be taken against unlawful importation of counterfeit Jamaican craft, ensuring that the legal framework governing consumer rights and protection must be upheld.

5.7 Critical success factors in implementing a Craft Policy

- Specialized institutional support to oversee measurement, monitoring and evaluation of the sector and support provided to key players, multi-agency cooperation, support the medium term developmental needs of the craft sector as well as implementation of structured programmes to address the development of craft in Jamaica and improvement in leadership, advocacy, capacity building and organization among producers and vendors.
- Educate producers, vendors and retailers of craft in the fundamentals of customer service, cross-cultural promotion and export promotion of authentic Jamaican products within the context of the national interest.
- Archiving, preservation and documentation of traditional craft skills
- Recognition system to provide awards to master craft producers
- The influence of craft should be highlighted in public spaces, through sculpture parks and the positioning of craft via displays of products and photos in public spaces, such as ports of entry and exit, the Transport Centre and throughout the media.
- Host specialized markets and the development of cultural traditions linked to various types of

craft (e.g. tin, wood, reclaimable materials, straw, clay) and various components of heritage (eg. Indian, African, Chinese, European), could increase the diversity of product offerings and their appeal to prospective customer segments.

- Development of a system of licensing to include all producers, vendors and retailers. A system of registration of producers should be put in place to enable the identification of legitimate producers and facilitate a system of duty concessions for raw material and packaging imports. A database of producers of Authentic Jamaican craft should be developed, and regular audits conducted in keeping with applications for incentives to ensure that production is maintained in Jamaica. Retailers need to be registered to facilitate monitoring and measurement of the sector and administration of incentives for the sale of Authentic Jamaican craft.
- The creation of an incentive system through tangible benefits such as taxation relief, to encourage local, regional and global interior designers to use Jamaican craft objects in their décor
- Develop long term sustainability within the craft product supply chain through encouragement of research and experimental pilot programmes involving the use of indigenous raw materials, recyclable and reclaimable materials and sustainable harvesting of plant materials and non-timber forest products
- Support the use of small tools and equipment, jigs and fixtures, as well as introduction of various levels of technology, semi-mechanized craft production and fully automated production in order to improve product finish, quality and delivery and supply capacity through the development of incubators and a system of incentives comprising import concessions on small tools, equipment, machinery and spare parts for craft production in order to encourage producers to become competitive with counterparts in other countries
- Build capacity in new product development and merchandising through an expansion of opportunities in training, workshops and incubator support. Authentic Jamaican design competitions should be held regularly to identify the best prospects for commercialization and a structured programme of support including intellectual property development, redesign for production, commercialization and distribution services should be available for designers and producers to access.
- Strengthen the capacity of producer associations to support the competitiveness of members
- Encourage the expansion of the points of distribution of craft, to include greater sales through airports and cruise terminals (including Things Jamaican stores/pop-up shops), hotel gift shops and through online portals, while creating the necessary linkages with the tourism sector to facilitate connection, networking and marketing support
- Encourage better and more consistent organization of a regular calendar of pop-up shops and craft fairs to increase sales of authentic Jamaican craft, including in rural areas; provide support to the packaging and development of craft factory and art studio tours.
- Support the retailing of high-end traditional craft as part of the cultural experience offering within cultural sites and attractions. This should be done through a private-public partnership model, which maintains cultural authenticity and standards through an appropriate licensing agreement.

- Establish Artisan Villages to reflect a multi-dimensional cultural experience with programmes of small, high quality entertainment events (for example mento band performances) and craft demonstrations promoted to visitors and locals to drive traffic. Support the advertising and promotion of the Artisan Villages as cultural spaces. An attempt should be made to incorporate traditional Jamaican bakeries and small restaurants within the craft market complexes to drive visitor traffic. These should be developed as private-public partnerships, to enable the Parish Councils to derive revenues which would then be used to upkeep the spaces according to high public health standards.
- Support appropriate promotional programmes in order to sustain the demand for Jamaican craft products; encourage the creation of new markets and market access with strategic positioning, including export markets; provide support for producers to respond to the demands of these new markets, undertake market development and penetration activities. Market access opportunities should be defined through an export marketing strategy and plan and appropriate financing should also be made available. Encourage e-commerce among artists and craft persons and enable JBDC to have an export marketing strategy and its current e-commerce platform and the supporting logistics to reach more foreign markets.
- Provide the required resources to support the expansion of the Things Jamaican brand internationally with a franchising model.
- Promote commercial orientation and business knowledge among operators in the sector.
- Enable grant financing to support innovation, business upgrading and competitiveness, revolving working capital financing to support the fulfilment of orders and sustainable funding to enable producers to develop and maintain markets.
- Encourage ecological awareness and environmental intelligence in the making and sale of products and their packaging reflect through training in product development and awareness campaigns.
- Support education, training, skills enhancement and capacity building to upgrade and certify technical and business skills, improvement in levels of technical and vocational skills and entrepreneurial ability
- Develop a structured pilot programme of awareness among producers and vendors of craft, to increase their awareness and strategic use of ICT (including e-commerce and social media) as well as energy in order to sustain globally competitive businesses.
- Create a programme to screen and incubate ideas for success in the marketplace, commercialize innovations and convert them into tangible wealth and ongoing, structured programmes to support new product development and innovation in authentic Jamaican products at the product level and at the levels of process, business models, distribution and customer satisfaction.

6. NATIONAL CRAFT POLICY FRAMEWORK

6.1 VISION STATEMENT

The vision of the National Craft Policy and Strategy of Jamaica is a viable, sustainable, diversified and internationally competitive craft industry, showcasing authentic, innovative and high quality Jamaican products while sustaining livelihoods, leveraging the inherent creativity in cultural expression of the Jamaican people and enhancing the value of the national brand, within a dynamic, enabling environment for its development.

6.2 GOALS

- 6.2.1 To develop a streamlined and rationalized sector, positioned for growth, expansion, increased employment and contribution to national earnings through appropriate institutional support, incentives and sustainable financing;
- 6.2.2 To protect traditional cultural expressions based on culture and heritage through structured interventions, including but not limited to, support for branding and intellectual property protection;
- 6.2.3 To strengthen the institutional structures that promote craft innovation through improved training programmes, research and development;
- 6.2.4 To create an appropriate enabling environment for the development and production of new authentic Jamaican craft, visual arts and souvenir products through the implementation of standards and support systems for growth in new product and market development;
- 6.2.5 To enhance revenue streams and profits of legitimate craft producers and vendors through expanded customer access, increased customer satisfaction, quality, product variety, customer-centric market spaces and value for money;
- 6.2.6 To develop the craft value chain, for authentic and innovative Jamaican craft, by increasing quality and opportunities for commercialization in an environmentally sustainable manner through the expansion of linkages with other economic sectors.

6.3 PRINCIPLES AND VALUES

The following principles are enshrined in the National Craft Policy and Strategy of Jamaica.

Values	Principles
<ul style="list-style-type: none"> • Respect, acceptance and tolerance 	Acceptance of diversity in cultural and artistic expression
<ul style="list-style-type: none"> • Inclusiveness and fairness 	Foster fairness, equity, transparency and inclusiveness of all stakeholders in the development and growth of craft
<ul style="list-style-type: none"> • Sustainable development 	Commitment to a craft industry that supports social, economic, environmental and cultural sustainability
<ul style="list-style-type: none"> • Trust and Partnership 	Encourage an environment of trust, networking, and collaboration and community growth and development
<ul style="list-style-type: none"> • Innovation 	Promote sustainable and forward thinking value-added initiatives that enhance Jamaican craft design

	and production
<ul style="list-style-type: none"> • Quality and consistency 	Support craft production at consistently high standards related to product and service delivery
<ul style="list-style-type: none"> • National commitment 	Preservation of national interest, cultural integrity and the Jamaican brand

6.4 OBJECTIVES AND STRATEGIES TO ADDRESS POLICY ISSUES

Goal 1: To develop a streamlined and rationalized sector, positioned for growth, expansion, increased employment and contribution to national earnings through appropriate institutional support, incentives and sustainable financing

Global experiences indicate that dedicated and specialized institutional support for craft development provides the mechanism required to engage all players in protecting cultural traditions and maintaining industry viability in the face of intense pressures to maintain identity in the face of globalization and competition from imports.

In Jamaica, the establishment of a Craft Industry Council by the portfolio Minister, will support the oversight of the orderly development of Jamaica’s craft sector. The Ministry will, through its respective agencies and in partnership with other MDAs, be responsible for the design and implementation of systems to enable research and data collection, undertaking registration and regulation of industry players, implementing targeted programmes of assistance and support and manage the administration of a system of incentives and financing, which will be provided to achieve specific outcomes.

Such oversight will help to alleviate the challenges facing the industry, such as the operation of Craft Markets (a responsibility which rests with TPDCo), including defining the roles and responsibilities for upkeep and development among various agencies, e.g. the Parish Councils and the tenant vendors.

Key Policy Issues

- Institutional Support, Sector Regulation and Governance
- Education, Training, Skills Enhancement and Capacity Building
- Viability, Incentives and Financing
- Increased linkages with agriculture, manufacturing, mining, culture, tourism, ICT, Energy and other economic sectors

Goal 1: Objectives: Institutional Support

- To provide institutional support for the further development, governance, regulation and growth of the Jamaican craft sector nationally and internationally

- To facilitate ongoing capacity-building, training and development of authentic Jamaican craft industries
- To design, implement and administer incentives for the development of the craft value chain locally that are consistent with, but not limited to the provisions of the Fiscal Incentives (Miscellaneous Provisions) Act , 2013 and stimulate new investment, employment and earnings in the craft and tourism industries
- To provide guidance for the development of national programmes concerning the craft sector in line with the goals of sustainable development
- To streamline financial support from government and other agencies towards social development and infrastructural improvement within the craft sector
- To monitor the implementation of the National Craft Policy and Strategy, measure the resulting outcomes from implementation and provide periodic review and adjustments to the policy framework as required.

Goal 1: Strategies:

- The execution of GOJ-funded baseline and demand and supply studies of the craft industry to capture most current information on stakeholders, products, materials along the value chain
- Support institutional strengthening consistent with the JBDC's mandate and existing Strategic Plan through the development of inter-agency MOUs outlining roles and responsibilities in policy implementation
- Expand the current training platform including the Mobile Business Clinic element to support craft industry development from concept to market. JBDC will collaborate with HEART, the Edna Manley College of the Visual and Performing Arts, UTech and others as necessary.
- Following on baseline research, the design and implementation of a system to identify all legitimate players in the craft industry along the value chain and ensure their compliance with business registration and practices.
- Identify master craft producers to be registered with MCGES and supported in the development of their enterprises and the transfer of knowledge and skills to the youth.
- Design and implement a fair and transparent system of incentives for craft development, consistent with, but not limited to, the provisions of the Fiscal Incentives (Miscellaneous Provisions) Act , 2013 including small grants for export development and exhibitions, Authentic Jamaican competitions, small equipment and machinery duty concessions, concessions on inputs, system of quotas or incentives for sale of Authentic Jamaican craft for retailers; refurbishing of unused spaces to support craft production and sale, strategies and incentives to promote and support use of craft in Jamaican interiors and public spaces
- Develop a programme of capacity building for producer and vendor associations to establish sustainable management frameworks to support advocacy, self-governance and implementation of policy objectives
- To provide guidance for the development of national programmes concerning the craft industry in line with the goals of sustainable development

- To streamline financial support from government and other agencies towards social development and infrastructural improvement within the craft industry
- To monitor the implementation of the National Craft Policy and Strategy, measure the resulting outcomes from implementation and provide periodic review and adjustments to the policy framework as required.

Intended results

- Enhanced business environment to support increased upgrading, employment, revenues to stakeholders and new investments
- Increased and permanent support for registered enterprises operating within the sector
- Improved monitoring and measurement of the economic and social impact of the sector
- Revitalization of the sector and the national interest in authentic Jamaican products
- Increased human and institutional capacity to manage growth and development of the sector
- New incentives for all players in the sector, to increase the sustainability of livelihoods and businesses, local retention of value and increased investment in Jamaican products, artisans and craft related businesses.

Goal 2: To protect traditional cultural expressions based on culture and heritage through structured interventions, including but not limited to, support for branding and intellectual property protection

Traditional cultural expressions in craft are the result of skills that have been handed down from generation to generation and can be linked to national heritage. Wherever possible, these expressions and their waning skills should be archived and preserved for the benefit of all Jamaicans including future generations and showcased as a component of national heritage and cultural tourism. It is also important to create and maintain public recognition systems to benefit the status of the artist and master craft persons as icons in the conservation of culture and heritage. Craft as traditional cultural expression also requires marketing and promotion in collaboration with communities, with respect for the power and the influence of culture and traditions, in order to sustain the livelihoods of the artisans

Key Policy Issues

- Expanding products and positioning based on culture and heritage and archiving, preservation and revival of traditional craft skills
- Production
- Consumption
- New Product Development and Innovation in Authentic Jamaican products
- Enforcement of Intellectual Property Rights and Consumer rights and protection

and craft persons involved. The organization and promotion of specialized markets, highlighting cultural traditions, provides an appropriate showcase for these special types of craft and opportunities for cultural and community tourism.

Goal 2: Objectives: Craft as Culture and Intellectual Property Protection

- To identify, preserve, protect and promote traditional cultural expressions in the context of culture and heritage
- To empower traditional communities to be aware of their traditional expressions related to craft and protect their IPRs and their traditional expressions related to craft
- To preserve traditional skills, rescue waning skills and engage new audiences
- To promote viable economic activities with traditional craft in consultation with producer communities
- To strengthen the cultural and community tourism offerings of Jamaica

Goal 2: Strategies:

- Using a method similar to the Japanese One Product One Village model, identify the retention of craft- based cultural expressions, Taino and other heritage expressions and typical flora and fauna in each parish across the country and their potential for intellectual property protection.
- Design and implement a programme to develop the craft traditions of each parish into market ready items.
- Facilitate transmission workshops where traditional craft techniques can be shared and passed on to younger generations.
- Development of craft replicas of traditional artefacts under the supervision of the IOJ.
- Hosting of product development workshops and specialized markets and the development of cultural traditions linked various types of craft (e.g. tin, wood, reclaimable materials, straw, clay, semi-precious stones) and various components of heritage (e.g. Indian, African, Chinese, European), could increase the diversity of product offerings and their appeal to prospective customer segments.
- Encourage the registration of IPRs related to craft brands, GIs and designs.
- Identification of communities with prospects to operate thematic attractions and tours.
- Facilitate the development of tours as a component of the community tourism model and related product development in collaboration with the communities.
- Develop an appropriate licensing and certification system to protect the authenticity of these tours, maintain the standard of quality and enable promotion as part of the national tourism offerings.
- Training of stakeholders for self-governance and management of tours and economic opportunities
- Identification of communities with prospects to operate thematic attractions and tours and related product development in collaboration with the communities

- Establishment of Artisan Villages to feature live demonstrations of craft production as a basis for entertainment and custom produced goods
- Identify the prospects for training of communities to operate thematic attractions focused on demonstrating these traditional processes, based on their history and context, sale of craft replicas of traditional objects and promotion of tours as a component of the community tourism model.
- Develop an appropriate licensing and certification system to protect the authenticity of these tours, maintain the standard of quality and enable promotion as part of the national tourism offerings.
- Training of stakeholders for self-governance and management of tours and economic opportunities
- With the full engagement of stakeholders, conduct an audit aimed at identifying distinctive and exclusive market spaces for Authentic Jamaican craft in the form of artisan villages, existing attractions, new retail sites, kiosks within cultural sites and/or community based sites where high quality tours can be developed to showcase traditional expressions in context, while promoting other Jamaican cultural offerings such as cuisine and entertainment.

Intended results

- Preservation and promotion of traditional cultural expressions in the context of Jamaican heritage
- New opportunities for sale of craft, development of cultural attractions and community based tourism to increase earnings from tourism and their distribution island wide
- New and quality market spaces for authentic Jamaican craft
- To achieve protection by means of registration of IPRs of producers and vendors of authentic Jamaican craft

Goal 3: To create an appropriate enabling environment for the development and production of new authentic Jamaican craft, visual arts and souvenir products through the implementation of standards and support systems for growth in new product and market development

In order to increase the earnings from craft, visual arts and souvenirs, ad-hoc support must be replaced with a structured and systematic eco-system of production of market-ready authentic Jamaican craft; capable of sustaining itself and maintaining the interest of consumer markets. The role of policy is to create an enabling environment for this industry (or eco-system) to develop and thrive in a sustainable manner.

Key Policy Issues

- Production capability and capacity
- Wholesale supply capability
- Institutional Support
- Training, Skills Enhancement and Capacity Building
- New Product Development and Innovation in Authentic Jamaican products
- Enforcement of Intellectual Property Rights and Consumer rights and protection

Goal 3: Objectives: Incentives

- Identify and support the registration of legitimate producers of Jamaican craft, visual art and souvenirs in order to provide the necessary support and assistance to improve products and market opportunities
- To create a demand-led and responsive production-oriented environment, which encourages the production of Jamaican-made craft, visual arts and souvenirs and increases the visibility and promotion of these products to visitors, corporate procurement and export markets in order to reduce the importation of craft products and increase the sales of Jamaican made items.
- To support human capacity development and increased access to opportunities for employment and entrepreneurship; particularly among micro and small enterprises in the craft sector

Goal 3: Strategies:

- Facilitate the expansion of JBDC's gift and craft development programme to offer comprehensive workshops and classes to existing and new artisans in traditional handicraft, new designs and new methods of construction. Entrepreneurship development and hands-on training will be offered island wide to develop skills and transferable knowledge to support the viability of the craft industry.
- Expand existing product assessment and producer rating system nationally for producers island-wide based on competency, ability to produce both quality and quantity in a sustainable manner, with regard to recommended criteria reflecting traceability and environmental/ecological awareness. This expanded national rating system will establish a priority index for participation in government sponsored promotional activities such as trade fairs, exhibitions, export development initiatives
- Identify and register producers of authentic Jamaican craft, visual arts and souvenir products and develop an information database identifying details of business, inputs/raw materials, products, processes and markets (actual and potential). The registration process should be linked to the provision of opportunities, including producer's rating as a criterion to access government technical and marketing assistance support and incentives
- Expand the system of business and technical incubation support for craft micro-enterprises, including the inclusion of mobile and online elements making it accessible island-wide. Technical incubation support should enable appropriate production support for rapid commercialization of authentic Jamaican craft, visual arts and souvenir products. Business incubation support should facilitate access to grants for new product development and innovation and loan financing for viable businesses. Enterprises and producers who are not ready for incubation should receive guidance and support to improve products and access markets in accordance with their goals

- Implement a calendar of technical assistance and capacity building, training and short workshops to provide exposure to new product development, product finishing, business management, energy efficiency, tourism awareness, customer service and any other areas of need identified to artisans, vendors, community groups and associations.
- Create a programme of upgrading of export potential through greater focus on training in relation to standards, supply capability, reliability, costing and pricing, branding, labelling and product innovation with the cross-cutting features of quality and consistency.
- Encourage the formation of producer associations and cooperatives as non-profit organizations and undertake capacity building to strengthen the associations in order to support the competitiveness of members
- With the support of the BSJ and drawing on experience of the JBDC in product and producer assessment, create a minimum set of product standards for the guidance of producers and importers
- Develop a labelling standard for craft items which addresses the practice of misleading and deceptive labelling of country of origin among imports
- Configure a sub-Committee of stakeholders to discuss the issues pertaining to importation of craft and take actions within the legal framework to eliminate misleading and deceptive practices

Intended results

- Registration of all producers and rating of capacity and quality
- Improved quality and export orientation in products through standards and training
- Improved sustainability in craft businesses through technical and business incubation
- human capacity development
- Development of reliable supply chains and increased competitiveness of authentic Jamaican craft
- Grant support for new product development and innovation, loan financing for viable businesses
- Improved capacity of producer associations to upgrade competitiveness of members
- Improved labelling of craft products

Goal 4: To enhance revenue streams and profits of legitimate craft producers and vendors through expanded customer access increased customer satisfaction, quality, product variety, customer-centric market spaces and value for money

Delivering value for money in attractive products and experiences, closely targeted to the customer, while offering quality and product variety is important in order to attract and maintain customer bases and sustain viability in craft businesses. It has been estimated that just under 10,000 persons are employed in craft related trades and production (STATIN), while just under 2,000 traders operate in resort areas alone (TPDCo). Additional employment is created through retail outlets and Craft

Markets outside of resort areas. Targeted actions aimed at enhancing revenue streams and profits of producers and vendors can therefore have significant impact on livelihoods and the wider economy.

Key Policy Issues

- Retail
- Consumption and marketing
- Expanding products and positioning based on culture and heritage
- Increased linkages with agriculture, tourism, ICT, Energy and other economic sectors
- New Product Development and Innovation in Authentic Jamaican products

Goal 4: Objectives: Craft Market Transformation, Artisan Villages- Revenues and Earnings

- To develop Artisan Villages
- To expand the points of distribution of authentic Jamaican craft, to include greater sales through hotel gift shops and through online portals
- To expand and further develop the capacity for market research and market intelligence on purchases of craft, export potential and how to link the demands of the market with the existing and future capacity of local producers

Goal 4: Strategies:

- Develop Artisan Villages to reflect a multi-dimensional cultural experience with programmes of small, high quality entertainment events (for example mento band performances) and craft demonstrations promoted to visitors and locals to drive traffic. Based on the packaging of a private-public partnership investment agreement, an attempt should be made to incorporate traditional Jamaican bakeries and small restaurants within the craft market complexes to drive visitor traffic and increase the potential earnings of the Parish which would then be used to upkeep the spaces according to high public health standards.
- Expand the current capacity of the JBDC, building on their experience in craft development, to have an export marketing strategy, including the establishment of Things Jamaican stores/pop-up shops in airports and cruise ship terminals, an augmented e-commerce platform and logistics to reach foreign markets and the roll-out of a Things Jamaican franchising model.
- To obtain improved market segmentation of products based on research; to expand and further develop the capacity for market research and market intelligence on purchases of craft, and identify how to link the demands of the market with the existing and future capacity of local producers.
- Develop a formal linkage programme to expand local purchases by retailers, including gift shops and vendors and encourage production in line with market demand for both local (tourist and corporate) and export markets.
- Create electronic catalogues and a web enabled platform to enable promotion of authentic Jamaican craft, visual arts and souvenir products.

- Develop a calendar of promotional events, fairs, festivals, markets and trade shows, locally and overseas and establish criteria for participation based on excellence rating.
- Organization of a regular calendar of pop-up shops and craft fairs, particularly in rural areas.
- Undertake a programme to provide support to partnership models for the preparation and development of factory and studio tours of artisans.

Intended results

- Increased revenues for formal and informal craft producers through increased sales
- Increased sophistication in craft product offerings
- Expanded focus on market research, market information and market intelligence
- Improved support for demand-led and market oriented production
- New investment at all levels of the value chain
- Reorganization and upgrading of redundant craft market models to present cultural shopping experiences
- E-Commerce activity to reflect the authentic Jamaican brand
- Structured and systematic promotion of authentic Jamaican craft
- New tourism offerings of factory and studio tours

Goal 5: To develop the craft value chain for authentic and innovative Jamaican craft, by increasing quality and opportunities for commercialization in an environmentally sustainable manner by the expansion of linkages with other economic sectors.

Development of the craft value chain is the only way to increase the retention of value locally and counter the intense competition from imports, which is typical of modern globalized and liberalized market conditions. The value proposition is centred on human capacity development; enhanced research and development; commercialization of unique and distinctive quality products made from indigenous materials and expanded linkages with other sectors.

Key Policy Issues

- Input supply
- Environmental Sustainability
- Increased linkages with agriculture, tourism, ICT, Energy and other economic sectors
- New Product Development and Innovation in Authentic Jamaican products

Goal 5: Objectives: Commercialization and Linkages

- To support increased use of available local materials, including natural fibres and natural dyes and recyclable and reclaimable materials in products
- To enhance the environmental sustainability and therefore sophistication and export potential of the Jamaican craft industry
- To improve packaging, labelling, branding, effective and appealing product design and consistent quality and pricing by producers

- To expand the merchandising, retailing and visibility of authentic Jamaican craft, visual arts and souvenir products
- To expand the linkages between craft and other sectors, in particular growth sectors, including energy and ICT

Goal 5: Strategies

- Develop programmes to encourage energy awareness among producers, vendors and retailers, reduction of waste and environmental sustainability, use of the internet and ICT technologies to enable production efficiencies, networking and marketing.
- Undertake a survey to identify the origin of raw materials being used in the craft industry and determine the extent to which sustainable harvesting of wood and fibres is being used and the current overall environmental footprint of the craft industry
- Develop projects and programmes to support sustainable harvesting and labelling of wood products, research and development of natural fibres and dyes and use of recyclable and reclaimable materials and packaging, in collaboration with partner agencies,
- Support research and development programmes with an emphasis on promoting innovative product design and production
- Develop and implement a national programme to provide incubator support to the branding, packaging, labelling and certification of authentic Jamaican craft, visual arts and souvenir products including the promotion of fair trade and fair labour standards, along with the appropriate marketing campaigns to underscore the value proposition of the offering
- Develop regular public competitions and showcases to identify and promote authentic Jamaican craft, according to specific criteria including designs, best use of local materials, innovation and price and other factors, to reward competitiveness and innovation among producers
- Identify prospects for export promotion of Jamaican craft and create an action-oriented export strategy and programme of support for export development

Intended results

- Training and upgrading of artisans, vendors, community groups and business associations in relation to environmental and energy awareness
- Certification programme to identify authentic Jamaican craft according to specific criteria
- Support to authentic craft producers to improve branding, packaging and labelling of products
- Reduced environmental footprint of the craft industry
- Increased use of locally available materials and environmental friendliness of products
- Increased visibility of and support for authentic Jamaican craft
- Expanded focus on market research and market intelligence and greater market-orientation of products, expansion of demand-led production
- Expanded earnings from tourism via a structured linkages programme
- Structured export marketing programme and increased earnings from export

7. IMPLEMENTATION PLAN

7.1 Key Stakeholders and Roles

Ministry of Industry, Commerce, Agriculture and Fisheries (MICAF)

The Ministry of Industry, Commerce, Agriculture and Fisheries is responsible for agriculture and industry development as well as maintaining an enabling business environment. MICAF has been assigned portfolio responsibility for the development of the craft industry and therefore has responsibility for the implementation of the Craft Policy. The Ministry, has a number of key agencies within its portfolio, with mandates impacting craft sector development. These include the Jamaica Business Development Corporation (JBDC), the Jamaica Intellectual Property Office (JIPO), the Bureau of Standards Jamaica, the National Compliance and Regulatory Authority, the Department of Cooperatives and Friendly Societies, Rural Agricultural Development Authority, the Trade Board and the Consumer Affairs Commission.

Ministry of Tourism (MT)

The Ministry of Tourism through its agencies, the Tourism Enhancement Fund (TEF), Jamaica Tourist Board (JTB) and the Tourism Product Development Company Limited (TPDCo) will provide support to the implementation of the National Craft Policy and Strategy of Jamaica, and closely collaborate with respect of Artisan Villages. Additionally, through its Tourism Linkages Shopping Network it will provide critical support to research to be executed with respect to the Demand Study for Craft.

The Ministry of Culture, Gender, Entertainment and Sport

The mandate of the Ministry of Culture, Gender, Entertainment and Sports includes the enhancement of Brand Jamaica through the revision of the Cultural Policy and creation of a Cultural Industries framework for the enhancement of the economic contribution and the creative industries to the national economy.

Through its Culture Agencies, the Institute of Jamaica (and its seven Divisions); the Jamaica Cultural Development Commission; the Jamaica National Heritage Trust; the National Library of Jamaica; the Jamaica National Commission for UNESCO; and the Creative Production and Training Centre, the Ministry will be a key partner in among other areas, implementing policy, providing advice on the cultural aspects of supporting traditional cultural expressions in authentic Jamaican craft and cultural tourism experiences and providing training opportunities to diverse stakeholders. The Ministry will also provide leadership on issues pertaining to cultural communities and youth engagement in policy implementation.

The National Cultural and Creative Industries Council

Oversight by the Ministry of Culture will also come through the National Cultural and Creative Industries Council mandated to support Creative Economy facilitation, as a component of planned development. One task of the Council is to undertake the development and implementation of a Policy and Master plan for Cultural and Creative Industries within two years. Additionally, the NCCIC has been tasked with the implementation of the recommendations laid out in the recently completed Business Plan for the Cultural and Creative Industries.

Ministry of Local Government and Community Development

The Parish Councils are the local and community development Secretariats for the Government of Jamaica and are responsible for the operation and management of several craft markets. They will be key partners in the transformation of craft markets into cultural shopping experiences through public-private partnerships. The Social Development Commission (SDC) is the principal community organization agency working in the interest of advancement in the areas of social & economic development. It is recognized that the SDC, along with the JCDC has a long history of involvement in craft development in Jamaica. Accordingly, the SDC in collaboration with the JCDC will be key partners in the implementation of the craft policy among communities, particularly in rural areas.

Ministry of Transport and Mining

The Ministry of Transport and Mining provides the leadership and the enabling activities which deliver, in a safe and environmentally sustainable manner, an integrated and efficient transport system that serves the diverse needs of all users and a minerals sector that optimizes the value of the resources extracted and processed. MTM is an important strategic partner in the implementation of the National Craft Policy with respect to affording space in international airports and other ports of entry (cruise ship terminals) for the retailing of Authentic Jamaican-made gifts and crafts in the form of Things Jamaican retail stores and pop-up shops. Further, its current role as an implementation partner for the development minerals sector along with JBDC, UWI and MoT is an example of the value chain development and management approach recommended for the craft industry.

Ministry of Finance and the Public Service

The Ministry of Finance & the Public Service (MOFP) has overall responsibility for developing the Government's fiscal and economic policy framework; collecting and allocating public revenues and creating a society in which each citizen has every prospect of a better quality of life. The MOFP is a key advisory partner in the design of an incentive system to support craft development in Jamaica.

Craft Industry Council

The Council will be appointed by the portfolio Minister as an advisory inter-agency body comprising various government ministries (to include tourism and ministry responsible for culture),

agencies and private sector representatives, tasked to create effective governance, operational, technical and infrastructural framework that will strengthen the craft industry and facilitate sales, promotion and marketing of craft locally and internationally. The Secretariat for the Council will be located within the Ministry or a designated agency. The Council will provide guidance and support to policy implementation, monitoring and evaluation and to minimize bureaucracy in undertaking key policy actions including development of quality standards, incentive frameworks, sector regulation and local and international marketing and promotion.

Jamaica Business Development Corporation (JBDC)

The Jamaica Business Development Corporation is tasked with the implementation of programmes to support the development and viability of the micro and small and medium enterprise (MSME) sector as well as the implementation of the government's MSME and Entrepreneurship policy. Since inception, the Corporation has been leading craft industry development providing design and product development, incubator support, business upgrading activity, micro-financing and financing support and promotional and market penetration support, primarily through the Things Jamaican chain of stores. The JBDC will lead in policy implementation, new product development, craft standards, upgrading of production infrastructure to support craft micro-enterprises, developing of branding, packaging and labelling programmes, research and development into utilization of new and existing sources of raw material supply. The JBDC will also lead in making recommendations for the development of programmes to provide grant and loan support to finance craft businesses. It is recommended that the JBDC work closely with Culture Agencies such as the Jamaica Cultural Development Commission in strengthening Jamaica's cottage industries within communities with particular focus on technical training.

Jamaica Intellectual Property Office (JIPO)

JIPO is the primary agency with responsibility for matters relating to intellectual property rights in Jamaica. It has the critical mandate to establish and administer a modern and effective intellectual property system which is to be a catalyst for international competitiveness, facilitating economic growth and national development. Intellectual Property will be one of the key issues in streamlining the craft sector

The Bureau of Standards Jamaica (BSJ)

The Bureau of Standards Jamaica (BSJ) is the national institution responsible for standardization and metrology, and serves as the regulator for locally manufactured, as well as, imported commodities for which there are compulsory standards. In fulfilling its mandate, the BSJ facilitates trade and business development, protects consumers and promotes fair trade. The BSJ will support policy implementation through the development of appropriate standards for labelling of craft products and minimum product standards to upgrade export potential and will support the implementation of a certification programme for authentic Jamaican craft.

The Jamaica Promotions Corporation

The Jamaica Promotions Corporation (JAMPRO) is Jamaica's investment and export promotion agency and, as such, is mandated to stimulate, facilitate, and promote the development of trade and industry, as well as export and investment activities in all sectors of the island's economy. Where required, JAMPRO will provide guidance on craft export facilitation.

The Consumer Affairs Commission (CAC)

The Consumer Affairs Commission (CAC) falls under the aegis of the Consumer Protection Act of 2005 and was established to protect the interest of the local consumer. This is achieved through its consumer education programme, its complaints resolution service, and its corporate services and affiliations. The CAC will be engaged with a view to providing guidance on misleading trade practices. The Trade Board Limited is a regulatory agency of the Government of Jamaica and operates under the legal authority of the Trade Act (1955). It is responsible for the management of Jamaica's import and export licensing regimes. The Trade Board is also Jamaica's certifying authority for goods exported under several preferential trade agreements. The Electronic Transactions Act further designates the Trade Board as the agency responsible for Jamaica's Public Key Infrastructure.

The Urban Development Corporation (UDC)

The Urban Development Corporation is active in transforming Jamaica's most viable urban centres and strategic rural towns, whilst preserving the natural environment and spurring economic development. The core business objective of the UDC is to make development happen through the planning and implementation of comprehensive projects and programmes in designated areas. The Corporation is currently working in five areas namely Kingston and Port Royal, Caymanas, St. Catherine, Ocho Rios, St. Ann, Falmouth, Trelawny and Montego Bay, St. James and has done significant research and development on the concept of artisan development. The UDC will therefore be a key implementation partner with responsibility for advisory support on infrastructure development to support key policy actions.

Jamaica Customs

The Jamaica Customs Department is an Executive Agency of the Government of Jamaica, tasked with revenue collection, protection of Jamaica's borders against illicit imports and the facilitation of trade. One component of its activities in trade involves the protection of Jamaica's industries, labour and intellectual property rights by enforcing Jamaica's laws intended to prevent illegal trade practices.

7.2 Organizing for Implementation

Feedback obtained from consultations indicates that stakeholders are strongly in favour of the establishment of a central coordination point to bring an appropriate level of governance, regulation and oversight to issues affecting the sector's development. This is mainly due to the perception that past individual initiatives from various government sponsored and private agencies have met with limited and temporary success and it is felt that a more multi-pronged and focused approach by various agencies engaged under one umbrella Craft Industry Council is now needed to position the sector for competitiveness. There are issues in developing authentic Jamaican craft that satisfies the demands of various cultural, corporate and commercial customers and consistent, motivated and highly knowledgeable institutional support is required to achieve same. The manner in which Craft Markets are being operated in resort areas is perceived to threaten the quality of the visitor experience; however, there is also dissatisfaction on the part of craft producers and vendors about the levels of access to opportunities for earnings linked to visitor traffic. The establishment of a Craft Industry Council that provides oversight to the sector will combine the strengths of all relevant stakeholders to provide the necessary institutional support.

In the short term, the Craft Industry Council should act quickly to develop and conclude inter-agency Memoranda of Understanding, outlining the roles and responsibilities of the key stakeholders named above in collaborating towards policy implementation. The Craft Industry Council will provide oversight on the implementation of agreed initiatives. The craft industry will also benefit from a renewed focus on innovative products and programmes driven by high level research and development initiatives supported by increased resources and close monitoring and evaluation.

7.3 Implementation of Action Plan

Table 9 shows the implementation action plan of the National Craft Policy and Strategy of Jamaica. The plan has been developed based on substantial discussion with stakeholders. An indication of the target time frame for achievement of outcomes is provided with the inclusion of the following abbreviations in parenthesis.

- IM- immediate
- ST-short term
- MT- medium term
- LT- long term

Table 9: Monitoring and Evaluation Framework for the Implementation Action Plan						
Item	Objectives	Key Activities	Implementing Partners		Target Outcome & Time Frame	Indicator
			Lead	Other Agencies		
1.0	Goal 1: To develop a streamlined and rationalized sector, positioned for growth, expansion, increased employment and contribution to national earnings through appropriate institutional support, incentives and sustainable financing					
1.1	To provide specialized institutional support for the development, governance, regulation and growth of the Jamaican craft sector nationally and internationally through the MICAFA-led inter-ministerial PPP Craft Industry Council	1.1.1. The execution of GOJ funded baseline and demand and supply studies of the craft industry by JBDC to capture most current information on stakeholders, products, materials along the value chain	MICAFA/JBDC	MCGES, JTB (MOT)	<ul style="list-style-type: none"> • MOUs on roles and responsibilities (ST) • Format of operational plans established and implemented (MT) • Stakeholder consultations completed (MT) 	<ul style="list-style-type: none"> • Model legislation for a permanent governance structure developed • Permanent institutional support established through MOU and/ or legislation • Human and financial resources committed to sustain operations
		1.1.2. Support institutional strengthening of JBDC, consistent with the JBDC's mandate and Strategic Plan through the development of inter-agency MOUs outlining roles and responsibilities in policy implementation				
		1.1.3. Establish an institutional framework which will govern the craft sector in Jamaica and undertake stakeholder consultations				
1.2	To enable better regulation of the sector and administration of incentives through licensing	Design and implement a system of licensing to identify all legitimate players in the craft, visual arts and souvenir sector including all producers, vendors and retailers	MICAFA	MOT, TPDCo	<ul style="list-style-type: none"> • Enhanced business environment to support increased upgrading, employment, revenues to stakeholders and new investments (LT) • Increased and permanent support for legitimate players within the sector (MT) • Improved monitoring and measurement of the economic and social impact of the sector 	<ul style="list-style-type: none"> • Licensing system established • Stakeholders registered (number and time frame)

					(MT)	
1.3	To design, implement and administer incentives for the development of the craft value chain locally, consistent with, but not limited to the provisions of the Fiscal Incentives (Miscellaneous Provisions) Act , 2013 and stimulate new investment, employment and earnings in the craft and tourism industries	Design and implement a fair and transparent system of incentives for craft development, including small grants for export development and exhibitions, Authentic Jamaican competitions, small equipment and machinery duty concessions, concessions on inputs, system of quotas or incentives for sale of Authentic Jamaican craft for retailers; refurbishing of unused spaces to support craft production and sale, strategies and incentives to promote and support use of craft in Jamaican interiors and public spaces	MICAF	MCGES, MOT, Ministry of Finance	<ul style="list-style-type: none"> • Revitalization of the sector and the national interest in authentic Jamaican products (LT) • New incentives for all players in the sector, to increase the sustainability of livelihoods and businesses, local retention of value and increased investment in Jamaican products, artisans and craft related businesses. (MT) 	<ul style="list-style-type: none"> • Development and approval of incentive system through consultation with key agencies • Incentive system established and in operation • Number of applicants for incentives • Measurable impact of incentives • Improved capacity and/or competitiveness of producers
1.4	To facilitate ongoing capacity-building, training and development of authentic Jamaican craft industries	Develop a programme of capacity building for producer and vendor associations to establish sustainable management frameworks to support advocacy, self-governance and implementation of policy objectives	JBDC	HEART	<ul style="list-style-type: none"> • Increased human and institutional capacity to manage growth and development of the sector (ST) 	<ul style="list-style-type: none"> • Number of capacity building initiatives implemented
1.5	To provide guidance for the development of national programmes concerning the craft sector in line with the goals of sustainable development	<ul style="list-style-type: none"> • Ongoing input to national policy framework on matters related to craft, visual arts and souvenir industries • Development of structured programme interventions to develop the craft sector 	MICAF /JBDC	MOT, MCGES, National Cultural and Creative Industries Commission, Planning Institute of Jamaica	Craft policy vision a of enabling environment for a viable and sustainable industry achieved (LT)	<ul style="list-style-type: none"> • Number of structured strategic programmes developed and implemented • Transparent criteria for financial support and assistance established

1.6	To streamline financial support from government and other agencies towards social development and infrastructural improvement within the craft sector	Establish a system of measurement, monitoring and evaluation of the sector and support provided to key players, including transparent criteria for project selection				<ul style="list-style-type: none"> • Impact measurement of sector support • Strategic evaluation of sector support programmes: results and impact
1.7	To monitor the implementation of the National Craft Policy and Strategy, measure the resulting outcomes from implementation and provide periodic review and adjustments to the policy framework as required.	<ul style="list-style-type: none"> • Time frame for policy implementation and priorities agreed • Conduct periodic reviews of policy implementation 	MICAF/JBDC		Established governing body functioning as the main policy monitoring mechanism (IM)	<ul style="list-style-type: none"> • Periodic reviews of progress of policy implementation completed
2.0	Goal 2: To protect traditional cultural expressions based on culture and heritage through structured interventions, including but not limited to, support for branding and intellectual property protection					
2.1	To identify, preserve, protect and promote traditional cultural expressions in the context of culture and heritage	<ul style="list-style-type: none"> • Using the One Product One Village model, identify the retention of craft-based cultural expressions, Taino and other heritage expressions and typical flora and fauna in each parish across the country and their potential for intellectual property 	MICAF/JBDC/JIPO	MCGES, SDC, TPDCo, JTB, BSJ, JCA, Craft producers and traditional communities	<ul style="list-style-type: none"> • Preservation and promotion of traditional cultural expressions in the context of Jamaican heritage (MT) • To achieve protection by means of registration of IPRs of producers and vendors of authentic Jamaican craft (MT) 	<ul style="list-style-type: none"> • Number of expressions identified • number of programmes developed and funded, • number of products developed for promotion, • applications for geographic indications • Geographic Indications registered

2.2	To empower traditional communities to be aware of their traditional expressions related to craft and protect their IPRs and their traditional expressions related to craft	<p>protection</p> <ul style="list-style-type: none"> • Design and implement a programme to develop the craft traditions of each parish into market ready items • Encourage the registration of IPRs related to craft brands, GIs and designs • Identification of communities with prospects to operate thematic attractions and tours • Facilitate the development of tours as a component of the community tourism model and related product development in collaboration with the communities • Develop an appropriate licensing and certification system to protect the authenticity of these tours, maintain the standard of quality and enable promotion as part of the national tourism offerings. • Training of stakeholders for self-governance and management of tours and economic opportunities 			<ul style="list-style-type: none"> • Increased revenues and promotion for craft communities (MT) 	<ul style="list-style-type: none"> • Standards and certification criteria for tours developed
2.3	To preserve traditional skills, rescue waning skills, increase earnings and engage new audiences	<ul style="list-style-type: none"> • Facilitate transmission workshops where traditional craft techniques can be shared and passed on to younger generations • Development of craft replicas of traditional artefacts under the supervision of the IOJ 	MICAF/JBDC	MCGES, IOJ, TPDCo, HEART, Producer groups, EMC	<ul style="list-style-type: none"> • Preservation of traditional skills and techniques (LT) • New opportunities for sale of craft (ST) • Development of cultural attractions and community tourism based on craft traditions 	<ul style="list-style-type: none"> • Number of workshops conducted • Number of communities impacted and geographic spread • New craft merchandise collections based on traditional craft/ artefacts available for sale

					to increase earnings from tourism and their distribution island wide (MT)	
2.4	To promote viable economic activities with traditional craft in consultation with producer communities	<ul style="list-style-type: none"> • Hosting of product development workshops and specialized markets and the development of cultural traditions linked various types of craft (e.g. tin, wood, reclaimable materials, straw, clay) and various components of heritage (eg. Indian, African, Chinese, European) islandwide 	JBDC	MCGES, JIPO, SDC, MLGCD, Craft producers and traditional communities	<ul style="list-style-type: none"> • Increase the diversity of product offerings and their appeal to prospective customer segments (MT) 	<ul style="list-style-type: none"> • Number of events • Number of new product offerings • Number of visitors/patrons
2.5	To strengthen the cultural and community tourism offerings of Jamaica	<ul style="list-style-type: none"> • Audit of potential distinctive and exclusive market spaces for Authentic Jamaican craft in the form of <ul style="list-style-type: none"> i. artisan villages ii. existing attractions iii. new retail sites iv. kiosks within cultural sites and/or v. potential community attractions where high quality tours can be developed • Model agreement for public-private partnership • Project development and investment plans • Training of Communities • Programming of cultural offerings such as cuisine and entertainment 	MICAF	TPDCo, UDC, MCGES, JTB, JBDC, MOT, MLGCD	<ul style="list-style-type: none"> • New quality spaces for authentic Jamaican craft operationalised (ST) • New public-partnership models implemented (ST) • New investment (ST) • New cultural offerings (ST) 	<ul style="list-style-type: none"> • Number of new and quality market spaces for authentic Jamaican craft identified • New project plans developed • Programming for cultural offerings • Levels of new private investment attracted • Number of public-private partnerships developed

3.0	Goal 3: To create an appropriate enabling environment for the development and production of new authentic Jamaican craft, visual arts and souvenir products through the implementation of standards and support systems for growth in new product and market development					
3.1	To identify legitimate producers of Jamaican craft, visual art and souvenirs in order to provide the necessary support and assistance to improve products and market opportunities	3.1.1 Expand existing product and producer assessment into a national rating system for producers based on competency, ability to produce both quality and quantity in a sustainable manner, with regard to recommended criteria reflecting traceability and environmental/ecological awareness. The national rating system will establish a priority index for participation in government sponsored promotional activities such as trade fairs, exhibitions, export development initiatives	JBDC		<ul style="list-style-type: none"> • Rating criteria and system established (IM) • Implementation of rating system for capacity and quality (IM) • Mechanism for appeal of rating developed and enacted (IM) 	<ul style="list-style-type: none"> • Number of producer ratings completed • Number of appeals

		<p>3.1.2 Identification and registration of producers of authentic Jamaican craft, visual arts and souvenir products</p> <p>3.1.3 Development of an information database identifying details of business, inputs/raw materials, products, processes and markets (actual and potential)</p>	MICAF/JBDC	COJ, MCGES, TPDCo, JIPO	<ul style="list-style-type: none"> • Centralised information database on craft producers developed and accessible (ST) • Clearer identification of the producers in the sector and production capacity assessment (ST) • Needs analysis (ST) 	<ul style="list-style-type: none"> • Number of producers identified • Number of producers registered • Production capacity assessed • Needs analysis completed • Number of entries in the information database
3.2	To create a demand-led and responsive production-oriented environment which encourages the production of Jamaican-made craft, visual arts and souvenirs and increases the visibility and promotion of these products to visitors, corporate procurement and export markets in order to reduce the importation of craft products and increase the sales of Jamaican made items.	<p>3.2.1 Design of system of technical incubator support to enable appropriate production support to enable rapid commercialization of authentic Jamaican craft, visual arts and souvenir products</p> <p>3.2.2 Design of business incubation support to facilitate access to grants for new product development and innovation and loan financing for viable businesses</p> <p>3.2.3 Development of incubator application process</p>	JBDC		<ul style="list-style-type: none"> • Incubator access criteria established through needs assessment (MT) • Technical incubation system established (MT) • Business Incubation system established (ST) • Application process established (ST) • Access to financing negotiated and established (MT) 	<ul style="list-style-type: none"> • Number of producers incubated • Increased competitiveness of producers • Number of new product lines introduced • Impact of incubation on businesses • Number of businesses obtaining access to finance • Number of businesses achieving access to market
3.3	To support human capacity development and increased access to opportunities for employment and entrepreneurship; particularly among micro and small enterprises in the craft sector	<p>3.3.1 Expand JBDC's existing craft industry development programme islandwide, to include entrepreneurship and practical training ranging from design and production, to marketing.</p> <p>3.3.2 Develop a calendar of technical assistance and capacity building, training and short workshops to provide exposure to new product</p>	MICAF/JBDC	EMC, Jamaica Bureau of Standards, JIPO, TPDCo,	<ul style="list-style-type: none"> • Improved capacity building for sector expansion and growth (MT) • Improved capacity for export (MT) • Improved capacity for advocacy and governance among associations (ST) • Labelling standard for authentic Jamaican craft and souvenirs developed 	<ul style="list-style-type: none"> • Calendar of capacity building and training events established • Number of training events • Number of participants • Evaluation/ feedback from workshops • Number of capacity assessments • Number of new export ready craft, souvenir and

		<p>development, product finishing, business management, energy efficiency, tourism awareness, customer service and any other areas of need identified:</p> <ul style="list-style-type: none"> • Artisans • Vendors • Community Groups • Associations <p>3.3.3 Implement technical assistance and capacity building, training and short workshops</p> <p>3.3.4 Create a programme of upgrading of export potential through greater focus on training in relation to standards, supply capability, reliability, costing and pricing, branding, labelling and product innovation with the cross-cutting features of quality and consistency</p> <p>3.3.2 Encourage the formation of producer associations and cooperatives as non-profit organizations and undertake capacity building to strengthen the associations in order to support the competitiveness of members</p> <p>3.3.3 Develop a labelling standard for craft items which addresses the practice of misleading and deceptive labelling of country of origin among imports</p> <p>3.3.4 Create a minimum set of product standards for the</p>			<p>and promoted (ST)</p> <ul style="list-style-type: none"> • Minimum product standards for key products in demand developed and promoted (ST) • Capacity building workshops (ST) 	<p>visual art products</p> <ul style="list-style-type: none"> • Number of participating producers/ enterprises • Level of adoption of standards and/ or codes of practice • Workshop attendance and feedback • Number of enterprises exporting and export ready • Level of exports • Number of capacity building exercises and activities undertaken <ul style="list-style-type: none"> • Number of new non-profit incorporations • Number of new producer associations formed • Number of capacity building exercises and activities undertaken • Number of applications for Geographic Indications • Level of adoption of standards among producers • Adherence to standards • Workshop attendance
--	--	--	--	--	---	---

		guidance of producers and importers				
4.0	Goal 4: To enhance revenue streams and profits of legitimate craft producers and vendors through expanded customer access, increased customer satisfaction, quality, product variety, customer-centric market spaces and value for money					
4.1	To reorganize/ redevelop existing craft markets as Artisan Villages.	<ul style="list-style-type: none"> i. Craft Market redevelopment audits ii. Model agreement for public-private partnership iii. Project development and investment plans iv. Training of Communities v. Programming of cultural offerings such as cuisine and entertainment. 	TPDCo	MICAF, UDC, JCDC, JTB, JBDC	<ul style="list-style-type: none"> • Audits completed (ST) • Agreements developed and contracts signed (MT) • New redevelopment plans (MT) • Training (IM/ ongoing) • Cultural programming (IM/ ongoing) 	<ul style="list-style-type: none"> • Number of agreements signed • Number of upgrading projects completed

4.2	To expand the points of distribution of authentic Jamaican craft, to include greater sales, including through airport and cruise ship terminals, hotel gift shops, through online portals and the launch of a Things Jamaican franchising model	<ul style="list-style-type: none"> • Establishment of Artisan Villages to offer interactive shopping experience for locals and visitors • Develop a calendar of promotional events, fairs, festivals, markets and trade shows, locally and overseas and establish criteria for participation based on excellence rating. • Implement the organization of a regular calendar of pop-up shops and craft fairs, particularly in rural areas • Expand the current capacity of the JBDC, building on their experience in craft development, to have an export marketing strategy, including a craft e-store to reach foreign markets • Develop formal linkage programme to expand local purchases by retailers, including gift shops and vendors • Create electronic catalogues to enable promotion of authentic Jamaican craft, visual arts and souvenir products • web enabled platform 	JBDC	MICAF, MTM, MT, TPDCo	<ul style="list-style-type: none"> • Artisan Villages launched • Quarterly events established (IM) • Increased revenues for formal and informal craft producers through increased sales directly resulting from the linkage programme (MT) • Major E-Commerce site aligned with the national branding of authentic Jamaican products operational (MT) • Electronic catalogues produced, updated quarterly, promoted through the functioning (MT) web enabled platform • Enhanced revenues for producers (MT) 	<ul style="list-style-type: none"> • Number of new distribution points and events for authentic Jamaican craft • Number of buyers attending • Number of producers attending • Number of production orders obtained • Feedback/ evaluation on event participation • feedback and evaluation of linkage programme • number of producers represented on e-commerce site • number of orders from e-commerce site • volume of sales from e-commerce
-----	---	---	------	-----------------------	--	---

4.3	To obtain improved market segmentation of products based on research ; to expand and further develop the capacity for market research and market intelligence on purchases of craft, and identify how to link the demands of the market with the existing and future capacity of local producers	<ul style="list-style-type: none"> Expand the scope of visitor surveys and surveys of vendors and retailers, leverage the Tourism Linkages Council to obtain actionable intelligence of what visitors have purchased and want to purchase, as well as compile trends from incentive system for retailers and vendors Create an effective mechanism (newsletter/ website) for dissemination of this information to producers 	JBDC	MICAF, MOT, JTB, TPDCo	<ul style="list-style-type: none"> Compilation of product / buyer/ consumer and visitor surveys (IM) Expanded market information, market research and market intelligence (ST) Improved support for demand-led and market oriented production (ST/ MT) 	<ul style="list-style-type: none"> Data on craft industry purchases compiled and disseminated Trend information compiled and available Number of newsletters subscribers/ website hits
4.4	Create a formal linkages programme to encourage production in line with market demand for local products (both tourist and corporate markets)	<ul style="list-style-type: none"> Design of linkage programme based on rating of producers and feedback in relation to market demand 	MICAF/JBDC	MT, JHTA, JAMPRO	<ul style="list-style-type: none"> Better integration of local suppliers with the local market (ST) Expanded earnings from tourism via a structured linkages programme (ST) 	<ul style="list-style-type: none"> Number of participants in linkage programme Increase in supplier relationships developed
4.5	Undertake a programme to provide support to partnership models for the packaging and development of factory and studio tours of artisans	<ul style="list-style-type: none"> Prospective factory and studio tours identified Partnership agreement developed and implemented 	MT	TPDCo, JTB, MICAF	<ul style="list-style-type: none"> New tourism offerings of factory and studio tours (MT) New investment at all levels of the value chain (MT/LT) 	<ul style="list-style-type: none"> Partnership agreements signed New tours in operation Level of new investment and employment
5.0	Goal 5: To develop the craft value chain for authentic and innovative Jamaican craft, by increasing quality and opportunities for commercialization in an environmentally sustainable manner by the expansion of linkages with other economic sectors					
5.1	To support increased use of available local materials, including natural fibres and natural dyes and recyclable and reclaimable materials in products	Development of projects and programmes to support sustainable harvesting and labelling of natural products (including wood), research and development of natural fibres and dyes and use of recyclable and reclaimable	JBDC	TPDCo, Forestry Department, NEPA, EFJ, MICAF MTM, Universities,	<ul style="list-style-type: none"> Sustainable harvesting of natural materials (MT) Increased use of local and indigenous materials in craft (MT) Increased use of recyclable and 	<ul style="list-style-type: none"> New research and development projects and programmes developed Resources identified Impact evaluation: Increased understanding of the

		materials and packaging, in collaboration with partner agencies			reclaimable materials in Jamaican craft (MT) <ul style="list-style-type: none"> Improved product variety (MT) Expanded research and development to support innovation (MT) Capacity building among producers (ST?MT) 	potential and practical use of locally available materials and new products developed
5.2	To improve packaging, labelling, branding, effective and appealing product design and consistent quality and pricing by producers	Develop and implement a national programme to provide incubator support to the branding, packaging, labelling and certification of authentic Jamaican craft, including the promotion of fair trade and fair labour standards, along with the appropriate marketing campaign to underscore the value proposition of the offering.	MICAF/JBDC	Bureau of Standards, , JIPO	<ul style="list-style-type: none"> Importance of branding recognized by producers (MT) Branding campaigns developed and executed locally and in target export markets (MT) Certification programme developed for authentic Jamaican craft (IM) Support to packaging and labelling development (IM/ST) Increased quality and customer satisfaction (MT/LT) 	<ul style="list-style-type: none"> New brands developed Authentic Jamaican collective brand is visible in the local and export markets Evaluation and feedback New certified craft products Upgraded packaging and labelling of craft products Increased visibility and sales
5.3	To expand the merchandising, retailing and visibility of authentic Jamaican craft, visual arts and souvenir products	5.3.1 Develop regular public interventions in the form of competitions, events and exhibitions to identify and promote authentic Jamaican craft, according to specific criteria including designs, best use of local materials, innovation and price and other factors, to reward competitiveness and innovation among producers	MICAF/JBDC	JIPO, JCDC, SDC	<ul style="list-style-type: none"> Improved customer access (ST) Increased revenues for producers of authentic craft (MT) Inter- agency linkages and agreements (ST) 	<ul style="list-style-type: none"> Number of interventions implemented Number of new craft and souvenir products identified Number of producers participating Number of brands (trademark) and IP registrations
5.4	To expand the Tourism Linkages Council i.e. linkages between craft and	5.4.1 Create programmes to encourage energy awareness among producers, vendors	MICAF/JBDC	MOT, MSET	<ul style="list-style-type: none"> Reduction of waste and improvement in environmental 	<ul style="list-style-type: none"> Number of programmes developed Number of craft

	other economic sectors, in particular growth sectors, including energy and ICT	and retailers; reduction of waste and environmental sustainability, use of the internet and ICT technologies to enable production efficiencies, networking and marketing.			<p>sustainability (MT)</p> <ul style="list-style-type: none"> • Internet penetration and use of ICT technologies to enable production efficiencies, networking and marketing (MT) 	<p>producers and vendors participating</p> <ul style="list-style-type: none"> • Programme evaluation and results
5.5	Identify prospects for export promotion of Jamaican craft and create and action oriented export strategy and programme of support for export development	<ul style="list-style-type: none"> • Export market research • Strategy development • Implementation of export development programme 	MICAF/JBDC	JAMPRO, Jamaica Exporters Association (JEA), MOT, JCA	<ul style="list-style-type: none"> • Identification of export potential for authentic craft products (MT) • Structured export marketing programme and increased earnings from export (MT) 	<ul style="list-style-type: none"> • Number of participants in export development programme • Level of exports achieved

CONCLUSION

The articulation of a National Craft Policy and Strategy of Jamaica provides a strategic framework for the provision of support to the orderly development of the sector. Craft, like all the manifestations of Jamaica's cultural and creative expressions holds unlimited potential. This potential is not limited to economic benefits, but the opportunity to instil the values of crafts and craftsmanship as symbols of the identity of a people, their history, knowledge, context and traditions. The revival of craft in Jamaica holds significant promise for refreshing the ideals of national pride, industry, community development and social cohesion. What is required is a medium-term development perspective that recognizes craft as a cultural treasure, which also offers the prospect of economic contribution through the building of sustainable and viable industries, with all the associated benefits of increased employment and revenues, providing the proper enabling environment is established. This opportunity is being pursued by many countries including key trading partners with Jamaica. As such, the development of this policy is a timely contribution to the aspirations for a better Jamaica.

APPENDIX 1		
List of craft and artisanal occupations aligned with the ISCO-08, produced by the International Labour Organisation		
CLASSIFICATION NUMBER AND REFERENCE	DEFINITION	EXAMPLES
2452 SCULPTORS, PAINTERS AND RELATED ARTISTS	Sculptors, painters and related artists create and execute works of art by sculpting, painting, drawing, creating cartoons, engraving or using related techniques	<ul style="list-style-type: none"> • Artist, commercial • Cartoonist • Engraver-etcher, artistic • Painter, portrait • Restorer, picture • Sculptor
3471 DECORATORS AND COMMERCIAL DESIGNERS	Decorators and commercial designers apply artistic techniques to product design, interior decoration and sales promotion	<ul style="list-style-type: none"> • Decorator, display • Decorator, interior • Designer, fashion • Designer, industrial products • Tattooist
731 PRECISION WORKERS IN METAL AND RELATED MATERIALS	Precision workers in metal and related materials make and repair precision instruments, musical instruments, jewellery and other articles of precious metals.	<ul style="list-style-type: none"> • Precision-instrument makers and repairers (7311) • Musical-instrument makers and tuners (7312) • Jewellery and precious-metal workers (7313)
732 POTTERS, GLASS-MAKERS AND RELATED TRADES WORKERS	Potters, glass-makers and related trades workers make bricks, tiles, pottery, porcelain ware and glassware, engrave and etch designs on glass articles, and paint or decorate glass, ceramics and related articles and signs	<ul style="list-style-type: none"> • Abrasive wheel formers, potters and related workers (7321) • Glass-makers, cutters, grinders and finishers (7322) • Glass engravers and etchers (7323) • Glass, ceramics and related decorative painters (7324)
733 HANDICRAFT WORKERS IN WOOD, TEXTILE, LEATHER AND RELATED MATERIALS	Handicraft workers in wood, textile, leather and related materials apply traditional techniques to produce various articles for personal or household use, as well as for decorative purposes.	<ul style="list-style-type: none"> • Handicraft workers in wood and related materials (7331) • Handicraft workers in textile, leather and related materials (7332)
734 PRINTING AND RELATED TRADES WORKERS	Printing and related trades workers set and arrange printing type or copy by hand or by electronic key-boarding or other machines, make printing plates from typographically or electronically set-up type or copy, engrave lithographic stones, printing plates and rollers, make and print with silk-screens, print on paper and other materials, or bind and finish books.	<ul style="list-style-type: none"> • Compositors, typesetters and related workers (7341) • Stereotypers and electrotypers (7342) • Printing engravers and etchers (7343) • Photographic and related workers (7344) • Bookbinders and related workers (7345) • Silk-screen, block and textile printers (7346)
742 WOOD TREATERS, CABINET-MAKERS AND RELATED TRADES WORKERS	Wood treaters, cabinet-makers, and related trades workers season and carve wood and wooden items, make and repair wooden furniture, wooden fittings, patterns and models, by using tools and woodworking machines; set or set and operate woodworking machines, make wicker furniture and related articles, and decorate and repair wooden articles and wooden parts of goods.	<ul style="list-style-type: none"> • Wood treaters (7421) • Cabinet-makers and related workers (7422) • Woodworking-machine setters and setter-operators (7423) • Basketry weavers, brush makers and related workers (7424)

743 TEXTILE, GARMENT AND RELATED TRADES WORKERS	Textile, garment and related trades workers prepare natural textile fibres, threads and yarns, and make fabrics by weaving, knitting and other means, make and repair garments and other textile and fur articles, or they upholster furniture.	<ul style="list-style-type: none"> • Fibre preparers (7431) • Weavers, knitters and related workers (7432) • Tailors, dressmakers and hatters (7433) • Furriers and related workers (7434) • Textile, leather and related pattern-makers and cutters (7435) • Sewers, embroiderers and related workers (7436) • Upholsterers and related workers (7437)
744 FELT, LEATHER AND SHOEMAKING TRADES WORKERS	Pelt, leather and shoemaking trades workers prepare fur- and wool-bean pelts for further use, make leather from hides and skins, make and repair footwear and other articles made of natural or synthetic leather with the exception of garments, hats and gloves, or make various other articles from leather and similar materials.	<ul style="list-style-type: none"> • Pelt dressers, tanners and fellmongers (7441) • Shoe-makers and related workers (7442)
826 TEXTILE-, FUR- AND LEATHER- PRODUCTS MACHINE OPERATORS	Textile-, fur- and leather-products machine operators operate and monitor machines which prepare fibres and yarns, or hides and pelts, and manufacture or dry-clean textiles, or fur and leather articles.	<ul style="list-style-type: none"> • Fibre-preparing, spinning- and winding-machine operators (8261) • Weaving- and knitting-machine operators (8262) • Sewing-machine operators (8263) • Bleaching-, dyeing- and cleaning-machine operators (8264) • Fur- and leather-preparing-machine operators (8265) • Shoemaking- and related machine operators (8266) • Textile, fur and leather products machine operators not elsewhere classified (8269)
<p>Source: International Labour Organization Standard Classification of Occupations, http://www.ilo.org/public/english/bureau/stat/isco/index.htm</p>		

APPENDIX 2
LISTING OF PARTICIPANTS IN CONSULTATIONS
NATIONAL CRAFT POLICY AND STRATEGY OF JAMAICA

African Caribbean Institute of Jamaica/ Jamaica Memory Bank
Bureau of Standards Jamaica
Distant Enterprises Ltd
Dunn's River Craft Market Association
EMCVPA
Forestry Department
HEART/NTA
Institute of Jamaica
Jamaica Business Development Corporation (JBDC)
Jamaica Cultural Development Commission
Jamaica Customs
Jamaica Hotel and Tourism Association (JHTA)
Jamaica Intellectual Property Office
JAMPRO
Jasmine Thomas Girvan – Jewellery Designer
Holiday Craft Market
Margaret McGhie Ceramics
Ministry of Foreign Affairs and Foreign Trade
Ministry of Industry, Commerce, Agriculture and Fisheries
Ministry of Culture, Gender, Entertainment and Sport
National Environment and Planning Agency
National Gallery of Jamaica
OPM Creative Industries Commission
Port Authority of Jamaica
Portland Parish Council
Rural Agricultural Development Agency (RADA)
Rutland Point Craft Market
Sandals Resorts International
Sidcile Custom Craft
Sinclair's Ceramics
Social Development Commission
St. Ann Parish Council
St. James Parish Council
Suzette Wolfe Wilson – Craft Researcher
Tourism Product Development Company
Trade Board Ltd.
Tricia Evelyn Designs
Urban Development Corporation

APPENDIX 3

GLOBAL MODELS OF SUPPORT FOR CRAFT DEVELOPMENT

3.1 INSTITUTIONAL SUPPORT TO CRAFT DEVELOPMENT

Globally, the craft sector typically benefits from specialized institutional support for development programmes in the form of Arts Councils and Craft Councils. Some additional formats of institutional support to craft industries in various countries are briefly reviewed below.

India is recognized as a global leader in handicraft export development. Indian exports of handicrafts account for more than half of the country's entire productive capacity. The Indian Export Promotion Council for Handicrafts was established in 1986 as a non-profit organization that promotes the production and export of Indian handicrafts through the enactment of policies that ensure the support and promotion of local handicrafts production in India. Over time, the organization has been recognized globally as a best practice model for poverty alleviation. In the fiscal year 2012/3, India produced an estimated \$5600 million in handicrafts, with exports amounting to \$3304 million and growing by 22.15% over the preceding year. The promotion of the craft sector by the Export Council and the advocacy for a favourable policy and legislative environment to support the growth of the sector has been instrumental in attaining this level of success.

In South Africa, the National Arts Council (NAC) was established through the recommendations of a 1996 White Paper as a statutory body with the principal task of distributing funds to artists, cultural institutions, non-governmental organizations and community based organizations. It is an agency of the government Department of Arts and Culture (DAC). Implementing agencies, Councils and other Cultural and Creative Industries organizations were encouraged to apply to the NAC for programme grants. The NAC also offers individual bursaries to post graduate students. Undergraduates are offered bursaries through education and training institutions. The NAC's priority is to fund organizations or projects that are of national importance with national implications, or that are contributing to nation building. Preference is given to first-time applications, therefore implementing agencies cannot rely on NAC funding year after year. Furthermore the NAC is unlikely to fund an entire project, making this a very minor source of funding for the implementing agencies and councils. It does not provide funding for running costs of

organizations, seed funding, music instruments, infrastructure, capital costs and purchasing of equipment.

In Italy, craft production is among several industrial sectors where small firms are dominant. Powerful inter-firm associations, such as the National Confederation of Crafts and Small and Medium Enterprises (CNA) are involved in coordinating the sector for visibility, training and capacity building, marketing and export promotion as well as taxation and social security arrangements. These associations are driven by paid membership, providing collective advocacy, social protection and engagement.

Artesanias de Colombia Handicrafts Colombia SA (www.artesantiasdecolombia.com) is a special purpose entity of the Government of Colombia, managed and administered by the General Assembly of Shareholders, the Board and the CEO. Artesanias de Colombia contributes to the progress of the artisanal sector through technological improvements, research, product development and training of human resources as well as promoting and marketing Colombian crafts. The mission of the agency is to lead and contribute to the overall improvement of craft through the rescue and preservation of crafts and tradition, promoting competitiveness, research, product development, transfer of methodologies, marketing and commercialization; all in a context of decentralization and development of local and regional capacities, so as to ensure the sustainability of the craft and the welfare of the artisans with a view to the strengthening of the value chain of the craft.

The entity was created in 1998, through the general legislative principles and rules contained in Article 54 of Law 489 concerning industrial and commercial enterprises of the State. It has legal and administrative autonomy and its own capital. The General Shareholders Meeting is composed of shareholders registered in the Register of Shares and Taxes, or their representatives or agents. This is chaired by the Minister of Commerce, Industry and Tourism or his delegate and, in his absence, by any of the participants, a decision that will be agreed by majority vote. The Board of Directors of the Company consists of seven (7) members and is composed as follows:

- The Minister of Commerce, Industry and Tourism or his representative, who presides.
- Two (2) representatives of the President of the Republic, and their alternates.

- Four (4) members and their respective alternates, elected by the General Assembly.

These four (4) representatives elected by the General Assembly serve for a period of one (1) year, but may be re-elected indefinitely. The Manager of the Company is appointed by the President of the Republic and serves at the President's pleasure. The Manager is supported by four Deputy Manager positions related to Promotion and Trade Opportunities; Development and Strengthening of the Craft Sector; and the Administrative and Financial Assistance.

Among small states, Mauritius, Seychelles, Barbados and the Bahamas provide some instructive models of institutional support. The 2011 Cultural Industries Development Act enacted by the Parliament of Barbados, provides for the establishment of a Cultural Industries Development Authority (CIDA) as an agency of the Ministry of Culture, Sports and Youth. The Authority will administer a suite of policy incentives provided through the legislation to cultural practitioners, including visual artists and craft workers. These incentives are linked to the formal registration of these practitioners within the Barbadian Directory of Artistes (www.barbadosartists.bb), a government hosted registry of professionals, which is accessed through an application process to verify bona fide artist status.

The Draft White Paper (2013) titled Creative Mauritius- Vision 2025 proposed the construction of a Culture House, to accommodate multiple services and agencies. In addition, the building would house an auditorium, an art gallery, conference facilities with state of the art technology, training spaces for courses/ workshops, recording studios with post production facilities and other facilities for permanent exhibitions. The Mauritius Arts Council (MAC) would be restructured to create an advisory Council for communication with stakeholders as well as a department for promotion of Creative Industries.

The third revision of the Craft Policy of the Republic of Seychelles, first published by the Ministry of Industries and International Business (MIIB) in 1998, focused on the creation of a viable craft sector as a linkage to tourism and the wider economy. The 2002 policy revision recognized the critical role of a Craft Sector Working Group, chaired by the MIIB in the ongoing review of the policy and charting of a new course for artisans. Through the Seychelles Industrial Development Corporation (SIDEK), the government proposed to establish Resource Centres for product development research under the

guidance of a Product Development Board and to equip a National Design Centre as a focal point for the artisan community. Private artisan associations and cooperatives are seen as partners with MIIB and SIDEC in the process of craft development and the policy advocates for stronger motivation of artist and artisans in the drive to move forward and propel the industry towards self-reliance, higher standards, value-for-money, customer-orientation, export competitiveness and long-term sustainability. Under the policy all artists and artisans are required to register with MIIB as well as pay a prescribed licence fee to the Seychelles Licensing Authority (SLA). The policy also seeks to bring together all the stakeholders including the Ministry of Tourism and Seychelles Tourism Marketing Authority to contribute to the enhancement of the sector. It stipulates that with further planned tourism developments and upgrading of the industry, the status of the craft sector should be upgraded to match the standard of the tourism sector. A Craft Industry Council was proposed to spearhead the implementation of the Craft Policy and to ensure that the performance targets are met.

In 2011, the government of the Bahamas enacted the Straw Market Authority Act in order to establish a statutory authority to maintain and manage the operation and further development of the government- owned straw markets. The Authority consists of a Board supported by a Manager and other employees to oversee the day-to-day operation of the Market. Rents constitute the working budget of the Authority and it is responsible for the collection of rents and fees from all tenants of the Market and the use of that income to undertake the operation, upkeep and maintenance of the facility; including appropriate security. The Act provides for the review of fees every two years. The Authority was established based on an initial expenditure of US\$12 million in public funds to construct a new Market building, and a further commitment of US\$750,000 in seed money to fund its start-up operations. These funds are expected to reflect the total contributions by the government to the cost of operation of the Market going forward; with the income from its operations being applied to sustain both the Market and the Authority. The creation of the Authority is anticipated to reduce the bureaucracy typically associated with the use of public services to maintain the market, by empowering it to make repairs and undertake maintenance through contracted service providers. The Authority will help to better facilitate the sustainable management and maintenance of a new building considered to be a cultural landmark and dedicated to showcasing Bahamian heritage and craftsmanship.

In summary, specialized institutional support to craft development and therefore the framework for governance and regulation of the sector is seen to have various forms globally. Advisory Councils, export development agencies, inter-firm associations, special purpose government agencies, inter-agency Sector Working Groups and statutory authorities have all be used as mechanisms to provide institutional support in order to achieve specific results.

3.2 ENABLING ENVIRONMENT AND LEGISLATIVE SUPPORT

In addition to institutional support, sector- specific policy and legislation are significant enablers of the craft sector's development. India's policy makers have focused on support to market driven designs; establishment of the required infrastructure for local clusters in the State level to thrive; revival of dying crafts through innovative methods; enhanced technical development and technology; business upgrading through the establishment of common facility centres; and improved flows of credit and raw materials to aspiring craftspeople, as key areas. Government has also facilitated major emporiums that provide a central hub for the display and sale of finest quality crafts in all large cities in the country. Promotion of Indian crafts through e-shops and websites is also encouraged. A system of export tax credits and duty drawbacks linked to registration with the Indian Export Promotion Council for Handicraft has successfully incentivized export production.

Through its National Policy on Culture and Heritage (2009), the Republic of Kenya focuses on craft as a component of the culture, heritage and social environment. The policy notes that the craft sector provides an entry point into the economy for industries and elaborates on the role of design. The impact of importation, external imposition and invasion of alien cultures and designs are major concerns. The policy statements encourage the protection, promotion and development of a Kenyan identity in the various design disciplines and the research into, and promotion of, traditional designs, support to innovation and new design as well as the creation of design institutions. Through the policy, the government encourages private sector partnerships via tax-facilities in compensation for private sponsorship of Kenyan artists. It also facilitates exhibitions and art fairs, locally, regionally and internationally, and promotes exchanges between artists from different cultural horizons.

The Barbados Cultural Industries Development Act, 2011 is applied to visual arts, the training and professional development of artists and students of the arts and product design, marketing and distribution of cultural goods and

services. It aims to provide for the establishment of a regulatory framework to facilitate and encourage the sustainable growth and development of cultural industries, bring structure to the industry and boost the incomes of those operating within it through the funding for cultural projects and duty free concessions and income tax benefits in respect of cultural projects. A Cultural Industries Development Fund was also established through the Act to incentivize cultural production. Tax exemptions are also available for film and motion picture projects. Where a cultural project has been reviewed and assessed and has met the eligibility standards and requirements, the Minister issues the practitioner with a licence related to the approved project.

Approved cultural projects in Barbados are exempt from the payment of import duty, stamp duty, consumption tax and value added tax on imports of equipment, building materials purchased locally and other capital assets. Other incentives in respect of an approved cultural project include the payment of tax at the rate of 15 per cent on the profits of the project, exemption from withholding tax on dividends and interest earned on investment in an approved cultural project, exemption from the payment of stamp duty, a deduction of tax of an amount equal to 20 per cent of the actual expenditure incurred in respect of the use of technology, market research and any other activity that is directly related to the development of the approved cultural project. Further income tax concessions are provided to loans for construction, furnishing or refurbishment above stated limits, expenditure on artistic works and expenditures for marketing, product development and research.

In Seychelles, only registered artisans are eligible to benefit from the various concessions and incentives on import of crafts-related items. These include various concessionary trade tax rates, such as 10% on the import of on capital equipment, 10% on packaging materials, 10% on semi-finished goods, 5% on raw materials and 5% on spare parts. The policy recommends periodic visits by the MIIB in collaboration with Seychelles Industrial Development Corporation (SIDECE) and the Association of Seychellois Craftsmen (ASC) to registered artisans' premises to ensure that they are fully engaged in craft activities. Importers of finished crafts do not benefit from any of the concessions granted, whereas vendors engaged in retailing crafts products are classified as retailers and require a retailing licence to operate.

Creative Mauritius: Vision 2025, a Draft White Paper published by the Ministry of Art and Culture (MAC) proposes multi-pronged strategies, to

enable the production of arts and crafts, within the wider sphere of creative industries encouragement. These include:

- tax exemptions for art purchases and sponsorship of locally produced art forms by individuals as well as by private institution
- taxation regimes for creative individuals
- development of artists' villages/ clusters in various parts of the island
- renovation of unutilized buildings (industrial or institutional) to make these available to artists
- creation of cultural attractions in conjunction with the Ministry of Tourism and Leisure
- capacity building programmes for artists, creative entrepreneurs and other stakeholders
- establishment of a National Arts University
- development of an inventory of Mauritian cultural heritage and encouragement of awareness programmes of heritage amongst the population, with special focus in the school curriculum.
- development of heritage trails and cultural tours by the MAC in collaboration with the Ministry of Tourism and Leisure
- short (few days/ weeks) and medium (few months) "workshop" type courses with a minimal recognition of prior learning prior proficiency as entry requirement
- removal of import duties for art-materials

MAC will negotiate with local bodies and other ministries to provide studio spaces / residencies with minimal rent in centrally located places (both in municipalities and district councils)

- organization of regular forums for discussion and exchanges between artists and other stakeholders
 - disbursement of a 1% tax on all commercial private and public buildings projected to cost above ten million rupees (either for new or renovation projects) for the purchase/ commissioning of art works by local artists
-

- imposition of tax barriers as a disincentive to import and dump cheaply produced art from other parts of the world into the local market.
- consideration provided to making the purchase of art from the artist tax-deductible for the art-buyer/art collector where this art has traceable provenance
- establishment of sculpture gardens in various parts of the island as cultural focal points and encouragement of permanent or ephemeral forms of urban art and street art in collaboration with the local authorities
- encouragement of design as a major feature of Mauritian industrial production
- development of a system of direct subsidy to cultural bodies and artists through the lens of 'cultural investment'; this means that there will be a system to monitor the output of such cultural investments against mutually agreeable and pre-established measurable outcomes, thereby ensuring greater accountability of public monies.

The MAC's role as direct sponsor or patron will have decreased and that of arts' administrator and facilitator will be its main role.

In Europe, support is widely provided through legislation to mandate the use of visual art commissions in public buildings. This is seen as a component of support to the implementation of cultural policy. In the Netherlands, a subsidy scheme exists which supports purchases of visual art in public buildings where these costs exceed 1 million EUR. The budget for arts is calibrated on a sliding scale in relation to the overall building costs as follows: between 1 and 7 million EUR 2% of total building costs; between 7 and 10 million 1% of the total costs plus 70000 EUR; where costs exceed 10 million, the arts budget amounts to 0.5% of the total costs, plus 120000 EUR. When the total building costs are less than 1 million EUR, there is no budget for art works. The initiative for this ministerial regulation was taken in 1951. In France, the "1% for Arts" Commission, also established in 1951, is a special body created for visual artists, which administers the public contracts code that requires 1% of the total amount spent on the construction, renovation or extension of a public building to be reserved for a contemporary artwork specially conceived for the building in question. This obligation now applies to both territorial and state governments. This system allowed the creation of more than 12300 artworks over 60 years (1951-2011). In Italy, Law 717/1949 on "2% for the arts" establishes that 2% of the investment costs of any public building (with the exception of schools) should be allocated to the commissioning of a work of

art by a living artist. Another legislative provision (Decree number 91/2013), enables a list of unused real estate properties belonging to the state administration to be hired at low rental prices as working spaces to cooperatives or associations of artists aged between 18 and 35.

In Canada, certain allowable income tax deductions are in effect for employed or self-employed visual artists, including “work space in home expenses” and professional membership dues that support the earning of employment income from "qualifying artistic activity". This includes: creating (but not reproducing) paintings, prints, etchings, drawings, sculptures or similar works of art; or an artistic activity in respect of which the taxpayer is a member of a certified professional artists' association. Artists also receive an income tax credit, calculated on the basis of fair market value, for a gift to institutions and public authorities designated under the Cultural Property Export and Import Act (1985). This Act provides special tax incentives to encourage all Canadians to donate or sell important objects to public institutions in Canada. An independent, administrative tribunal certifies cultural property for income tax purposes by making determinations with respect to the "outstanding significance and national importance" and the fair market value of objects or collections donated or sold to museums, archives and libraries.

In summary, across the global landscape, countries have developed systems of incentives to artistic visual arts and crafts activity, in order to stimulate original creative production, preserve culture and heritage, sustain viable business and infrastructural development and develop linkages with tourism and other productive sectors. These incentives include tax concessions and credits, as well as specific support to clearly defined activities. They are always provided in the context of specialized institutional support to manage and monitor the implementation and outcomes.

3.3 PROTECTING IDENTITY

Advancing globalization and liberalization of market spaces have created increasing challenges for the protection of cultural identity. New technologies, including digitization enable rapid copying and prototyping of ideas, with consequent challenges and opportunities for the development and preservation of creativity. Promotion and protection of cultural identity and intangible heritage have become key concerns, particularly for producers of traditional craft in developing countries. The situation is compounded by the fact that

many traditional crafts and craft production processes require adaptation in terms of designs or production processes in order to meet the demands of particular markets.

Artesanias de Colombia has attempted to tackle the complex issues by establishing an educational project to target the engagement of the artisanal sector in understanding the legal tools of intellectual property; implementation of the use of collective marks, certification and designations of origin; and strengthening the innovation and marketing of handicrafts in the domestic and international markets. Project components include awareness and management among producer communities, training and education, a technical-legal study to determine appropriate choices of legal protection for particular communities (Designation of Origin, collective or certification mark) and pursuit of legal protection followed by trade promotion and marketing. Monitoring and evaluation of the results for learning is also a critical component of the objective.

In Seychelles, the need to counter extreme competition from imported craft, led the Small Enterprise Promotion Agency to implement the Made in Seychelles stamp programme targeting local artisans in 2006. Registered local artisans were allowed to purchase a specially designed postage stamp which could be placed on locally produced items. The postage stamp nature of the Made in Seychelles tag made it a single use label, easily affixed to each unit produced, which could be removed, if desired by the final consumer purchaser. Sale of the aesthetically attractive stamps in a controlled manner to registered producers on a cost-recovery basis minimized the likelihood of the stamps being placed on mass-produced, imported products.

3.4 SPECIAL ARTIST'S FUNDS

In many countries, public funds are important to executing the national cultural policy. Where deemed necessary, best practices support their distribution in alignment with published Codes of Conduct for allocation of the funds, which are formulated to ensure a transparent and efficient processing of requests.

In South Africa, the government Department for Arts and Culture (DAC) established a Cultural and Creative Industries Fund (CIF) as one component of a White Paper to provide support to arts, culture and heritage (ACH) and creative industries development. The purpose of the CIF is to raise additional funds for the equitable delivery of development programmes for the sectors

and to disburse all funding received. The formation of the CIF was intended to streamline funding of the Cultural and Creative Industries and ACH matters by eliminating duplicate funding, so-called “double dipping” by beneficiaries and ensuring that agreed criteria for funding are adhered to and applied fairly, equitably and independently. No single Cultural and Creative Industries organization can receive more than 15% of available funds in one year. According to the legislation, the sources of funding for the CIF may include:

- the annual budget allocation of the DAC, any additional budget provided by National Government
- social responsibility budgets of private sector partners
- contributions from local, provincial, national, continental and international Cultural and Creative Industries organizations
- funds from donor agencies
- an agreed on percentage of funding or receipts generated from the hosting of international ACH events
- an agreed minimum annual contribution from businesses that constitute the Cultural and Creative Industries
- contributions from international private sector companies that invest in, and do business in the country
- any other person and/or organization willing to contribute to the CIF
- specific fund-raising activities and projects implemented by the CIF
- contributions from the allocation for Cultural and Creative Industries, provided by statute from the Lotteries and the Job Fund.

The Barbados Cultural Industries Development Fund is configured for the purposes of financing cultural projects and programmes that are designed to;

- develop the cultural industries sector and train cultural practitioners and administrations
- provide cultural practitioners with non-repayable grants to enable them to participate in local and overseas workshops and seminars, and allow for training, marketing, export and product development
- provide repayable grants to support cultural projects on the condition that the grants be repaid out of the future business revenues

- provide loans which allow for easy and flexible repayment together with interest
- provide equity financing to allow investors to inject funds into cultural businesses and in return to take an equity share in the capital of such businesses, and
- to defray the costs incurred in the administration of the Cultural Industries Development Act.

The Fund is resourced through money transferred to the Fund from the existing Arts and Sports

Promotion Fund; money voted by Parliament for the Fund; private sector donations; funds arising from gifts, grants or donations; and any other money received from such other sources as the Minister may determine. Administration of the Fund is the responsibility of a Committee consisting of a maximum of 7 persons appointed by the Minister by instrument in writing, including the Accountant General (Chairperson), the Chief Executive Officer of the National Cultural Foundation or nominee; the Director of the Barbados Museum and Historical Society or nominee; the Director of Cultural Policy and Research within the Prime Minister's Office or her nominee; a representative of the National Art Gallery; the Permanent Secretary, Ministry of Finance; the Comptroller of Customs; and the Registrar of Corporate Affairs.

In the Netherlands, the Cultural Participation Fund supports innovative initiatives that create cultural participation among all Dutch citizens. For the period 2013-2016, three programmes were developed with funding allocated to quality cultural education (14 million EUR), amateur arts innovation (3.5 million EUR); and talent and event development (3 million EUR). The Mondriaan Fund aims to stimulate the development and visibility of the visual arts and cultural heritage in the Netherlands. It provides financial support in areas where a profitable market does not yet exist. The fund aims to encourage innovation and excellence in these fields by supporting outstanding artists, cultural heritage and arts organizations and projects. It also organizes development programmes for promotion and innovation in the visual arts, such as the Prix de Rome and the Private Art Buyers Scheme which enables the purchase of art on credit at over 100 galleries spread across the Netherlands. The artwork can then be paid for in monthly instalments. The Creative Industries Fund NL started operating in 2013 and awards project-based grants in order to foster substantive quality in urban, landscape, product

and graphic design, architecture, fashion and E-culture; foster innovation and cross-sector approaches; and to professionalize entrepreneurship. An important concern is the improvement of the links between designers / makers and clients / manufacturers. In 2013 the Fund had a total budget of approximately 15 million EUR.

The French government also provides support for visual artists, graphic designers, designers and craft workers, enabling them to complete a specific project, to benefit from research stays and to participate in artists' residences; through grants from the Ministry of Culture and Communication budget, from territorial authorities, or by taxes that are redistributed via public bodies. The National Fund for Contemporary Art, established in 1976, provides funding for the acquisition, distribution and conservation of contemporary works in the fields of visual arts, photography, video and design. Acquisition policies are guided by three key objectives: to discover new young artists, to purchase outstanding works of artists who have attained maturity in their work, and to represent international art movements. This collection has accumulated more than 90 000 pieces of visual arts, photography, decorative arts or design. Italian visual artists receive less tangible monetary support; however banking foundations are increasingly supporting youth creativity in the arts sector, through the call for proposals mechanism. National Funds also exist to incentivize the acquisition of contemporary artworks by national museums and galleries of modern and contemporary art.

3.5 VISUAL ARTS AND CRAFTS EDUCATION AND TRAINING

As countries seek to development cultural and creative industries, education to support visual arts and crafts has been the subject of ongoing discussion and reform, including the introduction of compulsory programming as a component of primary and secondary curriculum in countries such as Italy and France. In the Netherlands, the three sector institutes concerning the creative industries (the Netherlands Architecture Institute, Premisela: the Netherlands Institute for Design and Fashion, and the Virtual Platform, the e-culture knowledge institute) have now merged to form the New Institute. The activities of the New Institute are grounded in the principles of design and innovation and it organizes dynamic programming, including exhibitions, lectures and fellowships, and carries out research and development projects around three thematic multi-annual programmes: Landscape and Interiors, Objects and Materials, and an additional changing annual theme. The New Institute is described as part of the Basic National Infrastructure for the period

2013-2016, which includes six exhibition spaces and three support organizations for the visual arts.

Confederation of Professional Education for Crafts and Small Enterprises ECIPA (www.ecipa.it) is affiliated with the business association National Confederation of Crafts and Small and Medium Enterprises (NCA). It is a national network, in electronic connection with territorial structures, which circulate information, knowledge and experiences from the entire system. ECIPA is further inserted into a related European network and offers vocational training and training in cultural entrepreneurship, in addition to the following business development services.

- studies and research on the profiles and skills training needs inside of small businesses and SMEs
- training for entrepreneurs and managers of small businesses and SMEs
- training for apprentices of craft enterprises and SMEs
- targeted training and technical upgrading of professional artisan entrepreneurs and their employees
- training for access to the professions regulated by national laws
- orientation, training, support and mentoring designed to create new businesses
- orientation and training for the development of equal opportunities
- orientation and training geared to the inclusion in the labour market of persons perceived as weak and disadvantaged.

India has many training institutions dedicated to crafts and design, including the Indian Institute of Crafts and Design (IICD Jaipur), an academic institution offering undergraduate and postgraduate programmes in areas of Craft Design. IICD is an autonomous Institute of Excellence, set up by the Government of Rajasthan, to act as a catalyst for the crafts sector. The central idea of the Institute is to evolve a sustained program of growth and development of both craftsperson and craft sector in an integrated manner. It seeks to generate requisite knowledge, upgrade relevant skills and foster the right attitudes in order to develop high quality, motivated human resource and change agents, in a vibrant climate of experimentation and innovation. This climate synergizes traditional knowledge and skills with contemporary needs to evolve methodologies that are relevant to modern India. Recognizing that

handicraft is part of a very complex global socio-cultural and economic scenario, students become involved in activities focused on design research and knowledge creation, customization of their training curriculum, exchanges, networking and support systems and exposure to market linkages and crafts promotion. Opportunities are created for the crafts persons to interact directly with customers and market outlets. IICD also organizes various platforms such as seminars, design clinics, buyer seller meets, etc. in order to create wider awareness about the role of design for crafts and for creation of new networks besides strengthening the existing ones. Efforts are aimed to establish design credibility and increase the persuasive power of Indian handicrafts as a brand in the international market.

Haiti has long been recognized among Caribbean nations as a country of artisans, where creativity abounds and this is complemented by resourcefulness, innovation and the community based organization of social enterprises in response to the challenges of poverty and underdevelopment. Craft factories are generally labour intensive and use a very limited range of materials and tools, combined with significant craftsmanship skills to achieve maximum effect in the products; given the scarcity of machines, equipment and electricity. Haitian artisanal products, including metal sculptures, beadwork, weaving, woodwork and painting are recognized in the US and European markets as high quality crafts, art and furniture, which deeply reflect local culture and traditions and yet are prized objects in high demand internationally. The culture, history and talent of Haiti attracted celebrated New York designer Donna Karan to develop and Urban Zen Foundation, an organization dedicated to supporting the development of linkages between artisans and the market. In 2015, through a partnership with Parsons School of Design and a Haitian designer and businesswoman, the Foundation opened the Design, Organization, and Training (DOT) Center. Occupying 5,000 square feet in an existing 20,000-square-foot T-shirt factory in Port-au-Prince, the DOT Center is an incubator for Haiti's artisan community, fostering innovation, providing resources, state-of-the-art equipment and materials, while enabling artisans to scale up production and preserving their unique cultural practices. Tertiary level students of Parsons are involved in exchange programmes which support the cross fertilization of market-led design skills through the design and manufacturing of market-ready products and the teaching of workshops for the artisans in production techniques such as laser cutting, fabric dyeing, wood bending, and block printing.

3.6 PUBLIC MARKETING AND PROMOTION

Cuba is recognized regionally and globally as a producer of fine art and utilitarian craft, which is reflective of both the African and Spanish influences on its culture and heritage. These include wood carved figurines, masks, fine ceramics and handmade cigars. Use of local materials such as seeds, natural fibres, marine resources and clay are highly valued by artisans. Cuba is internationally recognized in the visual arts community for the hosting of the Havana Biennale. In 2014, it hosted the sixth edition of the Cuban Arts and Crafts Fair, which comprised a sale of artisan works, alongside fashion shows, auctions, professional shows and entertainment activities. Also in this year, it staged the 15th International Crafts Fair, an annual event within Havana's trade fair Pabexpo, targeting artisans from Latin America, from December 8th to 18th. Through the establishment of a vibrant calendar of international level, marketing and promotion events, which are staged through the partnership of the publicly funded Cuban Fund of Cultural Assets and the Cuban Association of Artisans and Artists, hard currency earnings for artisans and by extension, the country are obtained; while establishing consistent visibility and authority of the country's cultural products and enhancing cultural tourism. Both the Fund and the Association are organized on a provincial level, consequently, regional exhibitions are also held in the run up to the national event.

In the revised version of the Republic of South Africa White Paper on Arts, Culture and Heritage (2003), policymakers aim to re-channel the traditional resistance to colonialism and apartheid into the national priorities of nation building, by promoting and sustain a culture of democracy, equality, development and human rights. In the craft sector, there focus on the potential for income generation, incubation and test marketing of manufacturing ideas that could later be produced on a larger scale and linkages to the tourist industry and the formal manufacturing and retail sectors. Six categories of craft are identified: traditional art, designer goods, craft art, functional wares, souvenirs and musical instruments. Flea-markets are considered to be an entry point for crafters wishing to retail their goods, as such the development of guidelines and advice for municipalities on how to manage the informal craft sector in urban centres to the benefit of the economy was viewed as important. Other key initiatives include:

- the facilitation of strong linkages between the craft and agriculture sector in rural communities
- financial assistance in the form of venture, working and expansion capital
- copyright protection strategies

- infrastructure (including signage) for businesses and marketing in a way to leverage the benefits from tourism
- development of information publications for practitioners and a directory of the sector and relevant publications informing craft producers, development practitioners and local authorities on the demand for craft products and the supply of materials and technologies useful to craft producers as well as of business development and support opportunities for crafters
- soliciting marketing support from tourism associations and other sector bodies and provision of updated information to tour operators and tourism associations about craft sites in urban centres.

Marketing and promotion to support the development of public audience for craft is a key component of Creative Mauritius: Vision 2025, a Draft White Paper published by the Ministry of Art and Culture (MAC). Support strategies include:

- the development of cultural festivals to provide marketing and promotion opportunities
 - an Artist of the Month recognition to publicize the work of a particular artist
 - development of artists' villages/ clusters in various parts of the island
 - creation of cultural attractions in conjunction with the Ministry of Tourism and Leisure
 - development of heritage trails and cultural tours by the MAC in collaboration with the Ministry of Tourism and Leisure
 - encouragement of artists participation in regional/ continental exhibitions
 - removal of import duties for art-materials
 - promotion and marketing at international level of artistic works
 - development of a travelling arts' gallery which will display Mauritian art works in governmental, para-public institutions as well as educational institutions
 - national competitions for visual arts with substantial cash prizes including international tours.
-

Craft cluster and consortia development

Clustering has often been hailed as a solution to impacting regional development of micro and small industries in the craft sector, by improving scalability and sustainability, assisting with export market penetration and improving social cohesion through cooperation.

In Italy (known as “Third Italy”), the development of economic success through enabling clusters of small firms in specific geographic regions has been linked to increased investment, sustained innovation and invention, growth in employment, and regional GDP; hence an improved quality of life and prosperity for citizens. Clusters, known as consortia are unified by a common purpose of strategic collaboration in access to financial support, marketing, bulk buying and warehousing, export development and/or collective service centres providing information, taxation advice, training and/or technical productive services. The consortium is a multi-party contract giving rise to a common organization which regulates or coordinates and performs one or more phases of the economic activity of the member firms. National and regional governments subsidize up to 50% of the running costs of consortia, which are non-profit, with a structure fixed by law and are required to reinvest net revenues in the organizations. Consortia must be registered, accountable to members, have periodic meetings and general assemblies and elect a Board from among their members.

Other critical success factors have been identified as the participation in consortia of strong lead firms, existence of independent design capability and the development of strong inter-firm associations as corporate administrative bodies to carry out the business of the consortia. The development of consortia was also enabled by innovations in governmental land use policies to promote small firm development following the passage of national legislation granting the power to authorities to expropriate large areas of land for industrial parks. In addition, covenanted building programmes were established to provide arrangements for artisans to make concessional leases and purchase of land and portions of finished buildings.

In India, aggressive promotion of the craft sector by the Export Promotion Council for Handicrafts has resulted in large scale fairs and exhibitions supported by the Council and targeting buyers throughout India and overseas, including the India Expo Centre and Mart and the Indian Handicrafts and Gifts Fair. This sector promotion has sustained more than 100 handicraft clusters in 27 States across India, producing a wide range of export ready

products including jewellery, children's toys, textile embroidery and handloom, horn and bone, painting, leather products, pottery and clay products, wood carving and inlay, woodturning, rugs and carpets, among others. The handicraft sector has led to the employment of 7.4 million people, most of who are vulnerable to poverty and reside in rural India. The infrastructural development of clusters has allowed for them to thrive through export incentives, such that in 2012/3 India exported significant proportions of handicraft production to foreign markets, including the United States (26.29%), United Kingdom (9.57%), the United Arab Emirates (8.93%), and Germany (7.82%), with another 26% going to several other countries. This focus on exports to developed nations has allowed the industry to thrive.

In Thailand and Japan, successful clustering has been accomplished around the One Village One Product (OVOP) Model, which has also been adopted in communities in Asia, Africa and Latin America, as a state sponsored policy to address poverty alleviation. The OVOP movement was initiated in Japan, in the late 1970s, with the objective of stimulating the rural economy. In its original form, the concept of OVOP was to encourage villages to each to select a product distinctive to the region and to develop it according to nationally and globally accepted standards. OVOP development is seen as a way of enhancing local communities' entrepreneurial skills by utilizing local resources and knowledge; creating value adding activities through branding of local products; and building human resources in the local economy. Production takes place through self-organized community-based enterprises (CBEs), nurtured at the level of villages or districts. In Thailand, approximately 68% of OVOP producers are CBEs, organized by more than 7000 sub-districts and employing approximately 1.5 million people in rural communities. OVOP initiatives are typically supported in the development of community-owned brands, enhanced product value creation and post-production exhibitions events. Export promotion and ecommerce initiatives have also been done. In Thailand, certification schemes engage individual entrepreneurs or CBEs, who are registered as OVOP manufacturers, in product competitions. Registered products are graded and certified from 1-star (the lowest) to 5- star (the highest) by an independent committee. The assessment criteria emphasize export potential through strong brand capacity; stability and production sustainability, quality, consumer satisfaction and the background of the product, particularly the use of locally available resources, knowledge and culture. Higher ranked products are facilitated in branding by labelling with the OVOP logo, which enhances consumer consciousness and recognition. In general, higher stars producers tend to be able to access better financial support, bank loans, marketing support, training, and provision of tools and machinery. Three star producers may be eligible for exhibition grants to participate in local exhibitions, while export promotion benefit is reserved for 5-star producers. The OVOP model has also

been used in Thailand to support the development of focal points for community based tourism.

Bibliography

- Best M.H. (1990), *The New Competition: Institutions of Industrial Restructuring*, Harvard University Press, Cambridge, Massachusetts, p.214
- Commonwealth Secretariat (2002), *Master Plan for Sustainable Tourism Development: JAMAICA*
- Culture, Creative Industries and Values Task Force (2009), *Vision 2030 Jamaica: National Development Plan: Culture, Creative Industries and Values: Sector Plan Final Draft*
- Cultural Survival (n.d.), *The Dynamics of Change in Tourist Arts*, retrieved from <http://www.culturalsurvival.org/publications/cultural-survival-quarterly/australia/dynamics-change-tourist-arts>
- Draft Report of the Thirty-Sixth Meeting of the Council for Trade and Economic Development (COTED), Georgetown, Guyana, 29 April -3 May 2013
- ENID (2013), *India Handicrafts: Best Practice Lessons for Policy and Programs in Egypt: Analysis and Experiences Gained*, Egypt Network for Integrated Development, Case Study 014, retrieved from http://enid.org.eg/uploads/PDF/CS14_india_handicrafts.pdf
- Ferrari C. (2010), *The Italian “Network Contract”: A New Tool for the Growth of Enterprises within the Framework of the “Small Business Act”?* Columbia Journal of European Law Online, J. Eur. L. F. 77 (2010), retrieved from <http://www.cjel.net/wp-content/uploads/2010/05/Ferrari-online.pdf>
- Institute of Jamaica (2015), *Safeguarding Traditional Craft in Jamaica*, Jamaica Journal, Vol, 35, no.3
- ITC/WIPO (2003), *Marketing Crafts and Visual Arts: The Role of Intellectual Property: A practical guide*, ITC Geneva
- McHardy P. (2008), *Developing and Promoting Craft as a Tourism Product Offering*, Tourism Product Development Company (TPDCo)

- Ministry of Arts and Culture (2013), Draft White Paper: Creative Mauritius: Vision 2025, http://culture.govmu.org/English//DOCUMENTS/CREATIVE_MAUROITIUS_VISION_2025_WEB_VERSION.PDF
- Ministry of Tourism (2011), Assessment of the Economic Impact of the Tourism Sector in Jamaica, Draft Final Report
- Natsuda K., Igusa K, et al. (2011), *One Village One Product - Rural Development Strategy in Asia: The Case of OTOP in Thailand*, University of East Anglia, UK, Ritsumeikan Center for Asia Pacific Studies (RCAPS), Working Paper No. 11-3, August 2011, retrieved from <http://aizono-associates.com/en/images/pdf/4.pdf>
- Pride Magazine (2014), *Maroon Group Wins UNESCO Award of Excellence for Handicraft*, retrieved from https://www.google.com/search?q=UNESCO+Handicraft+Prize+%2B+bench+drum&rls=com.microsoft:en-US:IE-Address&ie=UTF-8&oe=UTF-8&sourceid=ie7&rlz=1I7ADRA_enJM400&gws_rd=ssl
- Revised White Paper on Arts, Culture and Heritage Version 2 (4 June 2013)<http://nac.org.za/about-us/policies/white-paper-on-arts-culture-and-heritage>
- Rovine, V. (2008), *Bogolan: shaping culture through cloth in contemporary Mali*, Indiana University Press
- Ryerson, Scott H. (1976), *Seri Ironwood Carving: An Economic View*, in *Ethnic and Tourist Arts: Cultural Expressions from the Fourth World*, Nelson H. H. Graburn, ed. Berkeley: University of California Press
- Seychelles Nation Online newspaper (n.d.), “*New Craft policy to optimize performance, increase economic growth: Ban on sales of imported craft on government -owned premises*”, <http://www.seychelles.net/seynat/archives/70300103.html>
- UNESCO and International Trade Centre (ITC) (1997), *Final Report of the International Symposium on Crafts and the International Market: Trade and Customs Codification*. Philippines, 6-8 October 1997
- UNESCO-UIS (2009), *2009 UNESCO Framework for Cultural Statistics (FCS)*, UNESCO Institute for Statistics, retrieved from <http://unesdoc.unesco.org/images/0019/001910/191061e.pdf>
- United Nations/ UNDP/ UNESCO (2013), *Creative Economy Report 2013 Special Edition: Widening Local Development Pathways*
- Wolfe Wilson, S. (2010), *Towards Sustainable Craft Production in Jamaica*, *The Journal of Modern Craft*, Volume 3- Issue 2- July 2010
- Zulaikha, Ellya & Brereton, Margot (2011), *Innovation strategies for developing the traditional souvenir craft industry*, retrieved from <http://eprints.qut.edu.au/43468/>

